

# How to Use the Hancock Database

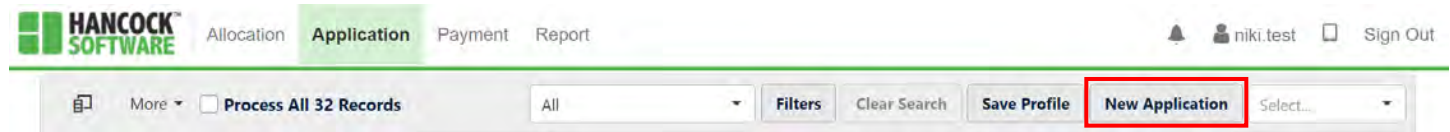
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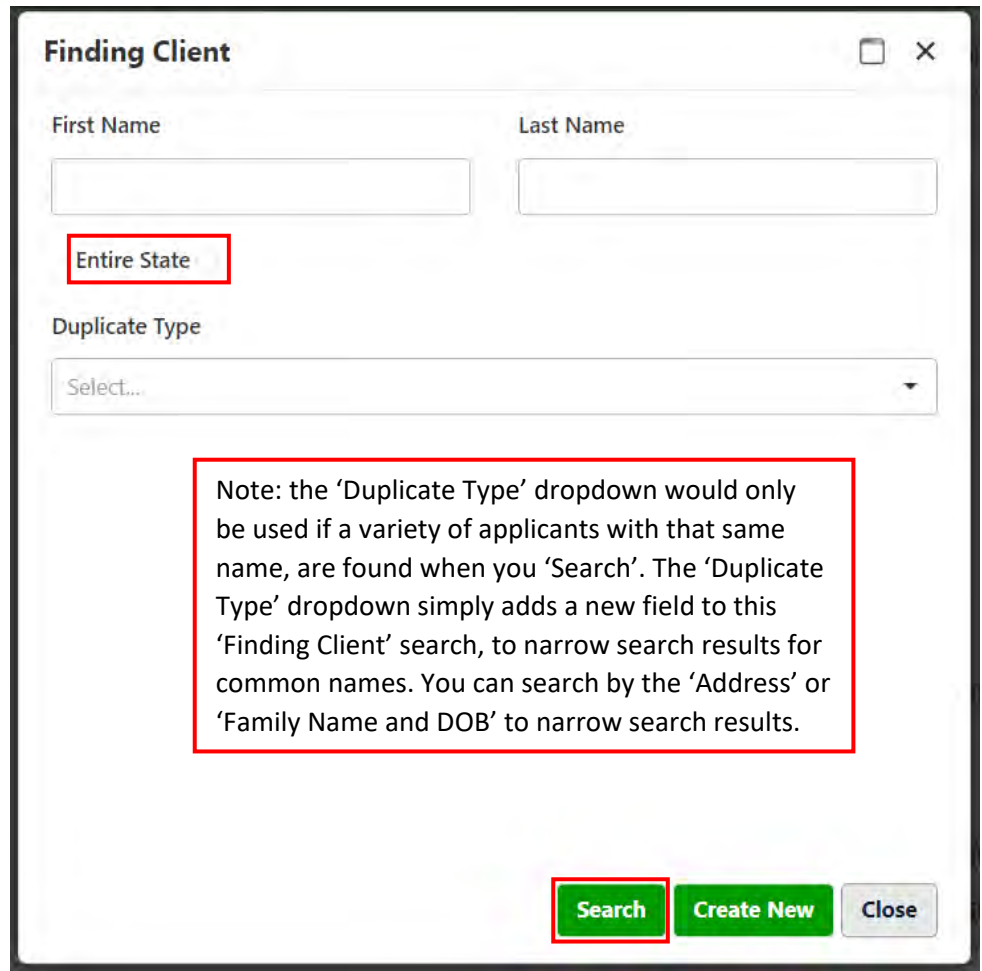
# The Application Info Tab of Hancock

## 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.

The screenshot shows a modal window titled 'Finding Client'. It has a close button (X) in the top right corner. The form contains two input fields for 'First Name' and 'Last Name'. Below these is a dropdown menu labeled 'Entire State' (highlighted with a red box). Underneath is a section labeled 'Duplicate Type' with a dropdown menu showing 'Select...'. A red-bordered box contains a note: '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.' At the bottom right, there are three buttons: 'Search' (highlighted with a red box), 'Create New' (in green), and 'Close' (in grey).

4. Check off 'Entire State'.

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 9 in 'How to Add a New Application to Hancock'.

The 'Finding Client' window has a title bar with a close button. It contains two input fields for 'First Name' (Jane) and 'Last Name' (Doe). Below these is a checked checkbox for 'Entire State' and a dropdown menu for 'Duplicate Type' set to 'Select...'. A red box highlights the message 'No record matches!'. At the bottom are three buttons: 'Search' (green), 'Create New' (green), and 'Close' (grey).

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

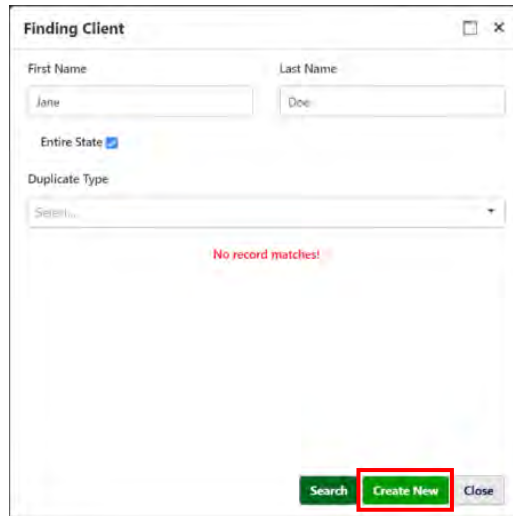
The 'Finding Client' window shows a search for 'Allen Smith'. The 'Entire State' checkbox is checked, and the 'Duplicate Type' dropdown is set to 'Select...'. A red box highlights the message '1 records match!'. At the bottom are four buttons: 'Search' (green), 'View List' (green, highlighted with a red box), 'Create New' (green), and 'Close' (grey).

6. If you see the '**# records match!**' message, click 'View List' to see the following:

More + <input type="checkbox"/> Process All 1 Records		All Filters Clear Search Save Profile New Application View 20 Rows											
Client Number	Application Status	First Name	Last Name	Applied Date	Certified Date	Agency	Certifier	Home Address	City	ZIP	Phone	Alternate Phone	Children
316329628	Benefit Payment Request Complete	Allen	Smith	12/6/2022	12/6/2022			1546 Elm Street Unit 3	Arvada	80003	(303) 634-7865		

7. Double click on the application produced via the 'View List' function.
8. Details of their assistance can be seen via the 'Benefits' tab.
  - a. There may be more than one assistance provided to an applicant, so also check the 'History' tab!
  - b. Note: you will not see the 'Agency' or the 'Intake User' information unless this applicant was assisted at your agency. This information is blank if a different EOC partner agency assisted this applicant. You can still learn assistance amount details, but if you need to know the agency that assisted an applicant, please contact EOC.

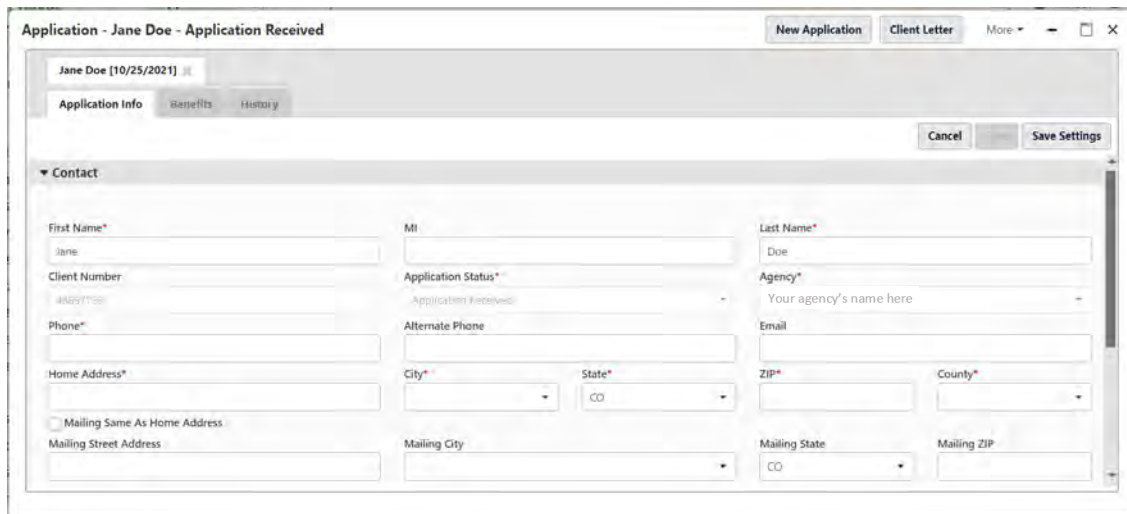
9. If the 'View List' search results do not produce any client results, or if your applicant has not received the assistance that you are about to provide, click 'Create New'.



The 'Finding Client' dialog box contains the following fields and controls:

- First Name: Jane
- Last Name: Doe
- Entire State: ☒
- Duplicate Type: Select...
- Message: No record matches!
- Buttons: Search, Create New (highlighted with a red box), Close

where the following will appear:



The 'Application - Jane Doe - Application Received' form includes the following sections and fields:

- Header: Jane Doe [10/25/2021], New Application, Client Letter, More...
- Tabs: Application Info (selected), Benefits, History
- Buttons: Cancel, Save Settings
- Section: Contact
  - First Name\*: Jane
  - Client Number: 486517788
  - Phone\*:
  - Home Address\*:
  - Mailing Same As Home Address: ☐
  - Mailing Street Address:
  - MI:
  - Application Status\*: Application Received
  - Alternate Phone:
  - City\*:
  - State\*: CO
  - Mailing City:
  - Last Name\*: Doe
  - Agency\*: Your agency's name here
  - Email:
  - ZIP\*:
  - County\*:
  - Mailing State: CO
  - Mailing ZIP:

10. Complete the fields in 'Contact' in the 'Application Info' tab. Tips and tricks are below!

Application - Jane Doe - Application Received

New Application Client Letter More

Jane Doe [10/25/2021]

Application Info Benefits History

Cancel Save Save Settings

Jane Doe [10/25/2021]

Application Status\* Application Received

Agency\* Your agency's name here

Phone\*

Home Address\*

☐ Mailing Same As Home Address

Mailing Street Address

City\* State\* CO

Mailing City Mailing State CO Mailing ZIP

Family

Utility Account Information

- The applicant's first and last name will automatically populate from your Client Search.
- You cannot use (parenthesis) -dashes- or .periods. to enter a phone number. Simply enter all digits and Hancock will automatically reformat the phone number.
- The 'Application Status' and 'Agency' fields cannot be changed.
  - The 'Application Status' will update as you submit an assistance for payment.
- County options are limited to the area your agency serves. You must select the County from the drop-down menu that will appear to make this information save. If you need access to a County not listed, please contact EOC.
- Checking off 'Mailing Same As Home Address' will automatically update the mailing address to match the 'Home Address'.
- Any fields with a red asterisk\* are required fields.
- Please always try to collect applicant email addresses!** EOC uses applicant's emails to connect applicants to other EOC programs. Phone numbers can fluctuate often, but emails tend to remain the same, and thus are a reliable way to contact applicants to enroll them in other EOC programs.

