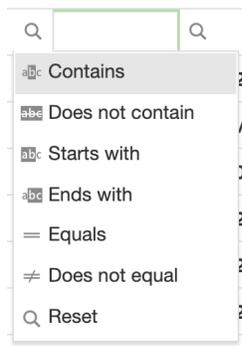
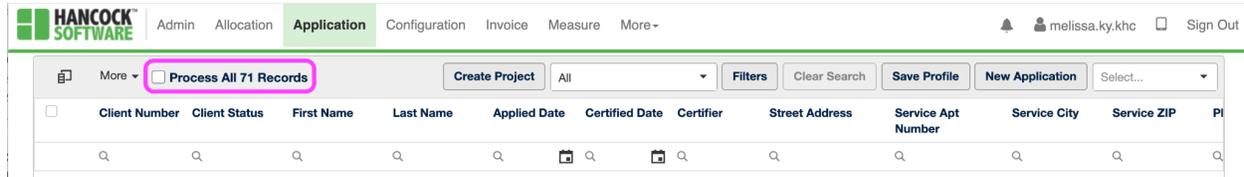
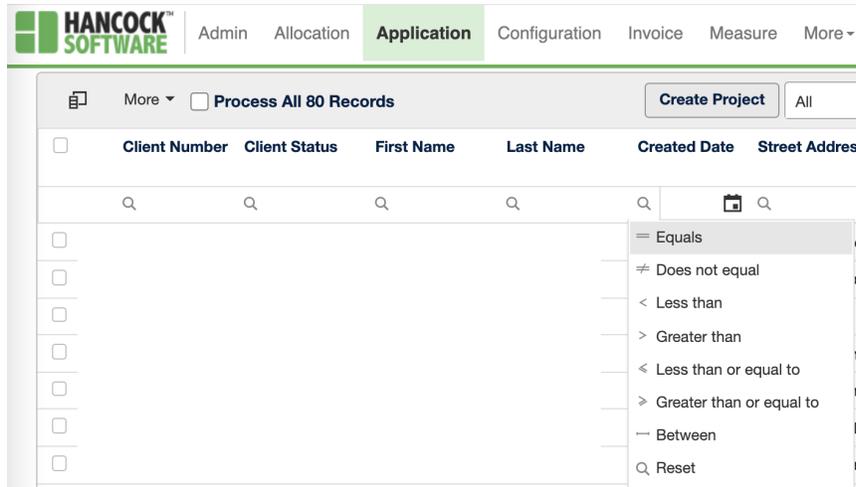


When first logging into Hancock you will be brought to the Application tab. Here is where you will be able to search for your record. You can use any of the columns to narrow down the list. Records will be imported from CASTiNET. Users will review records for accuracy, and upload all appropriate documentation.

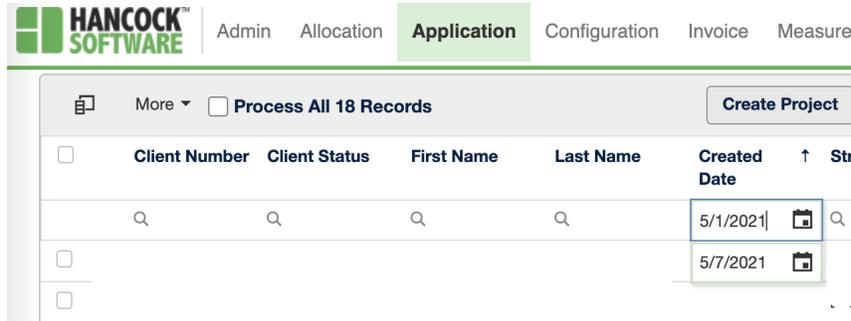
Prior to narrowing down the list, you can see the number of records listed along the top. Within each column you will see a magnifying glass, selecting this will allow you to adjust your search:



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:

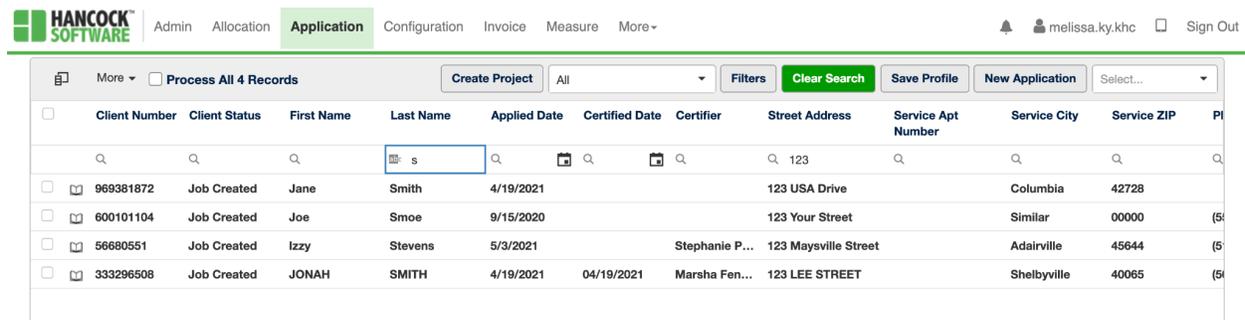


Using the 'Between' option we searched for records created between May 1-7, narrowing our list of 80 records down to just 18:



The screenshot shows the Hancock Software interface with the 'Application' tab selected. A search filter is applied to the 'Created Date' column, showing a date range from 5/1/2021 to 5/7/2021. The table header includes columns for Client Number, Client Status, First Name, Last Name, and Created Date. A 'Process All 18 Records' button is visible at the top of the table.

