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.

4. Check off ‘Entire State’.

Note: the ‘Duplicate Type’ dropdown would only be used if a variety of applicants with that same name, are found when you ‘Search’. The ‘Duplicate Type’ dropdown simply adds a new field to this ‘Finding Client’ search, to narrow search results for common names. You can search by the ‘Address’ or ‘Family Name and DOB’ to narrow search results.
5. Click ‘Search’ where the following ‘No record matches!’ message may appear if no applicant by that name has been provided an EOC assistance. If you receive this ‘No record matches!’ message, skip to step 9 in ‘How to Add a New Application to Hancock’.

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

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

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’.

where the following will appear:
10. Complete the fields in ‘Contact’ in the ‘Application Info’ tab. Tips and tricks are below!

- 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!**

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:

5. **Double click** the applicant’s highlighted name.
To reveal the following:

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:

   ![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

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

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

9. Record the applicant’s Race according to the following options:
   a. Note: the Primary Applicant’s Race cannot be ‘none’, or you will not be able to qualify the application in Hancock.
   b. 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.
   c. If the applicant does not want to disclose their Race, they can select ‘Unknown/Not Reported’ on their EOC application.
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’.

11. Once all fields are complete, click ‘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:

   To reveal the following:

   2. Enter the ‘First Name’, ‘Last Name’, and ‘Date of Birth’ for the next member of the household. You do not need to enter the ‘Gender’ ‘Ethnicity’ ‘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:

2. Click ‘Remove’.

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.

To reveal the following:

2. Identify the ‘Application Method’ according to one of the following options: In Person, Mail, Email, Fax.
3. The ‘Applied Date’ will automatically reflect the day that you began entering this EOC application into Hancock. Updating this date 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!
When hovering over the Question field you are updating, the field will highlight in yellow as seen below:

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

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

   c. To remove any situation, click the ‘x’ next to the situation.
   d. Once you click outside the ‘Have any of these situations applied to you in the past? Select all that apply.’ answer field, this field will update to the following sentence structure:

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

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

9. Scroll in the ‘Demographics’ section and identify every benefit received in the household by checking off every benefit received.
   a. Note: if the household receives no benefits, you must select ‘None’.
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:

<table>
<thead>
<tr>
<th>Intake User</th>
<th>Created Date</th>
<th>Last Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Field]</td>
<td>10/25/2021</td>
<td>10/25/2021</td>
</tr>
</tbody>
</table>

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

1. Expand the ‘Utility Account Information’ section.

To reveal the following:

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

3. Add the utility account information by clicking New.
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.**
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**

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”.

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

To reveal the following:

- **Energy Service Status**

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

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

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:

```
Application Info  Benefits  History

- Contact
- Family
- Demographics
- Utility Account Information
- Document
```

To reveal the following:

```
Document
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’.

- [ ] Document
  - [ ] Document Status
  - [ ] Comment
  - [ ] Revised Date
  - [ ] Attached File Name
  - [ ] Download Form

- [ ] Photo ID
- [ ] Latest Bill
- [ ] Consent to Disclose Utility Customer...
```

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

```
Document

- [ ] Photo ID
- [ ] Latest Bill
- [ ] Consent to Disclose Utility Customer...
- [ ] EOC Application
```

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

   ![Comments expansion]

   To reveal the following:

   ![Expanded Comments]

2. Add any applicable comments in the ‘Comment’ field.
3. Click ‘Save’ or ‘Save Comment’ as seen below:

Once saved, the comment will reflect the following:

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

   ![Benefits tab](image)

   To reveal the following:

   ![Qualified Allocation](image)

   ![Messages](image)

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.

1. Click under ‘Amount’ once to make a blue editable box appear.
2. Enter the amount of assistance you are providing.
3. Click ‘Save’.
4. Check off every box.
5. Click ‘Certify’ and the assistance is submitted for payment!
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’.