## 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, gender, ethnicity, race, and employment status is reported, so this field must always be expanded and updated!**

The screenshot shows a web application window titled "Application - Jane Evelyn Doe - Application Received". It has tabs for "Application Info", "Benefits", and "History". Below the tabs are buttons for "Cancel", "Save", "Verify Address", and "Save Settings". The "Contact" section is expanded, showing fields for First Name, MI, Last Name, Client Number, Application Status, Agency, Phone, Alternate Phone, Email, Home Address, City, State, ZIP, County, Mailing Same As Home Address, Mailing Street Address, Mailing City, Mailing State, and Mailing ZIP. At the bottom of the form, the "Family" field is highlighted with a red box.

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.

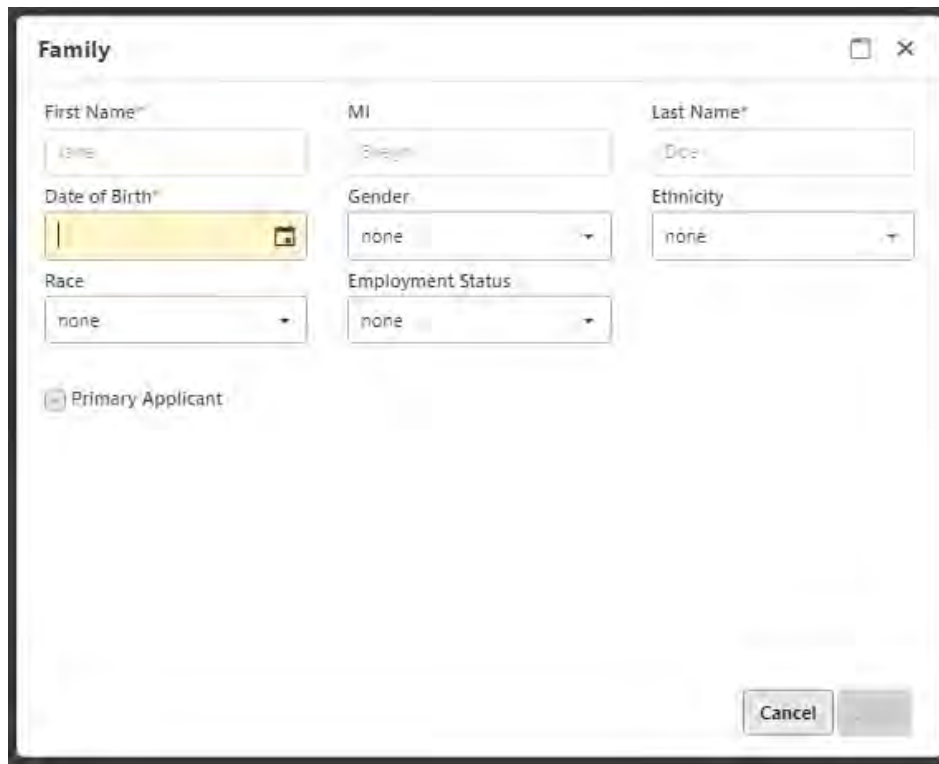
The screenshot shows the "Family" section of the application form. It includes a table for "Occupants" with columns for First Name, MI, Last Name, Date of Birth, Gender, Ethnicity, Race, Employment Status, and Primary Applicant. The "Annual Household Income\*" field is highlighted with a red box. There are also checkboxes for "Income Verified" and "Income Self-attested".

2. 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', simply **collect their current household monthly income for the month they are completing their application and multiply that number by 12** to report their 'Annual Household Income'.
3. Select Income Self-attested or Income Verified (based on what is collected, but income verification is not required).
4. Hover over the applicant's name, to highlight the applicants name in yellow, as seen below:

The screenshot shows the "Family" section of the application form. The "Occupants" table has a row for "Jane" which is highlighted in yellow. The table columns are First Name, MI, Last Name, Date of Birth, Gender, Ethnicity, Race, Employment Status, and Primary Applicant.

5. **Double click** the applicant's highlighted name.

To reveal the following:



The 'Family' form includes the following fields:

- First Name\*
- MI
- Last Name\*
- Date of Birth\*
- Gender
- Ethnicity
- Race
- Employment Status
- ☐ Primary Applicant

Buttons: Cancel, OK

**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'.

6. 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:



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).

Birthdays can only be entered in the backslash format:

4/9/1977

05/03/1991

7. Record the applicant's Gender according to the following options
- Note: the Primary Applicant's Gender cannot be 'none', or you will not be able to qualify the application in Hancock.
  - If the applicant does not want to disclose their gender, they can select 'Prefer Not to Say' on their EOC application

Gender

none

none

Female

Male

Non-Binary

Other

Prefer Not to Say

8. Record the applicant's Ethnicity according to the following options:
- Note: the Primary Applicant's Ethnicity cannot be 'none', or you will not be able to qualify the application in Hancock.
  - If the applicant does not want to disclose their ethnicity, they can select 'Unknown/Not Reported' on their EOC application.

Ethnicity

none

none

Hispanic/Latinx/Spanish

Not Hispanic/Latinx/Spanish

Unknown/Not reported

9. Record the applicant's Race according to the following options:
- Note: the Primary Applicant's Race cannot be 'none', or you will not be able to qualify the application in Hancock.
  - You may need to scroll within the Race dropdown menu to find the reported option. You can also type the Primary Applicants Race to narrow these options.
  - If the applicant does not want to disclose their Race, they can select 'Unknown/Not Reported' on their EOC application.

Race

none

none

Asian

Black/African American

Hawaiian/Pacific Islander

Multi-Race

Native American/Alaskan Native

Other

Unknown/Not reported

White



10. Record the applicant's Employment Status according to the following options:
- d. Note: the Primary Applicant's 'Employment Status' cannot be 'none', or you will not be able to qualify the application in Hancock. Rather, select 'Unemployed'.

Employment Status

none

none

Employed Full Time

Employed Part Time

Unemployed

Retired

Other

11. Once all fields are complete, click 'Save'.

**Family**

First Name\* MI Last Name\*

Date of Birth\* Gender\* Ethnicity

Race Employment Status

☒ Primary Applicant

Cancel Save

## How to Add Household Members

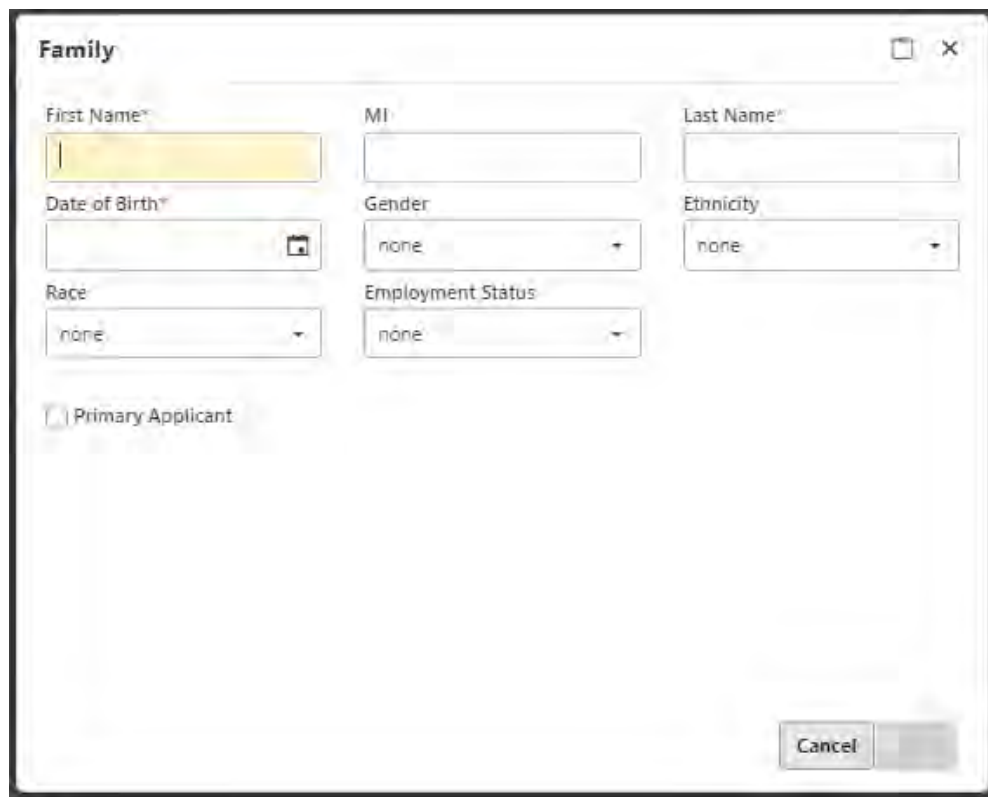
If there is only one household member, skip to the section called “How to Update Demographics Information”.

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



The screenshot shows a web application interface for managing household members. At the top, there's a 'Family' section header. Below it, there are input fields for 'Occupants' (value: 1) and 'Annual Household Income\*' (value: 19000). There are also checkboxes for 'Income Verified' and 'Income Self-attested' (checked). Below these fields is a table of household members. The table has columns: First Name, MI, Last Name, Date of Birth, Gender, Ethnicity, Race, Employment Status, and Primary Applicant. The first row shows a member named Jane Evelyn Doe, born 4/7/1977, female, Hispanic/Latin/Spanish, unknown/not reported, unemployed, and marked as the primary applicant. A 'Remove' button is next to the table, and a 'New' button is highlighted with a red box.

To reveal the following:



The screenshot shows a 'Family' form in a web application. The form is titled 'Family' and contains several input fields: 'First Name\*' (highlighted with a yellow box), 'MI', 'Last Name\*', 'Date of Birth\*' (with a calendar icon), 'Gender' (dropdown menu), 'Ethnicity' (dropdown menu), 'Race' (dropdown menu), 'Employment Status' (dropdown menu), and a checkbox for 'Primary Applicant'. A 'Cancel' button is at the bottom right.

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’ ‘Race’ 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. Then, add comments for Hancock that these Date of Births are estimated.
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 to confirm household eligibility based on their reported income.

## 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:

									Remove	New
	First Name	MI	Last Name	Date of Birth	Gender	Ethnicity	Race	Employment Status	Primary Applicant	
<input type="checkbox"/>	Jane	Evelyn	Doe	4/7/1977	Female	Hispanic/Latinx/Spanish	Unknown/Not reported	Unemployed	✓	
<input checked="" type="checkbox"/>	John		Doe	8/23/1974						
<input type="checkbox"/>	Michael		Doe	2/3/2019						

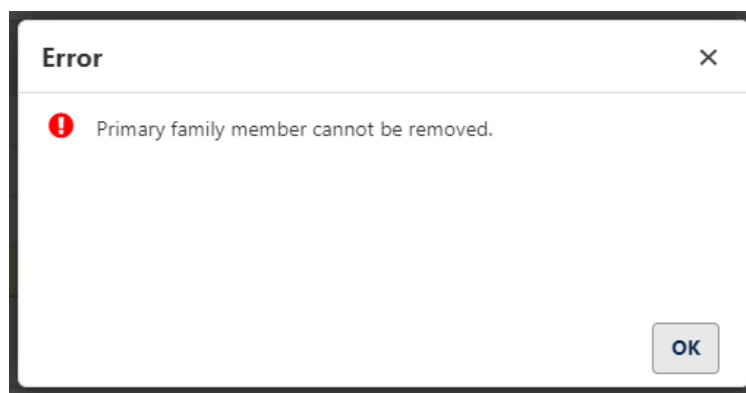
2. Click 'Remove'.

									Remove	New
	First Name	MI	Last Name	Date of Birth	Gender	Ethnicity	Race	Employment Status	Primary Applicant	
<input type="checkbox"/>	Jane	Evelyn	Doe	4/7/1977	Female	Hispanic/Latinx/Spanish	Unknown/Not reported	Unemployed	✓	
<input checked="" type="checkbox"/>	John		Doe	8/23/1974						
<input type="checkbox"/>	Michael		Doe	2/3/2019						

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'.



