

When first logging into Hancock you will be brought to the Application tab. Here is where you will be able to search for your record. You can use any of the columns to narrow down the list. Records will be imported from CASTINET. Users will review records for accuracy, and upload all appropriate documentation.

Prior to narrowing down the list, you can see the number of records listed along the top. Within each column you will see a magnifying glass, selecting this will allow you to adjust your search:

HANCOCK Admin Alloca	ion Application	Configuration	Invoice Mea	sure More-				🌲 🦀 melissa	.ky.khc 🔲 🗄	Sign Out
More - Process All 71	Records	Crea	ate Project All		- Filters	Clear Search	Save Profile	New Application	Select	•
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To begin you will use the 'Created Date' column and search for the date range needed to find the newly imported records for that period. This column has a variety of options for date search:

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Using the 'Between' option we searched for records created between May 1-7, narrowing our list of 80 records down to just 18:

HAN SOF	<b>COCK</b> <sup>™</sup> Adm	in Allocation	Application	Configuration	Invoice	Meas	ure
Ð	More - Pro	ocess All 18 Rec	ords		Create	• Proje	ct
	Client Number	Client Status	First Name	Last Name	Created Date	t	Stre
	Q	Q	Q	Q	5/1/2021		Q
					5/7/2021	Ö	
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To search for a specific record, enter data in any of the columns and select enter:

HA So	NCOCK <sup>™</sup> Adm	nin Allocation	Application	Configuration	Invoice Mea	sure More≁				🐥 🛔 melissa.	ky.khc 🛛	Sign Out
Ð	More - P	rocess All 4 Reco	ords	Creat	te Project All		• Filter	rs Clear Search	Save Profile	New Application	Select	•
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	969381872	Job Created	Jane	Smith	4/19/2021			123 USA Drive		Columbia	42728	
	600101104	Job Created	Joe	Smoe	9/15/2020			123 Your Street		Similar	00000	(5
	g 56680551	Job Created	Izzy	Stevens	5/3/2021		Stephanie P	123 Maysville Street		Adairville	45644	(5
	333296508	Job Created	JONAH	SMITH	4/19/2021	04/19/2021	Marsha Fen	123 LEE STREET		Shelbyville	40065	(5)

Should your search return no results, try doing a partial search for cases where an address may be: 123 North 7th Ave but could also have been entered as 123 N. 7th Ave.



#### Intake Review

1. Once you have located your record you will double-click the book icon:

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Ð	More 👻 🗌 Pre	ocess All 70 Rec	ords	Create	Project	JI			- Filters	Clear Search	Save Profile	New Ap	plication	Select	•
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	880586315	Job Created	Alice	Stest	5/11/2021					502		AI	len	89067	
	2098297082	Job Created	кнс	Applicant	5/7/2021					123 KHC Street		Be	echwood V	40359	

2. Once in the record you can review each section for accuracy by expanding the field and ensuring all fields marked with a red asterisk are completed:

ty Stevens (05/03/2021) ×     Application num     Application Countification     Contract        Contract <th>lication - Izzy Stevens - Application recei</th> <th>ved</th> <th>More -</th>	lication - Izzy Stevens - Application recei	ved	More -
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Client Number Agency* Client Status   56680551 Community Action Council for Laxington-Fayette, B * Application received *   First Name* Middle Name Last Name*   tzy Image: Stevens Stevens   Phone Alternate Phone Email   (513) 887-5648 Service Apt Number County*   123 Mayoille Street Service Apt Number County*   123 Mayoille Street Service State* Service ZIP*   123 Mayoille Street Service State* Service ZIP*   123 Mayoille Street Mailing Apartment Mailing City*   123 Mayoille Street Address* Mailing Apartment Mailing City*   123 Mayoille Street Address* Mailing ZIP* *   124 Mayoille Street Address Mailing ZIP* *   125 Application * *   126 Address Mailing ZIP* *   127 Active * *   128 Mayoille Street Address Mailing ZIP*   129 Application * *   120 Application *   120 Assertion *   121 Assertion *   122 Assertion Address *   123 Mayoille Street Address* *   124 Address* *   125 Assertion Address *   126 Assertion Address *   127 Assertion Address *   128 Assertion Address *   129 Assertion Address *   129 Assertion Address *   129 Assertion Address			
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#### **Adding Documents**

Appli

1. Here you have the option of multi-selecting documents to mark their status. Select the Documents, then from the dropdown pick the status, and select 'Set':

Ð						Select	- Set
	Document	Document Status	Comment	Received Date	Attached File Nam	Completed	pad Forn
	Copy of client documents (i.e. DL, SS Card)					NotRequired	
	Confirmation Statement for H&S Documents					Missing	
	H&S screening						
	Heating/Electric Costs						
	Hold Harmless statement						_
	Proof of Homeownership						
	Proof of income						
	Release of Information						
	Right to appeal						
	Section 106 Review						
	WX 800 Client Application						

2. To attach a file to a document, double-click the book icon, then select 'Attach Document' within the pop-up and follow the steps in the pop-up that follows:

▶ Family		Document		🗆 ×		
Income	9	Document*	Document Status*			
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Demog	graphics	Comment				
- Docum	nent					
Ð		Received Date			Select 💌	
	Document	5/7/2021			ne Downloa	d Forn
	Copy of client documents (i.e. D	Attached File Name :				
0 0	Confirmation Statement for H&					
	H&S screening					
	Heating/Electric Costs					
	] Hold Harmless statement					
	Proof of Homeownership					
	Proof of income		Attach Document Cancel	Save		
00	Release of Information	NotRequired				
	Right to appeal	NotRequired				



3. You can now see the status as 'Completed' as well as a link to view the file:

Ð						Select	- Set
	Document	Document Status	Comment	Received Date	Attached File Name	• I	Download Forn
	Copy of client documents (i.e. DL, SS Card)	Completed		5/7/2021	SampleUpload.doc	x	
	Confirmation Statement for H&S Documents						
	H&S screening	NotRequired					
	Heating/Electric Costs	NotRequired					
Ľ	Hold Harmless statement	NotRequired					
	Proof of Homeownership	NotRequired					
Ľ	Proof of income	NotRequired					
	Release of Information	NotRequired					
Ľ	Right to appeal	NotRequired					
	Section 106 Review	NotRequired					
	WX 800 Client Application	NotRequired					



#### Qualification

1. Once you have reviewed all data, you will move to the 'Application Qualification' tab, and select 'Qualify':

						1354. Ky. Kito
plication - Izz	y Stevens - Application re	ceived			More -	-
Izzy Stevens	[05/03/2021] 🗙					
Application Ir	fo Application Qualification					
						Qualify
Denied	Denied Reason		Denied Date			
	none	•				
Qualified	Allocation					Ð
	Allocation			Wap Rank	м	ax Remaining
		Т	here are no records avai	ilable.		
Messages						
Allocation Nar	ne		Messages	Date/Time		

2. If there is any missing information you will be met with the following message to show you what is needed:





3. Once corrections have been made, return to 'Application Qualification' and select 'Qualify' once again. You will now note the status changes from 'Application Received' to 'Eligible':

lication - Iz	zy Stevens - Eligible ┥			More -
Izzy Stevens	s [05/03/2021] 🗙			
Application	Info Application Qualificat	ion		
				Qua
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	Allocation		Wap Rank	Max Remain
□ → ₪	Weatherization Ready		27	\$0
	Other		27	\$0
	DSM		27	\$0
	2021 LIHEAP - Wx		27	\$0
	<u>2021 DOE - Wx</u>		27	\$0
Message	S			
Allocation Na	ame	Messages		Date/Time
2021 DOE - V	Vx	Qualified Allocation Record Created	d.	5/11/2021 1:32 :43 PM
2021 LIHEAP	- Wx	Qualified Allocation Record Created	d.	5/11/2021 1:32 :43 PM
DSM		Qualified Allocation Record Created	d.	5/11/2021 1:32 :42 PM
Other		Qualified Allocation Record Created	d.	5/11/2021 1:32 :42 PM

4. You can now return to Application Info and the Demographics section to view the updated Priority Points.

**NOTE:** Once edits have been made to an application, the data cannot be overwritten.



#### **Denying an Application**

To Deny an application you will go to the Benefit screen where you will select the Denied Reason. Note the application status is Application Received:

HA SO	FTWARE Admin	Allocation Application	Configuration Invoice	Measure P	Project Mo	re <del>-</del>				🛔 meli	ssa.ky.khc		Sign Out
Ð	Application - Izz	y Rae Ward - Applicatio	n received	•					N	lore <del>-</del>	- 0	×	•
	Izzy Ward [06	/14/2021] 🗙											Apt
	Application In	Application Qualification	n										
	There is no fuel vend	or in this client									Qualif	У	
	Denied	Denied Beason			Denied Date								
	G	none											
	c												

Once you select your reason the date will populate and the application status will update to Ineligible:

HA SOF	TWARE Adr	nin Allocation	Application	Configuration	Invoice	Measure	Project	More -				🛔 melis	ssa.ky.kl	nc 🗆	Sign Out
Ð	Application	- Izzy Rae War	d - Ineligible	←								More 👻	- (	×	•
	Izzy Wa	d [06/14/2021] 💥													Apt
	Applicat	ion Info Appli	cation Qualification	on											
□ <b>(</b>	There is no fuel	vendor in this clien	t										Qua	lify	
– C															
	U Denied	Denied Re	ason				Denied L	ate		-					
		Cancelled	1			•	6/14/20	21							
										_					

To remove the Denied status you will set the Denied Reason back to 'None':

HAI SOF	<b>NCOCK</b> Admin	Allocation Application	Configuration Invoice Meas	sure Project More≁		🌲 🏝 m	elissa.ky.khc	Sign Out
Ð	Application - Izz	y Rae Ward - Application	n received			More 🗸	- 🗆 ×	•
	Izzy Ward [06	/14/2021] 🗙						Apt
	Application In	nfo Application Qualificati	on					
□ c	There is no fuel vend	lor in this client					Qualify	
- C		<u></u>						
	Denied	Denied Reason		Denied Date				
		none		•				