4. Check off every box.

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

1. Click under ‘Amount’ once to make a blue editable box appear.

2. Enter the amount of assistance you are providing.

3. Click ‘Save’.

4. Check off every box.

5. Click ‘Certify’ and the assistance is submitted for payment!
<table>
<thead>
<tr>
<th>Allocation</th>
<th>Benefit Date</th>
<th>Additional Benefit</th>
<th>Benefit</th>
<th>Balance</th>
<th>Max Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023 Black Hills</td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$7,900.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Fuel Type</th>
<th>Quantity</th>
<th>Unit Cost</th>
<th>Amount</th>
<th>Service Date</th>
<th>Agency Approval Date</th>
<th>Approved By</th>
<th>Comment</th>
<th>Credit Notification</th>
<th>Payment Date</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black Hills Energy - Bloc LLC</td>
<td>Electricity</td>
<td>0</td>
<td></td>
<td>$257.44</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

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:

   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’
2. Once saved, the ‘Benefits’ tab will update to the following, which is normal!

```
Qualified Allocation

<table>
<thead>
<tr>
<th>Allocation</th>
<th>Benefit Date</th>
<th>Additional Benefit</th>
<th>Benefit</th>
<th>Balance</th>
<th>Max Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023 Black Hills</td>
<td></td>
<td>$0.00</td>
<td>$1,247.28</td>
<td>$0.00</td>
<td>$752.72</td>
</tr>
</tbody>
</table>
```

3. 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

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Allocation</th>
<th>Benefit Date</th>
<th>Additional Benefit</th>
<th>Benefit</th>
<th>Balance</th>
<th>Max Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black Hills Energy - Gas</td>
<td>2023 Black Hills</td>
<td></td>
<td>$0.00</td>
<td>$1,247.28</td>
<td>$322.17</td>
<td>$1,074.89</td>
</tr>
</tbody>
</table>
```

4. Click ‘Save’ and your ‘Benefits’ tab will update to the following:

```
Qualified Allocation

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Allocation</th>
<th>Benefit Date</th>
<th>Additional Benefit</th>
<th>Benefit</th>
<th>Balance</th>
<th>Max Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black Hills Energy - Gas</td>
<td>2023 Black Hills</td>
<td></td>
<td>$0.00</td>
<td>$1,247.28</td>
<td>$322.17</td>
<td>$1,074.89</td>
</tr>
</tbody>
</table>
```
5. Click ‘Add’ to add the second Black Hills Energy assistance.
6. When you click ‘Add’ the following dropdown box will appear:

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

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

9. Add the amount of assistance under ‘Amount’, confirming that you are entering the correct assistance amount for each respective energy assistance.
10. Click ‘Save’

11. Check off every box.

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’

4. Check off every box.

5. Click ‘Certify’ and the assistance is submitted for payment!
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 agency’s 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.

b. Click ‘Save’.

c. Check off every box.

d. Click ‘Certify’ and the assistance will be submitted for payment!
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.

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’.

And the following will appear:

2. Update the ‘Base’ amount to the **total** amount of assistance you are providing for **both** bills.
3. Click ‘Save’ and the Benefits tab will update to the following:

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

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

6. Click ‘Save’.

7. Click ‘Add’
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.

13. Click ‘Certify’.

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:

<table>
<thead>
<tr>
<th>Allocation</th>
<th>Bills Paid with Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023 Xcel</td>
<td>Xcel Energy Electric, Xcel Energy Gas, Xcel Energy Gas and Electric</td>
</tr>
<tr>
<td>2023 Atmos</td>
<td>Atmos Energy Gas</td>
</tr>
<tr>
<td>2023 Colorado Natural Gas</td>
<td>Colorado Natural Gas Gas</td>
</tr>
<tr>
<td>2023 Bill Pay</td>
<td>Pays for any bills except Xcel Energy, Atmos Energy, Black Hills Energy, and/or Colorado Natural Gas bills</td>
</tr>
</tbody>
</table>

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:

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

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

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

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!

7. Click ‘Save’.
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!**

9. Click ‘Save’.

10. check off every box:

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:

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

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.

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 Assurances to Paid Applications

Some applicants apply for two assurances in one grant year, while some applicants apply for EOC assurances 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.

To reveal the following:

![Document field](image)

**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:

![Photo ID field](image)

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

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

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

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

3. Click on ‘Attach Document’ to reveal the following:
4. Click on ‘Select file’ which will open a file dialog box.
5. Find the correct file you need to upload.
   a. Note: if you save applicant documents in one place, and arrange the files by date created, you can easily find and upload all 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:

   ![Upload File Dialog](image)

   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:

   ![Document Details](image)

   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.

To reveal the following:

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:

![Column Chooser](image1.png)

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.

![Column Chooser](image2.png)

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.

![Column Chooser](image3.png)

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

![Save Profile](image4.png)
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:

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.

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

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

   Once saved, the following pop-up will appear:

   4. Click ‘OK’.