## How to Update Demographics Information

1. Expand the 'Demographics' section.

The screenshot shows a web application window titled 'Application - Jane Evelyn Doe - Application Received'. At the top, there are buttons for 'New Application', 'Client Letter', and a 'More' dropdown. Below the title bar, there's a search bar with 'Jane Doe [10/25/2021]' and tabs for 'Application Info', 'Benefits', and 'History'. On the right, there are 'Cancel' and 'Save Settings' buttons. The left sidebar has expandable sections: 'Contact', 'Family', and 'Demographics'. The 'Demographics' section is highlighted with a red rectangular box.

To reveal the following:

The screenshot shows the 'Demographics' section expanded. At the top, there are four dropdown menus: 'Application Method\*', 'Applied Date\*' (with a calendar icon and the date 10/25/2021), 'Building Type\*', and 'Owner Type\*'. Below these is a 'Questions' section with a list of questions and an 'Answer' column. The questions are: 'Is anyone in the household disabled?', 'Is anyone in the household a Veteran?', 'Have any of these situations applied to you in the past? Select all that apply.', 'Preferred Language:', 'what is your LEAP status?', and 'If you were denied or ineligible for LEAP, what is the reason?'. Below the questions are three columns of checkboxes for various programs: 'AID to the Blind (AB)', 'Medicare', 'Section 8', 'Social Security Income (SSI)', 'Temporary Aid to Needy Families (TANF)', 'Aid to the Needy Disabled (AND)', 'Medicaid', 'Public housing/rental assistance', 'Supplemental Security Income (SSI)', 'Veterans Disability', 'Food Stamps (SNAP)', 'Old Age Pension (OAP)', 'Social Security Disability Income (SSDI)', 'Women, Infants, & Children (WIC)', and 'None'. At the bottom, there are fields for 'Intake User' (with a placeholder 'Hancock User's Name Here'), 'Created Date' (10/25/2021), 'Last Update' (10/25/2021), 'Certifier', and 'Certified Date'.

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 to the date their application was signed 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 by hovering over the field under 'Answer'. Note that **each** question **must** have an answer!

This screenshot is a close-up of the 'Questions' section from the previous image. A red rectangular box highlights the 'Answer' column, which contains a small upward arrow icon for each question. To the left of this box, a text box with a red border contains the text: 'Hover here to select the response for each question'. A red bracket connects this text box to the 'Answer' column.

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

Questions	Answer ↑
Is anyone in the household disabled?	
Is anyone in the household a Veteran?	
Have any of these situations applied to you in the past? Select all that apply.	
Preferred Language:	
what is your LEAP status?	
If you were denied or ineligible for LEAP, what is the reason?	

- Click the highlighted field under 'Answer' to make a dropdown box appear, where you can record the response as seen below:

Questions	Answer ↑
Is anyone in the household disabled?	Select...
Is anyone in the household a Veteran?	
Have any of these situations applied to you in the past? Select all that apply.	
Preferred Language:	
what is your LEAP status?	
If you were denied or ineligible for LEAP, what is the reason?	

- 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 **green outline**.
  - 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'**.
  - Answers in the 'Have any of these situations applied to you in the past? Select all that apply.' box will appear as the following:

Questions	Answer ↑
Is anyone in the household disabled?	No
Is anyone in the household a Veteran?	No
Have any of these situations applied to you in the past? Select all that apply.	<div>I went without food so that I could pay my energy bill X Went without medication(s) or medical care to pay bill X Set thermostat too low/high to save on utilities X</div>

- To remove any situation, click the 'x' next to the situation.
- 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

- 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 'What is your LEAP Status?'.
  - If the household 'Received LEAP in the last 12 months' select 'N/A' for 'If you were denied or ineligible for LEAP, what is the reason?'.**
- Scroll in the 'Demographics' section and identify every benefit received in the household by checking off every benefit received.
    - Note: if the household receives no benefits, you must select 'None'.

- b. If an applicant reports \$0 income, but also report that they receive a cash benefit (AID to the Blind, Social Security Income, TANF, Aid to the Needy Disabled, SSI, Veterans Disability, OAP, SSDI, or WIC) ask applicants about this! In these cases, applicants either:
- i. Did not know they needed to report income from their benefits
  - ii. Are in process of applying for a cash benefit but have not received an award letter. In this case, the benefit should **not** be selected/reported.

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

<b>Intake User</b> <input type="text" value="Hancock User's Name Here"/>	<b>Created Date</b> <input type="text" value="10/25/2021"/>	<b>Last Update</b> <input type="text" value="10/25/2021"/>
<b>Certifier</b> <input type="text"/>	<b>Certified Date</b> <input type="text"/>	

Rather, this information will update as assistances are processed by EOC!

## How to Add Utility Account Information

1. Expand the 'Utility Account Information' section.

The screenshot shows a web application window titled 'Application - Jane Evelyn Doe - Application Received'. At the top, there are buttons for 'New Application' and 'Client Letter', and a 'More' dropdown menu. Below the title bar, there is a search bar with 'Jane Doe [10/25/2021]' and a close button. A tabbed interface shows 'Application Info', 'Benefits', and 'History'. The 'Application Info' tab is active, and it contains a 'Cancel' button, a green 'Save' button, and a 'Save Settings' button. Below the tabs, there are expandable sections for 'Contact', 'Family', 'Demographics', and 'Utility Account Information'. The 'Utility Account Information' section is highlighted with a red rectangular box.

To reveal the following:

Primary Heating Source\*

The screenshot shows a table with the following columns: Fuel Vendor, Account Number, Same As Applicant, Account Holder First Name, Account Holder Last Name, and Comment. The table is empty, and a message 'There are no records available.' is displayed. In the top right corner, there are 'Remove' and 'New' buttons. The 'New' button is highlighted with a red rectangular box.

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

Primary Heating Source\*

3. Add the utility account information by clicking New.

The screenshot shows the same table as before, but the 'New' button in the top right corner is highlighted with a red rectangular box.

To reveal the following:

The screenshot shows two forms. The top form, titled 'Energy Consumption', has fields for 'Fuel Vendor\*' (a dropdown menu), 'Account Number\*' (a text box), 'Amount Owed\*' (a text box), 'Same As Applicant' (a checkbox), 'Account Holder First Name\*' (a text box), and 'Account Holder Last Name\*' (a text box). There is also a 'Comment' text area. The bottom form, titled 'Energy Service Status', has a table with columns 'Date', 'Crisis - Resolution - Severity', and 'Current Status'. The table is empty, and a message 'There are no records available.' is displayed. Buttons for 'Remove', 'New', 'Cancel', and 'Save' are visible.

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. If you are certain the applicant's County is correct, contact EOC with the utility company and County if you do not see the utility company you need to select from 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.
5. Enter the 'Account Number' exactly as it is written on the bill.

**Important Xcel Energy Account Number Exception!**

- a. Note: if you are providing an Xcel Energy assistance, only use the 7 OR 10 digits between the dashes as the account number
  - i. Example: the account number is 53-9857626-1, use the account number 9857626 **not** 5398576261.
- b. If the account number between the dashes is a 6,8, or 9 digit account number, add 0's to the beginning of the account number, to equal 7 (for a 6 digit account number between the dashes) or 10 digits (for an 8 or 9 digit account number between the dashes), but the bill will typically have a 7 or 10 digit number between the dashes.
  - i. Example: the account number between the dashes is 76009622 (an 8-digit number), use 0076009622 to create a 10-digit account number.

6. Enter the total 'Amount Owed' for the bill **not the amount you plan to assist with.**

**VERY  
IMPORTANT  
NOTE!**



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. Example, "account holder is landlord" or "account holder is applicants' spouse".
9. Add an Energy Service Status by clicking 'New'.
  - a. Note: the 'New' button will be greyed out until you select a 'Fuel Vendor'.

Energy Service Status			Remove	New
Date	Crisis - Resolution - Severity	Current Status		
There are no records available.				

To reveal the following:

Service Status			Remove	New
Date	Crisis - Resolution - Severity	Current Status		
10/25/2021				

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:

Crisis - Resolution - Severity	↑
Select...	▼

11. Select the 'Crisis – Resolution – Severity' from the dropdown 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.

Date	Crisis - Resolution - Severity	Current Status
10/25/2021	Past due balance - Prevented - Energy Crisis	

Cancel Save

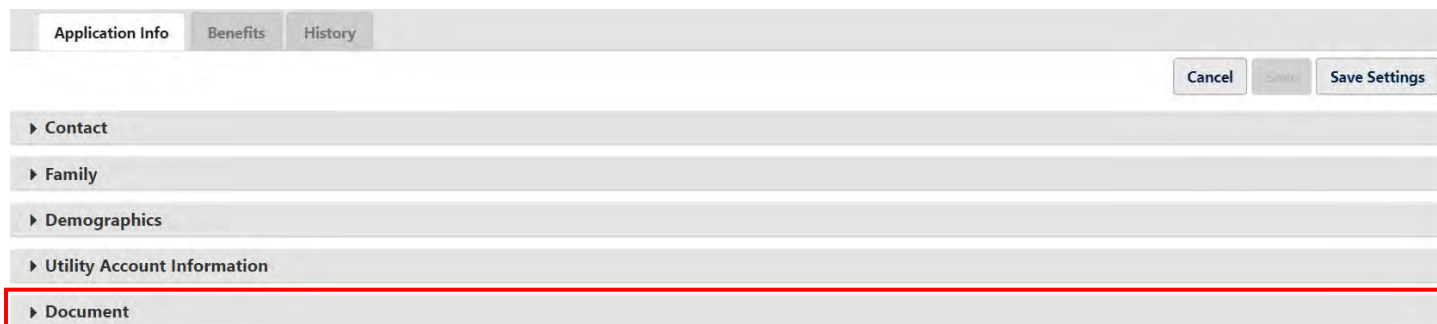
12. Click 'Save'.

13. To add any additional EOC assistances, follow steps 3-12 in "How to Add Utility Account Information".

## Updating the Document Section

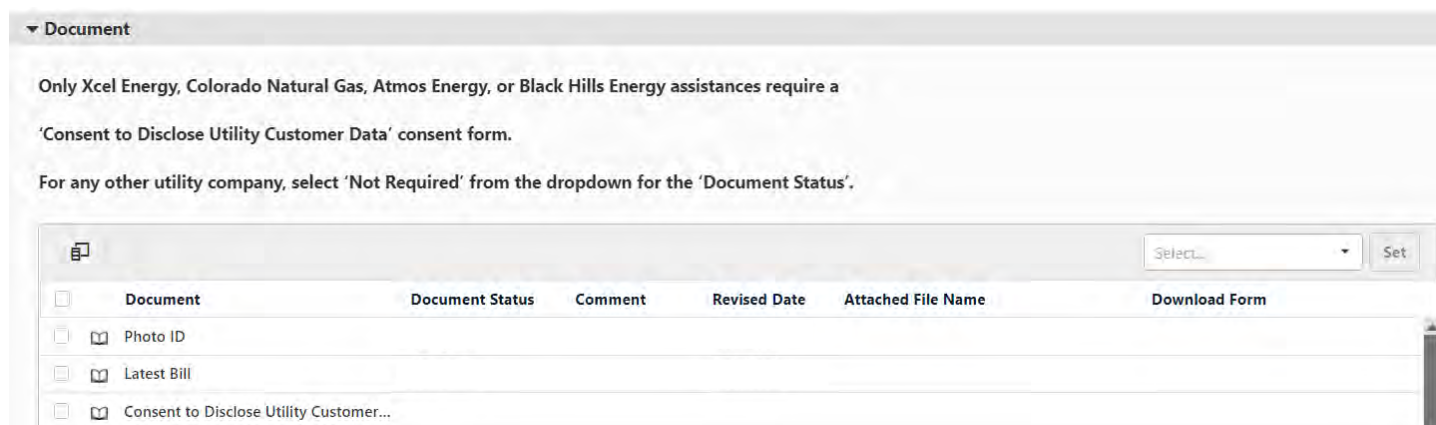
EOC is not asking for you to upload applicant documents to Hancock (yet) so think of the 'Document' section as a checklist, to ensure you have collected the required documents to provide this applicant with this assistance.

1. Expand the 'Document' section, as seen below:



The screenshot shows a web application interface with three tabs: 'Application Info', 'Benefits', and 'History'. The 'Application Info' tab is active. On the right side of the tab bar are three buttons: 'Cancel', 'Save', and 'Save Settings'. Below the tabs is a list of sections: 'Contact', 'Family', 'Demographics', 'Utility Account Information', and 'Document'. The 'Document' section is highlighted with a red rectangular box.

To reveal the following:



The screenshot shows the expanded 'Document' section. It contains the following text:

Only Xcel Energy, Colorado Natural Gas, Atmos Energy, or Black Hills Energy assistances require a 'Consent to Disclose Utility Customer Data' consent form.

For any other utility company, select 'Not Required' from the dropdown for the 'Document Status'.

Below the text is a table with the following columns: Document, Document Status, Comment, Revised Date, Attached File Name, and Download Form. The table contains four rows of documents:

Document	Document Status	Comment	Revised Date	Attached File Name	Download Form
<input type="checkbox"/> Photo ID					
<input type="checkbox"/> Latest Bill					
<input type="checkbox"/> Consent to Disclose Utility Customer...					

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



The screenshot shows the same table as the previous one, but the row for 'Photo ID' is highlighted in yellow. The table now includes a fifth row:

Document	Document Status	Comment	Revised Date	Attached File Name	Download Form
<input type="checkbox"/> Photo ID					
<input type="checkbox"/> Latest Bill					
<input type="checkbox"/> Consent to Disclose Utility Customer...					
<input type="checkbox"/> EOC Application					

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!

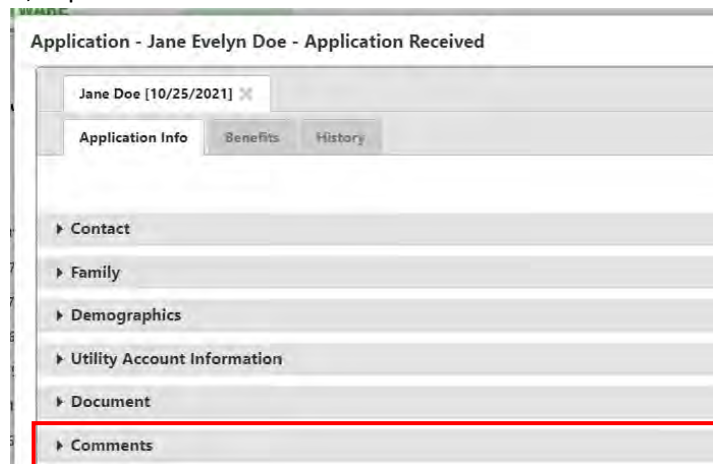
The 'Revised Date' will be the date that you first began entering this application into Hancock. You do not need to update this date.

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
  - a. If the 'Save' button is grayed out, simply flip the 'Document Status' to 'Not Required' then back to 'Complete' and the green 'Save' button should become available to you.
7. Follow steps 2-6 in "Updating the Document Section" to update the 'Latest Bill' Document Status.
  - 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 Data' Document Status.
  - a. **Note: If the assistance being provided 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' Document Status.

## Adding Comments to Hancock

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". The 'Comments' section of Hancock can also be used to add any case notes.

1. If you are adding comments, expand the 'Comments' field:



The screenshot shows the Hancock application interface for "Jane Evelyn Doe - Application Received". At the top, there is a search bar with "Jane Doe [10/25/2021]" and a close button. Below this are three tabs: "Application Info", "Benefits", and "History". A list of expandable sections follows: "Contact", "Family", "Demographics", "Utility Account Information", "Document", and "Comments". The "Comments" section is highlighted with a red rectangular border, indicating it is the focus of the instruction.

To reveal the following:



The screenshot shows the expanded "Comments" section. At the top of this section is a button labeled "Show Comments History". Below the button is a text input field labeled "Comment". The "Comment" field is highlighted with a red rectangular border, indicating it is the area where a comment should be added.

2. Add any applicable comments in the 'Comment' field.

3. Click 'Save' or 'Save Comment' as seen below:

The screenshot shows a web application interface with tabs for 'Application Info', 'Benefits', and 'History'. The 'Comments' section is expanded, showing a text area with the comment 'applicant enrolled in ACP.' Below the text area is a 'Save Comment' button, which is highlighted with a red box. At the top right of the form, there is a 'Save' button, also highlighted with a red box, along with 'Cancel', 'Verify Address', and 'Save Settings' buttons.

Once saved, the comment will reflect the following:

The screenshot shows the 'Comments' section with a table of saved comments. The table has columns for 'Comment Date', 'User Name', 'Comment', 'Comment from Client', and 'Comment to Client Sent'. A single comment is listed: '2/21/2023, 2:13 PM' by 'Niki Amon' with the text 'applicant enrolled in ACP.' Below the table is a 'Show Comments History' button, which is highlighted with a red box. There is also a 'Print Comments' button at the top right of the table.

<input type="checkbox"/>	Comment Date	User Name	Comment	Comment from Client	Comment to Client Sent
<input type="checkbox"/>	2/21/2023, 2:13 PM	Niki Amon	applicant enrolled in ACP.		


4. Add as many comments as needed.
- Note: you cannot delete comments once saved.
  - Note: clicking 'Show Comments History' will produce a list of all comments for this application.
  - Anyone at your agency can add notes to other users' applications at your agency, and EOC staff can also add comments to your agency's applications.

# The Benefit Tab of Hancock

## Qualifying an EOC Application in Hancock

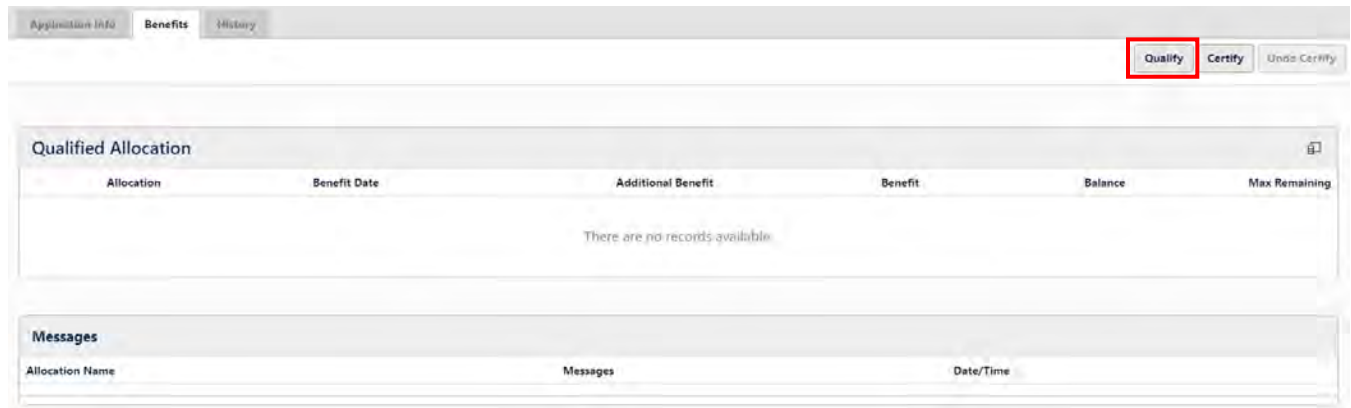
Qualifying an EOC applicant in Hancock is a quick check that each required field is filled in and all document status' have been reported in Hancock. **You will not be able to submit an EOC application if you cannot qualify the application.**

1. Click on the 'Benefits' tab as seen below:



The screenshot shows the top of the Hancock application interface. At the top, it says 'Jane Doe (10/25/2021)'. Below that, there are three tabs: 'Application Info', 'Benefits', and 'History'. The 'Benefits' tab is highlighted with a red rectangular box. To the right of the tabs are buttons for 'Cancel', 'Save Settings', and 'Save'. Below the tabs, there is a section labeled 'Contact' with a dropdown arrow.

To reveal the following:



The screenshot shows the Hancock application interface with the 'Benefits' tab selected. At the top right, there are three buttons: 'Qualify', 'Certify', and 'Undo Certify'. The 'Qualify' button is highlighted with a red rectangular box. Below the buttons, there is a section titled 'Qualified Allocation' with a table header: 'Allocation', 'Benefit Date', 'Additional Benefit', 'Benefit', 'Balance', and 'Max Remaining'. The table is empty, and a message 'There are no records available' is displayed. Below the table, there is a section titled 'Messages' with a table header: 'Allocation Name', 'Messages', and 'Date/Time'.

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 in red in 'Messages' and the 'Application Status' will update from 'Application Received' to 'In process, missing information'.
  - b. Any error messages must be addressed, by fixing what is producing the error. **Once the error is fixed, you must click 'Qualify' again in the 'Benefits' tab, to get rid of any error messages.** This is to say, you must tell Hancock corrections have been made, by clicking 'Qualify' again as it will not automatically know corrections have been made!
  - c. For more information about error messages when clicking 'Qualify' please see the addendum.

Once you click 'Qualify' and there are no errors to address, Utility Account information will appear.

## Certifying an EOC Assistance in Hancock with '2023 Xcel' Funds

Once you click 'Qualify' and there are no errors to address, the following Utility Account information will appear. When you are providing an Xcel Energy assistance, the '2023 Xcel' fund will automatically be available to use once qualified.

**Qualified Allocation**

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input type="checkbox"/> 2023 Xcel		\$0.00	\$0.00	\$0.00	\$2,000.00

**Add Save Cancel Remove**

Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Payment I
<input type="checkbox"/> Xcel Energy - Gas	Gas	0		\$0.00							

1. Click under 'Amount' once to make a blue editable box appear.
2. Enter the amount of assistance you are providing.
3. Click 'Save'.

**Qualified Allocation**

Allocation	Benefit Date
<input type="checkbox"/> 2023 Xcel	

**Add Save Cancel Remove**

Vendor	Fuel Type	Quantity	Unit Cost	Amount
<input type="checkbox"/> Xcel Energy - Gas	Gas	0		325.21

**Qualified Allocation**

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input type="checkbox"/> 2023 Xcel		\$0.00	\$0.00	\$0.00	\$2,000.00

**Add Save Cancel Remove**

Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Payment I
<input type="checkbox"/> Xcel Energy - Gas	Gas	0		\$325.21							

4. Check off every box.

**Qualified Allocation**

Allocation	Benefit Date
<input checked="" type="checkbox"/> 2023 Xcel	

**Add Save Cancel Remove**

Vendor	Fuel Type	Quantity	Unit Cost	Amount
<input checked="" type="checkbox"/> Xcel Energy - Gas	Gas	325.21		\$325.21

5. Click 'Certify' and the assistance is submitted for payment!

**Qualified Allocation**

**Qualify Certify Undo Certify**

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input checked="" type="checkbox"/> 2023 Xcel		\$0.00	\$325.21	\$0.00	\$1,674.79

**Add Save Cancel Remove**

Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Payment I
<input checked="" type="checkbox"/> Xcel Energy - Gas	Gas	325.21		\$325.21							



## Certifying an EOC Assistance in Hancock with '2023 Colorado Natural Gas' Funds

Once you click 'Qualify' and there are no errors to address, the following Utility Account information will appear. When you are providing a Colorado Natural Gas assistance, the '2023 Colorado Natural Gas' fund will automatically be available to use once qualified.

1. Click under 'Amount' once to make a blue editable box appear.
2. Enter the amount of assistance you are providing.
3. Click 'Save'.

The screenshot shows the 'Qualified Allocation' form. The 'Amount' field for the '2023 Colorado Natural Gas' allocation is highlighted with a red box and contains the value '201.94'.

Allocation	Benefit Date
2023 Colorado Natural Gas	

Vendor	Fuel Type	Quantity	Unit Cost	Amount
Colorado Natural Gas - Gas	Gas	0		201.94

The screenshot shows the 'Qualified Allocation' form with the 'Save' button highlighted with a red box. The 'Amount' field is now highlighted with a green box.

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Colorado Natural Gas		\$0.00	\$0.00	\$0.00	\$1,000.00

Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Paymer
Colorado Natural Gas - Gas	Gas	0		201.94							

Buttons: Add, Save, Cancel, Remove

4. Check off every box.

The screenshot shows the 'Qualified Allocation' form with all checkboxes checked. The 'Amount' field is highlighted with a green box.

Allocation	Benefit Date
2023 Colorado Natural Gas	

Vendor	Fuel Type	Quantity	Unit Cost	Amount
Colorado Natural Gas - Gas	Gas	0		\$201.94

5. Click 'Certify; and the assistance will be submitted for payment!

The screenshot shows the 'Qualified Allocation' form with the 'Certify' button highlighted with a red box. The 'Amount' field is highlighted with a green box.

Buttons: Qualify, Certify, Undo Certify

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Colorado Natural Gas		\$0.00	\$0.00	\$0.00	\$1,000.00

Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Paymer
Colorado Natural Gas - Gas	Gas	0		\$201.94							

Buttons: Add, Save, Cancel, Remove

## Certifying one EOC Assistance in Hancock with '2023 Black Hills' Funds

Once you click 'Qualify' and there are no errors to address, the following Utility Account information will appear. When you are providing a Black Hills Energy assistance, the '2023 Black Hills' fund will automatically be available to use once qualified.

**Qualified Allocation**

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input type="checkbox"/> 2023 Black Hills		\$0.00	\$0.00	\$0.00	\$2,000.00

**Buttons:** Add, Save, Cancel, Remove

Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Paym
<input type="checkbox"/> Black Hills Energy - Electricity	Electricity	0		\$0.00							

1. Click under 'Amount' once to make a blue editable box appear.
2. Enter the amount of assistance you are providing.
3. Click 'Save'.

**Qualified Allocation**

Allocation	Benefit Date
<input type="checkbox"/> 2023 Black Hills	

**Buttons:** Add, Save, Cancel, Remove

Vendor	Fuel Type	Quantity	Unit Cost	Amount
<input type="checkbox"/> Black Hills Energy - Electricity	Electricity	0		525.61

**Qualified Allocation**

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input type="checkbox"/> 2023 Black Hills		\$0.00	\$0.00	\$0.00	\$2,000.00

**Buttons:** Add, Save, Cancel, Remove

Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Paym
<input type="checkbox"/> Black Hills Energy - Electricity	Electricity	0		525.61							

4. Check off every box.

**Qualified Allocation**

Allocation	Benefit Date
<input checked="" type="checkbox"/> 2023 Black Hills	

**Buttons:** Add, Save, Cancel, Remove

Vendor	Fuel Type	Quantity	Unit Cost	Amount
<input checked="" type="checkbox"/> Black Hills Energy - Electricity	Electricity	0		525.61

5. Click 'Certify' and the assistance is submitted for payment!

Qualify

Certify

Undo Certify

Qualified Allocation

<input checked="" type="checkbox"/>	Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input checked="" type="checkbox"/>	2023 Black Hills		\$0.00	\$0.00	\$0.00	\$2,000.00

AddSaveCancelRemove

<input checked="" type="checkbox"/>	Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Paym
<input checked="" type="checkbox"/>	Black Hills Energy - Electricity	Electricity	0		\$525.61							

## Certifying two Black Hills Energy Assistances in Hancock with '2023 Black Hills' Funds

Black Hills Energy is the only regulated utility company that provides gas and electric service but will sometimes provide customers with two separate account numbers for their electric bill and their gas bill, instead of using one account number for a combined gas and electric bill. The following instructions are for when an applicant is seeking help with a Black Hills Energy electric bill and Black Hills Energy gas bill, which have different account numbers.

Once you click 'Qualify' and there are no errors to address, the following Utility Account information will appear. When you are providing any Black Hills Energy assistances, the '2023 Black Hills' fund will automatically be available to use once qualified. Note that when you are qualifying multiple assistances, only one of the utility types will appear.

<input type="checkbox"/>	Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input type="checkbox"/>	<a href="#">2023 Black Hills</a>		\$0.00	\$0.00	\$0.00	\$2,000.00

Add

Save

Cancel

Remove

<input type="checkbox"/>	Vendor	Fuel Type	Quantity	Unit Cost	↑ Amou...	Service Date	Agency Approval
<input type="checkbox"/>	Black Hills Energy - Gas	Gas	0		\$0.00		

1. Update the 'Benefit' amount to the **total** amount of assistance you are providing for **both** utility assistances by double clicking on \$0.00 under 'Benefit'
  - a. Example: an applicant has a \$322.17 Black Hills Energy Electric bill and a \$925.11 Black Hills Energy Gas bill. You update the 'Benefit' amount to 1,247.28; the total amount of assistance you are providing for both assistances.
  - b. When you double click under 'Benefit' the following will appear:

Qualified Allocation

Allocation \*

2023 Black Hills

Base

0.00

Max Remaining Balance \$2,000.00

Additional Benefit

0.00

MAX \$0.00

Cancel

Save

- c. Update the 'Benefit' amount in the 'Base' field to the **total** amount of assistance you are providing for **both** utility assistances

- d. click 'Save'

Qualified Allocation

Allocation \*

2023 Black Hills

Base

1247.28

Additional Benefit

0.00

MAX \$0.00

Max Remaining Balance \$2,000.00

Cancel

Save

- Once saved, the 'Benefits' tab will update to the following, which is normal!

Qualified Allocation							
Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining		
2023 Black Hills		\$0.00	\$1,247.28	\$0.00	\$752.72		
<div> <div>Add</div> <div>Save</div> <div>Cancel</div> <div>Remove</div> </div>							
Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval	
Black Hills Energy - Gas	Gas	1,247.28		\$1,247.28			

- Update the 'Amount' for the first utility type listed by clicking under 'Amount' where a blue box will appear. Note that Hancock will not let you certify an assistance larger than \$1,000 for a single energy type, so you could not successfully certify the above assistance. You do not need to update the 'Quantity'.

Qualified Allocation							
Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining		
2023 Black Hills		\$0.00	\$1,247.28	\$0.00	\$752.72		
<div> <div>Add</div> <div>Save</div> <div>Cancel</div> <div>Remove</div> </div>							
Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval	
Black Hills Energy - Gas	Gas	1,247.28		925.11			

- Click 'Save' and your 'Benefits' tab will update to the following:

Qualified Allocation							
Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining		
2023 Black Hills		\$0.00	\$1,247.28	\$322.17	\$1,074.89		
<div> <div>Add</div> <div>Save</div> <div>Cancel</div> <div>Remove</div> </div>							
Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval	
Black Hills Energy - Gas	Gas	1,247.28		\$925.11			



- Click 'Add' to add the second Black Hills Energy assistance.
- When you click 'Add' the following dropdown box will appear:

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Black Hills		\$0.00	\$1,247.28	\$322.17	\$1,074.89

Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval
Select...						
Black Hills Energy - Gas	Gas	1,247.28	\$925.11			

- Click inside the blue drop down box that appears and select the utility type you have not added to the 'Benefits' tab.

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Black Hills		\$0.00	\$1,247.28	\$322.17	\$1,074.89

Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval
Select...						
Black Hills Energy - Electricity						
Black Hills Energy - Gas	Gas	1,247.28	\$925.11			

- Click under 'Amount' once to make a blue editable box appear. Enter the amount of assistance you are providing for the second assistance.

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Black Hills		\$0.00	\$1,247.28	\$322.17	\$1,074.89

Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval
Black Hills Energy - Electricity	Electricity					
Black Hills Energy - Gas	Gas	1,247.28	\$925.11			

- Add the amount of assistance under 'Amount', confirming that you are entering the correct assistance amount for each **respective** energy assistance.

**Qualified Allocation**

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Black Hills		\$0.00	\$1,247.28	\$322.17	\$1,074.89

**Add Save Cancel Remove**

Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval
Black Hills Energy - Electricity	Electricity			322.17		
Black Hills Energy - Gas	Gas	1,247.28		\$925.11		

10. Click 'Save'

**Qualified Allocation**

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Black Hills		\$0.00	\$1,247.28	\$322.17	\$1,074.89

**Add Save Cancel Remove**

Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval
Black Hills Energy - Electricity	Electricity			322.17		
Black Hills Energy - Gas	Gas	1,247.28		\$925.11		

11. Check off every box.

**Qualified Allocation**

<input checked="" type="checkbox"/>	Allocation	Benefit Date	Additional Benefit	Benefit
<input checked="" type="checkbox"/>	2023 Black Hills		\$0.00	\$1,247.28

**Add S**

<input checked="" type="checkbox"/>	Vendor	Fuel Type	Quantity	Unit Cost	Amou...
<input checked="" type="checkbox"/>	Black Hills Energy - Electricity	Electricity	322.17		\$322.17
<input checked="" type="checkbox"/>	Black Hills Energy - Gas	Gas	1,247.28		\$925.11

12. Click 'Certify' and both assistances are submitted for payment!

## Certifying an EOC Assistance in Hancock with '2023 Atmos' Funds

Once you click 'Qualify' and there are no errors to address, the following Utility Account information will appear. When you are providing an Atmos Energy assistance, the '2023 Atmos' fund will automatically be available to use once qualified.

1. Click under 'Amount' once to make a blue editable box appear.
2. Enter the amount of assistance you are providing.
3. Click 'Save'

The screenshot shows the 'Qualified Allocation' form. At the top, there's a section for 'Allocation' and 'Benefit Date' with a dropdown menu set to '2023 Atmos'. Below this is a table with columns: Vendor, Fuel Type, Quantity, Unit Cost, and Amount. The row for 'Atmos Energy - Gas' has 'Gas' as the fuel type, '0' as the quantity, and '311.58' as the amount. The 'Amount' field is highlighted with a blue border, indicating it is editable.

This screenshot shows the 'Qualified Allocation' form with more fields. The 'Amount' field for 'Atmos Energy - Gas' is now '\$311.58'. Below the table, there are buttons for 'Add', 'Save', 'Cancel', and 'Remove'. The 'Save' button is highlighted with a red border. The form also includes columns for 'Service Date', 'Agency Approval Date', 'Approved By', 'Comment', 'Credit Notification', 'Payment Date', and 'Payment I'.

4. Check off every box.

This screenshot shows the 'Qualified Allocation' form with all checkboxes checked. The checkboxes are located next to the 'Allocation' section, the '2023 Atmos' dropdown, and the 'Vendor' section. The 'Amount' field for 'Atmos Energy - Gas' is still '\$311.58'.

5. Click 'Certify' and the assistance is submitted for payment!

This screenshot shows the 'Qualified Allocation' form with the 'Certify' button highlighted in red. The form is now fully populated with checked boxes and data. The 'Amount' field for 'Atmos Energy - Gas' is still '\$311.58'. The 'Certify' button is located at the top right of the form.



## Certifying one EOC Assistance in Hancock with '2023 Bill Pay' Funds

Once you click 'Qualify' and there are no errors to address, the following Utility Account information will appear. When you are providing any non-regulated utility assistance (any bill that is **not** Xcel Energy, Colorado Natural Gas, Black Hills Energy, or Atmos Energy), the '2023 Bill Pay' fund will automatically be available to use once qualified.

**Important note:** Bill Pay funds are funds that can only be used at your agency. Please ensure you are keeping tabs on your agencies current quarterly grant balance, per the document "Understanding Quarterly Allocations in Hancock".

- a. Click under 'Amount' once to make a blue editable box appear. Enter the amount of assistance you are providing.

**Qualified Allocation**

<input type="checkbox"/>	Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input type="checkbox"/>	<a href="#">2023 Bill Pay</a>		\$0.00	\$0.00	\$0.00	\$2,000.00

**Add Save Cancel Remove**

<input type="checkbox"/>	Vendor	Fuel Type	Quantity	Unit Cost	↑ Amou...	Service Date	Agency Approval
<input type="checkbox"/>	San Isabel Electric Association - Electricity	Electricity	0		546.91		

- b. Click 'Save'.

**Qualified Allocation**

<input type="checkbox"/>	Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input type="checkbox"/>	<a href="#">2023 Bill Pay</a>		\$0.00	\$0.00	\$0.00	\$2,000.00

**Add Save Cancel Remove**

<input type="checkbox"/>	Vendor	Fuel Type	Quantity	Unit Cost	↑ Amou...	Service Date	Agency Approval
<input type="checkbox"/>	San Isabel Electric Association - Electricity	Electricity	0		546.91		

- c. Check off every box.

**Qualified Allocation**

<input checked="" type="checkbox"/>	Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input checked="" type="checkbox"/>	<a href="#">2023 Bill Pay</a>		\$0.00	\$546.91		

**Add Save Cancel Remove**

<input checked="" type="checkbox"/>	Vendor	Fuel Type	Quantity	Unit Cost	↑ Amou...	Service Date	Agency Approval
<input checked="" type="checkbox"/>	San Isabel Electric Association - Electricity	Electricity	546.91		\$546.91		

- d. Click 'Certify'; and the assistance will be submitted for payment!

**Qualified Allocation**

<input checked="" type="checkbox"/>	Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
<input checked="" type="checkbox"/>	<a href="#">2023 Bill Pay</a>		\$0.00	\$546.91	\$0.00	\$1,453.09

**Add Save Cancel Remove**

<input checked="" type="checkbox"/>	Vendor	Fuel Type	Quantity	Unit Cost	↑ Amou...	Service Date	Agency Approval
<input checked="" type="checkbox"/>	San Isabel Electric Association - Electricity	Electricity	546.91		\$546.91		

**Qualify Certify Undo Certify**

## Certifying Multiple EOC Assistances in Hancock with '2023 Bill Pay' Funds

Once you click 'Qualify' and there are no errors to address, the following Utility Account information will appear. When you are providing any non-regulated utility assistance (any bill that is **not** Xcel Energy, Colorado Natural Gas, Black Hills Energy, or Atmos Energy), the '2023 Bill Pay' fund will automatically be available to use once qualified.

Important note:

This applicant is receiving a \$720.36 Big R – Wood assistance and a \$546.91 San Isabel Electric Association assistance.

When you are certifying more than one Bill Pay assistance at once, only one of the utility companies as entered into the application tab, will appear when you qualify the application, as seen below! The utility company that appears will be alphabetical.

The screenshot shows the 'Qualified Allocation' form. At the top, there's a table with columns: Allocation, Benefit Date, Additional Benefit, Benefit, Balance, and Max Remaining. The first row shows '2023 Bill Pay' with values of \$0.00 for Additional Benefit, Benefit, and Balance, and a Max Remaining of \$2,000.00. Below this is a section for adding more allocations with buttons 'Add', 'Save', 'Cancel', and 'Remove'. At the bottom, there's a table for vendor details with columns: Vendor, Service Date, Fuel Type, Amount, Agency Approval Date, Approved By, Comment, Credit Notification, Payment Date, Payment ID, Payment Number, Check Number, PO Number, PO Date, and Original. The first row shows 'Big R - Wood' with a Service Date, Fuel Type of 'Wood', and an Amount of \$0.00.

1. Update the 'Benefit' amount to the **total** amount of assistance you are providing for **both** bills. This applicant is receiving a \$720.36 Big R – Wood assistance and a \$546.91 San Isabel Electric Association assistance. Thus, the 'Benefit' amount would be \$1,267.27.

To update the 'Benefit' amount, double click on \$0.00 under 'Benefit'.

This screenshot is identical to the previous one, but the 'Benefit' field in the table, which currently shows '\$0.00', is highlighted with a red box to indicate it should be double-clicked for editing.

And the following will appear:

This screenshot shows the 'Qualified Allocation' form after the 'Benefit' field has been updated. The 'Base' field, which currently shows '0.00', is highlighted with a yellow box. The 'Max Remaining Balance' is now \$2,000.00. The 'Additional Benefit' field is empty, and the 'MAX' value is \$0.00. The 'Cancel' button is visible at the bottom right.

2. Update the 'Base' amount to the **total** amount of assistance you are providing for **both** bills.

This screenshot shows the 'Qualified Allocation' form after the 'Base' field has been updated. The 'Base' field now shows '\$1,267.27' and is highlighted with a yellow box. The 'Max Remaining Balance' is now \$2,000.00. The 'Additional Benefit' field is empty, and the 'MAX' value is \$0.00. The 'Cancel' and 'Save' buttons are visible at the bottom right.

3. Click 'Save' and the Benefits tab will update to the following:

Qualified Allocation

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Bill Pay		\$0.00	\$1,267.27	\$0.00	\$732.73

☐ Vendor    Service Date    Fuel Type    ☐ Amount    Agency Approval Date    Approved By    Comment    Credit Notification    Payment Date    Payment ID    Payment Number    Check Number    PO Number    PO Date    Original

☐ Big R - Wood          Wood    \$1,267.27

Once saved, the 'Amount' next to the utility company will update to the 'Benefit' amount entered. This is normal!

4. Click once on the 'Amount' next to the utility company in the benefits tab, to make an editable blue box appear

☐ Vendor    Service Date    Fuel Type    ☐ Amount

☐ Big R - Wood          Wood    1267.27

5. Add the amount of assistance you are providing for that specific bill. Updating the 'Quantity' is not required!

Qualified Allocation

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Bill Pay		\$0.00	\$1,267.27	\$0.00	\$732.73

☐ Vendor    Service Date    Fuel Type    ☐ Amount    Agency Approval Date    Approved By    Comment    Credit Notification    Payment Date    Payment ID    Payment Number    Check Number    PO Number    PO Date    Original

☐ Big R - Wood          Wood    \$720.36

6. Click 'Save'.

Qualified Allocation

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Bill Pay		\$0.00	\$1,267.27	\$0.00	\$732.73

☐ Vendor    Service Date    Fuel Type    ☐ Amount    Agency Approval Date    Approved By    Comment    Credit Notification    Payment Date    Payment ID    Payment Number    Check Number    PO Number    PO Date    Original

☐ Big R - Wood          Wood    \$720.36

7. Click 'Add'

Qualified Allocation

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Bill Pay		\$0.00	\$1,267.27	\$0.00	\$732.73

☐ Vendor    Service Date    Fuel Type    ☐ Amount    Agency Approval Date    Approved By    Comment    Credit Notification    Payment Date    Payment ID    Payment Number    Check Number    PO Number    PO Date    Original

☐ Big R - Wood          Wood    \$720.36

And the following will appear:

8. Select the second 'Vendor' from the dropdown that appears

9. Click under 'Amount' for the second assistance, to make an editable field appear.

10. Add the amount of assistance

11. Click 'Save'

12. Check off every box.

Qualified Allocation

☒

☒

☒

☒

☒

Allocation

Benefit Date

2023 Bill Pay

Vendor

Service Date

Fuel Type

Amount

San Isabel Electric Associa...

Electricity

\$546.91

Big R - Wood

Wood

\$720.36

13. Click 'Certify'.

Application Info

Benefits

History

Qualify

Certify

Undo Certify

Qualified Allocation

☒

☒

☒

☒

☒

Allocation

Benefit Date

Additional Benefit

Benefit

Balance

Max Remaining

2023 Bill Pay

\$0.00

\$1,267.27

\$0.00

\$732.73

Vendor

Service Date

Fuel Type

Amount

Agency Approval Date

Approved By

Comment

Credit Notification

Payment Date

Payment ID

Payment Number

Check Number

PO Number

PO Date

Original

San Isabel Electric Associa...

Electricity

\$546.91

Big R - Wood

Wood

\$720.36

Add

Save

Cancel

Remove

And both assistances are submitted for payment!



## Certifying Two Assistances with Two Different Allocations

An allocation refers to the fund or funding source certain bills are paid with. There are 5 allocations, and they are the following:

Allocation	Bills Paid with Allocation
2023 Xcel	Xcel Energy Electric, Xcel Energy Gas, Xcel Energy Gas and Electric
2023 Atmos	Atmos Energy Gas
2023 Black Hills	Black Hills Energy Electric, Black Hills Energy Gas, Black Hills Energy Gas and Electric
2023 Colorado Natural Gas	Colorado Natural Gas Gas
2023 Bill Pay	Pays for any bills except Xcel Energy, Atmos Energy, Black Hills Energy, and/or Colorado Natural Gas bills

When providing more than one assistance with multiple allocations, Hancock will not automatically assign the correct utility company to the correct allocation, like the following:

The screenshot shows the 'Qualified Allocation' interface with two allocations. The first allocation, '2023 Black Hills', is labeled 'Correct' and shows a vendor 'Black Hills Energy - Electri...'. The second allocation, '2023 Bill Pay', is labeled 'Incorrect' and also shows the same vendor 'Black Hills Energy - Electri...'. Red boxes and arrows highlight the vendor names and the 'Correct'/'Incorrect' labels.

Rather, when qualifying multiple assistances with multiple allocations, Hancock will make the same 'Vendor' (utility company) appear under both 'Allocations' (funds or funding sources) based on alphabetical order. So, if you are providing a Black Hills Energy Gas assistance and a CORE electric assistance, Black Hills Energy will appear under both 'Allocations'. If you are proving a Y-W Electric Association assistance and an Xcel Energy assistance, Xcel Energy will appear under both 'Allocations'. This is to say one vendor will always be correct, while one will always be incorrect and require changing.

1. Identify the 'Vendor' (utility company) that needs to be updated to match the correct 'Allocation' (fund or funding source) according to the above chart. So, in this example, the 'Vendor' needs to be updated under '2023 Bill Pay' from Black Hills Energy to Henry Phillips – Wood.

The screenshot shows the '2023 Bill Pay' allocation interface. It displays a table with columns: Vendor, Service Date, Fuel Type, and Amount. The table contains one entry: 'Black Hills Energy - Electri...' with a fuel type of 'Electricity' and an amount of '\$0.00'. A 'Vendor' header is visible above the table.

2. Click once on the 'Vendor' that needs to be changed, and a blue box will appear around the 'Vendor' as seen below.

The screenshot shows a web form titled "2023 Bill Pay". Below the title, there is a table with columns: Vendor, Service Date, and Fuel Type. The first row has a dropdown menu for the Vendor, which is currently set to "Black Hills Energy -". The Fuel Type is "Electricity". A blue rectangular box highlights the Vendor dropdown menu.

3. Click inside the blue 'Vendor' rectangle, to make a dropdown box appear

This screenshot shows the same form as the previous one, but the Vendor dropdown menu is now open. It displays two options: "Black Hills Energy - El..." and "Henry Phillips - Wood". The dropdown menu is highlighted with a blue border.

4. Select the correct 'Vendor' and the 'Benefits' tab will update to the following:

The screenshot shows the "2023 Bill Pay" form with the "Benefits" tab selected. At the top, there are four tabs: "Add", "Save", "Cancel", and "Remove". The "Save" tab is highlighted with a red box. Below the tabs is a table with columns: Vendor, Service Date, Fuel Type, Amount, Agency Approval Date, Approved By, Comment, Credit Notification, Payment Date, and Payment ID. The first row shows "Henry Phillips - Wood" as the Vendor, "Wood" as the Fuel Type, and "\$0.00" as the Amount.

5. Click 'Save'

6. Add the 'Amount' of assistance you are providing for the first assistance. **Ensure that you are adding the correct amount of assistance, for the correct utility bill!**

This screenshot shows the "2023 Bill Pay" form with the "Benefits" tab selected. The "Save" button is highlighted with a red box. The table below it has columns: Allocation, Benefit Date, Additional Benefit, Benefit, Balance, and Max Remaining. The first row shows "2023 Black Hills" as the Allocation, "\$0.00" as the Additional Benefit, "\$0.00" as the Benefit, "\$0.00" as the Balance, and "\$2,000.00" as the Max Remaining. Below the table, there is a table with columns: Vendor, Service Date, Fuel Type, Amount, Agency Approval Date, Approved By, Comment, Credit Notification, Payment Date, and Payment ID. The first row shows "Black Hills Energy - Electri..." as the Vendor, "Electricity" as the Fuel Type, and "\$546.91" as the Amount. The "Amount" column is highlighted with a red box.

7. Click 'Save'.

This screenshot shows the "2023 Bill Pay" form with the "Benefits" tab selected. The "Save" button is highlighted with a red box. The table below it has columns: Allocation, Benefit Date, Additional Benefit, Benefit, Balance, and Max Remaining. The first row shows "2023 Black Hills" as the Allocation, "\$0.00" as the Additional Benefit, "\$0.00" as the Benefit, "\$0.00" as the Balance, and "\$2,000.00" as the Max Remaining. Below the table, there is a table with columns: Vendor, Service Date, Fuel Type, Amount, Agency Approval Date, Approved By, Comment, Credit Notification, Payment Date, and Payment ID. The first row shows "Black Hills Energy - Electri..." as the Vendor, "Electricity" as the Fuel Type, and "\$546.91" as the Amount. The "Amount" column is highlighted with a red box.

8. Add the 'Amount' of assistance you are providing for the second assistance. **Ensure that you are adding the correct amount of assistance, for the correct utility bill!**

2023 Bill Pay \$0.00 \$0.00 \$0.00 \$2,000.00

Add Save Cancel Remove

Vendor	Service Date	Fuel Type	Amount	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date
Henry Phillips - Wood		Wood	\$220.36					

9. Click 'Save'.

2023 Bill Pay \$0.00 \$0.00 \$0.00 \$2,000.00

Add **Save** Cancel Remove

Vendor	Service Date	Fuel Type	Amount	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date
Henry Phillips - Wood		Wood	\$220.36					

10. check off every box:

Qualify **Certify** Undo Certify

Qualified Allocation

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Black Hills		\$0.00	\$546.91	\$0.00	\$1,453.09

Add Save Cancel Remove

Vendor	Service Date	Fuel Type	Amount	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Payment ID	Payment Number	Check Number	PO Number	PO Date	Orig
Black Hills Energy - Electrici...		Electricity	\$546.91											

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Bill Pay		\$0.00	\$220.36	\$0.00	\$1,779.64

Add Save Cancel Remove

Vendor	Service Date	Fuel Type	Amount	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Payment ID	Payment Number	Check Number	PO Number	PO Date	Orig
Henry Phillips - Wood		Wood	\$220.36											

11. Click 'Certify' and both assistances are submitted for payment!



## Confirming if an EOC Application has been Submitted for Payment

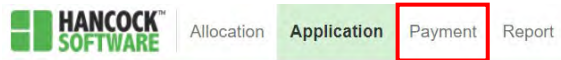
EOC processes certified applications for payment every Thursday morning for checks to be mailed the following Monday. Utility companies paid via ACH payment, are sent electronic payments the following Tuesday.

- a. Note: EOC will approve any Certified application. We assume that if an assistance is Certified in Hancock, that the applicant qualifies for assistance. When an application is processed for payment by EOC, paid applications cannot be edited or removed. Instead, incorrect assistances are refunded in Hancock.

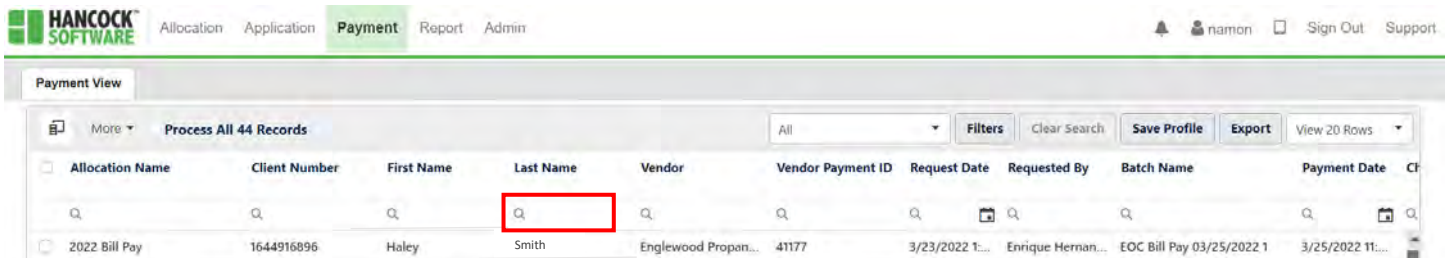
There are two ways to confirm if an application has been submitted for payment, and one way to confirm when an assistance was processed for payment.

The easiest first way to confirm if an application is submitted for payment, is if the 'Application Status' is 'Benefit Payment Request Complete'.

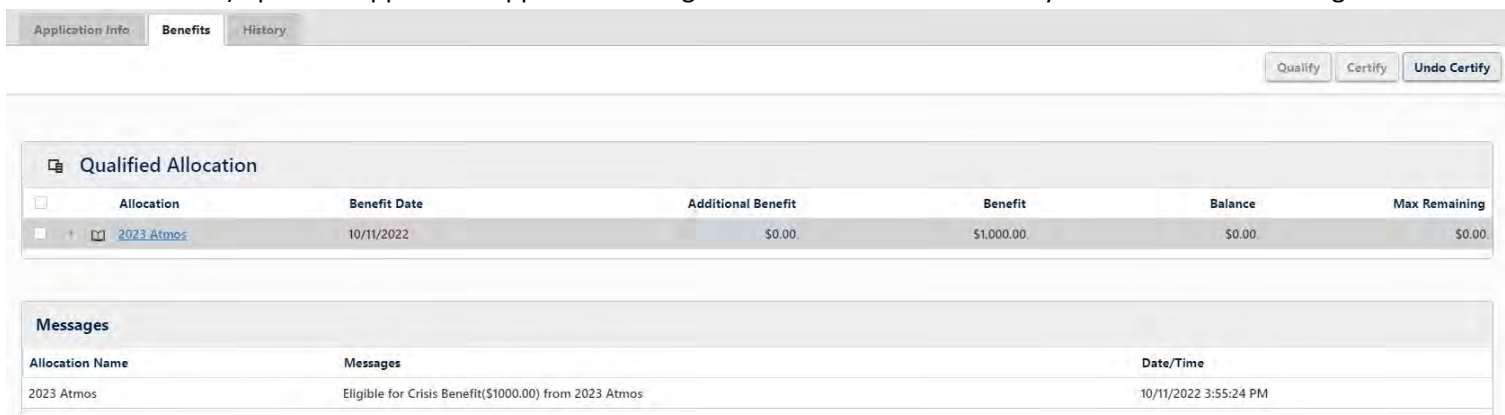
1. From the Hancock homepage, click on the 'Payment' tab as seen below:



Where you will see the following:



2. To search for an EOC assistance that has been submitted for payment, 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 Certified applications entered by your agency will be visible in the 'Payment' tab.
3. To confirm if an assistance was processed for payment (at which point the assistance cannot be undo-certified or deleted) open the applicant's application and go to the 'Benefits' tab where you will see the following:



4. Expand the utility assistance details by clicking on the small arrow to the left of the specific allocation



To see the following:

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Atmos	10/11/2022	\$0.00	\$1,000.00	\$0.00	\$0.00

Switch Vendor

Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Payment ID	Pa
Atmos Energy - Gas	Gas	1,000	\$1,000.00		10/11/2022					10/13/2022	42662	000

If the assistance has been paid, you will see a payment date here:

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Atmos	10/11/2022	\$0.00	\$1,000.00	\$0.00	\$0.00

Switch Vendor

Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Payment ID	Pa
Atmos Energy - Gas	Gas	1,000	\$1,000.00		10/11/2022					10/13/2022	42662	000

If you do not see the 'Payment Date' column in your benefits tab, it's due to the size of your screen. Hover your mouse over the utility assistance information and a scroll bar will appear, allowing you to scroll to the 'Payment Date' column.

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023 Atmos	10/11/2022	\$0.00	\$1,000.00	\$0.00	\$1,000.00

Switch Vendor

Vendor	Fuel Type	Quantity	Unit Cost	Amou...	Service Date	Agency Approval Date	Approved By	Comment	Credit Notification	Payment Date	Payment ID	Pa
Atmos Energy - Gas	Gas	1,000	\$1,000.00		10/11/2022					10/13/2022	42662	000

If there is not a date under 'Payment Date' the assistance has not been processed for payment yet and the application can be undo-certified and updated or deleted if needed.

As a reminder, if the 'Application Status' is not 'Benefit Payment Request Complete' the assistance is not submitted for payment.

# Addendum

## Adding Assistances to Paid Applications

Some applicants apply for two assistances in one grant year, while some applicants apply for EOC assistances with the same EOC Partner Agency year after year.

Note that a new application must always be collected for an applicant, unless the application is less than 30 days old from the date it was signed by the applicant.

To add another assistance for an applicant, simply use the 'New Application' button function from the application homepage **if you are certain that an applicant has not already received an assistance this grant year for this same bill.**

## How to Upload Documents to Hancock

With this new EOC database, application materials can be uploaded, however uploading documents to Hancock is not required (yet). These application materials will only be visible to you, your agency, and EOC staff, and will not be shared among EOC partner agencies.

1. Expand the 'Document' field.

The screenshot shows the 'Application - Jane Evelyn Doe - Application Received' window. The 'Document' field is highlighted with a red box. The interface includes tabs for 'Application Info', 'Benefits', and 'History'. There are buttons for 'New Application', 'Client Letter', 'Cancel', and 'Save Settings'.

To reveal the following:

The screenshot shows the 'Document' field expanded, displaying a list of documents: 'Photo ID', 'Latest Bill', 'Consent to Disclose Utility Customer...', and 'EOC Application'. A red box highlights the 'Consent to Disclose Utility Customer...' document. An 'Important Note' box is overlaid on the right side of the screenshot, stating: '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 screenshot shows the 'Document' field expanded, displaying the 'Attach Document' button highlighted with a red box. The interface includes fields for 'Document\*', 'Document Status\*', 'Comment', 'Revised Date', and 'Attached File Name'. There are buttons for 'Attach Document', 'Cancel', and 'Save'.

-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.

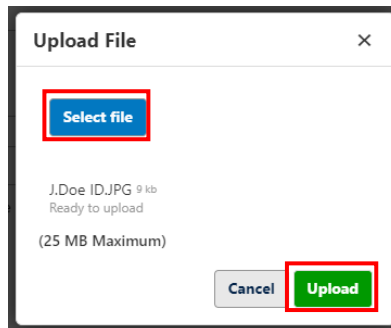
The 'Comment' section is where you can include comments if you would like to highlight anything special about the document collected, but this is not required!

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:

The screenshot shows the 'Upload File' dialog box, which includes a 'Select file' button, a '(25 MB Maximum)' label, and 'Cancel' and 'Upload' buttons.

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 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** for EOC application purposes.

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'.

## How to Upload Documents to Hancock once an Application is Certified or Paid

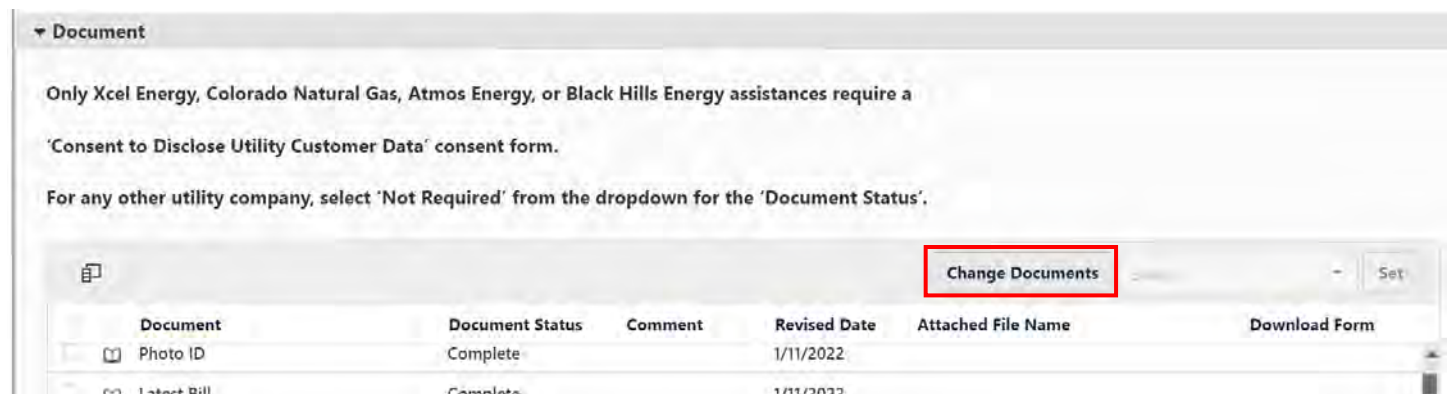
EOC may request that you upload a document to Hancock after an application has been paid, so EOC can assist the household with a different service offered through EOC, like signing the applicant up for a Community Solar Garden.

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



The screenshot shows the Hancock application interface with tabs for 'Application Info', 'Benefits', and 'History'. On the right, there are buttons for 'Cancel', 'Save', and 'Save Settings'. A list of sections is shown on the left: 'Contact', 'Family', 'Demographics', 'Utility Account Information', and 'Document'. The 'Document' section is highlighted with a red box.

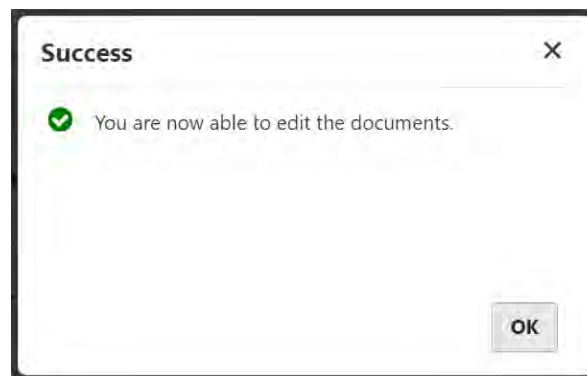
To reveal the following:



The screenshot shows the 'Document' section of the Hancock application. It contains instructions: 'Only Xcel Energy, Colorado Natural Gas, Atmos Energy, or Black Hills Energy assistances require a 'Consent to Disclose Utility Customer Data' consent form. For any other utility company, select 'Not Required' from the dropdown for the 'Document Status'.' Below the instructions is a table with columns: Document, Document Status, Comment, Revised Date, Attached File Name, and Download Form. The table lists two documents: 'Photo ID' and 'Latest Bill', both with a status of 'Complete' and a revised date of '1/11/2022'. A red box highlights the 'Change Documents' button in the top right corner of the table area.

Document	Document Status	Comment	Revised Date	Attached File Name	Download Form
Photo ID	Complete		1/11/2022		
Latest Bill	Complete		1/11/2022		

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

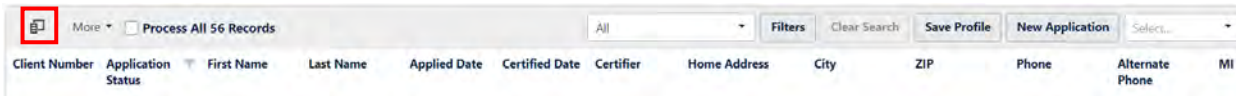


3. Upload the requested document per the Addendum instructions in 'How to Upload Documents to Hancock'.

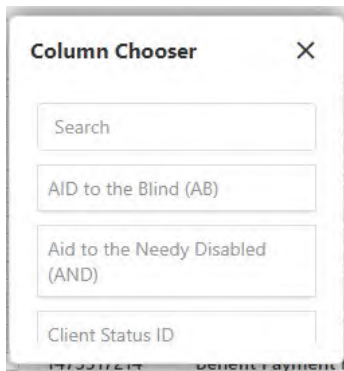
## Customizing Information Fields in Hancock

Hancock allows users to customize any information fields within multiple different tabs (Admin, Allocation, Application, Payment).

1. Click on the 'Column Chooser' icon.



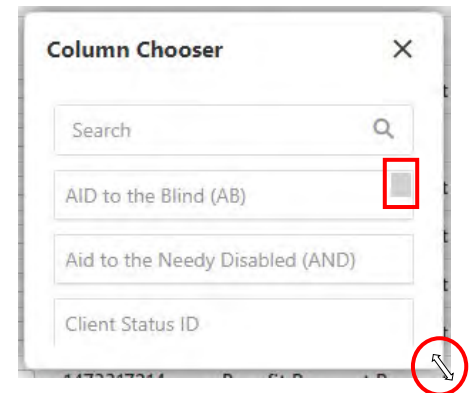
To reveal the following:



Note: you can Hover your mouse inside the 'Column Chooser' box under 'Search' 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.



There are Column Chooser options for almost every information field identified in an EOC application.

Customize what you want to see available on your 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 page.

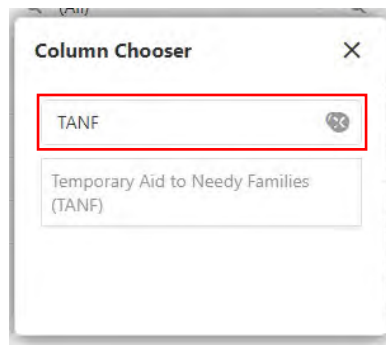
- a. Note: each Hancock user must change their own Column Chooser options. This is to say that the Program Liaisons Application tab fields will not update for their staff, as changes are made.

Highly recommended choices for the Application tab:

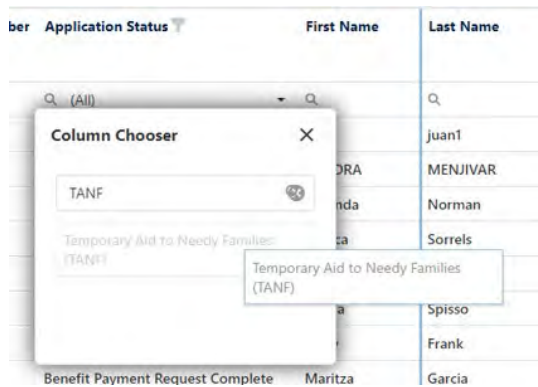
- Application Status
- Certified Date
- Certifier
- Client Number
- City
- County
- Created Date
- First Name
- Home Address
- Intake User
- Last Name
- Phone
- ZIP



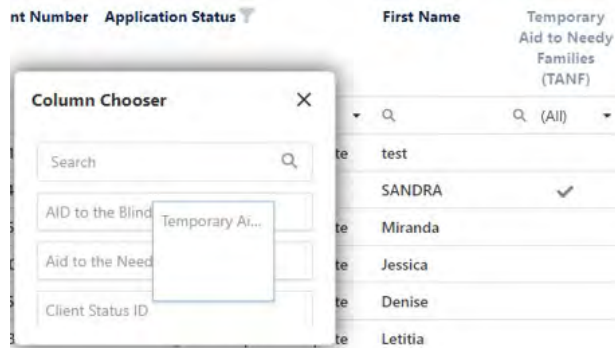
2. To add a field to your application homepage, search for the field you want to add here:



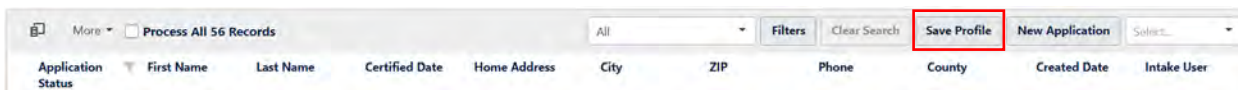
3. Then drag the information field from the 'Column Chooser' box and place it onto your application homepage! The blue line that appears on your application page when you drag an information field is where this information field will land.



4. To remove an information field from your application homepage, open the 'Column Chooser' box and drag the information field title from the application homepage, and drop it into the 'Column Chooser' box.



5. You must click 'Save Profile' to make your preferred information fields save.





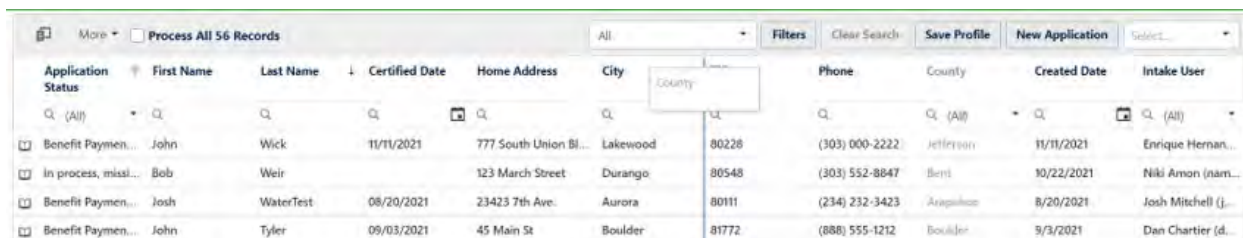
Once saved, the following pop-up will appear:



6. Click 'OK'.

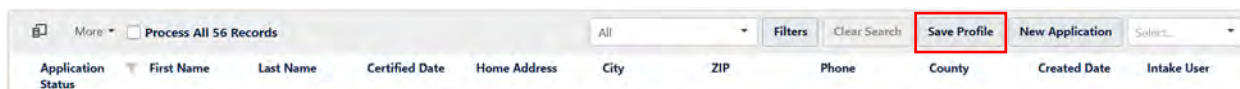
## Customizing the placement of Information Fields in Hancock

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:



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 Hernan...
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 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.

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

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
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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.

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 make your preferred Alphabetical or Chronological choices save.

More

☐
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'.