To search for a specific record, enter data in any of the columns and select enter:



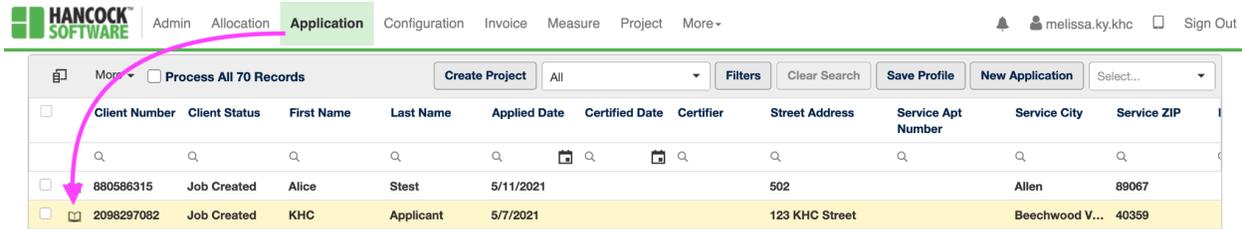
The screenshot shows the Hancock Software interface with the 'Application' tab selected. A search filter is applied to the 'Last Name' column, showing the text 'Smith'. The table header includes columns for Client Number, Client Status, First Name, Last Name, Applied Date, Certified Date, Certifier, Street Address, Service Apt Number, Service City, Service ZIP, and PI. The search results show four records:

Client Number	Client Status	First Name	Last Name	Applied Date	Certified Date	Certifier	Street Address	Service Apt Number	Service City	Service ZIP	PI
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)
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.

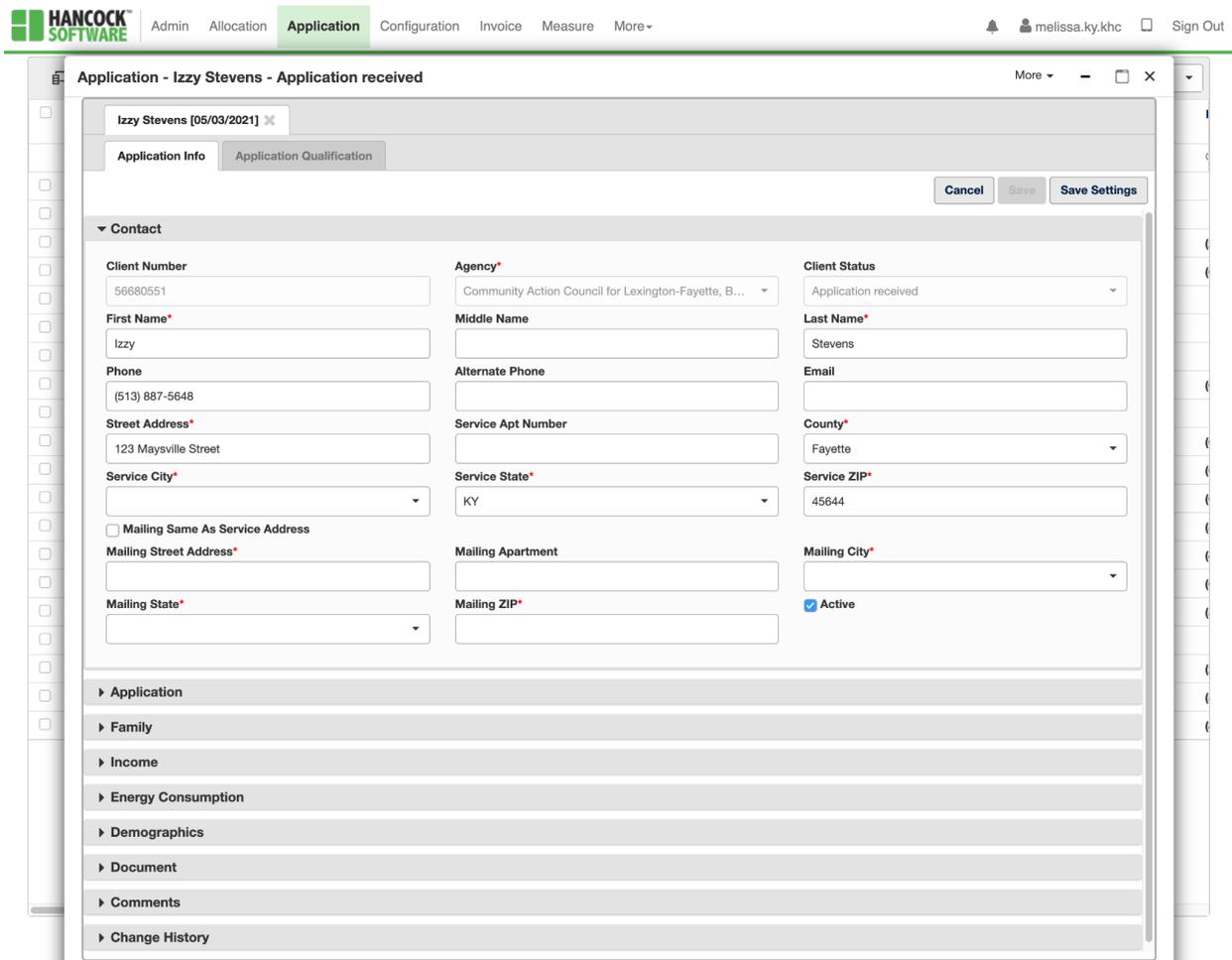
Intake Review

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



Client Number	Client Status	First Name	Last Name	Applied Date	Certified Date	Certifier	Street Address	Service Apt Number	Service City	Service ZIP
880586315	Job Created	Alice	Stest	5/11/2021			502		Allen	89067
2098297082	Job Created	KHC	Applicant	5/7/2021			123 KHC Street		Beechwood 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:



Application - Izzy Stevens - Application received

Izzy Stevens [05/03/2021]

Application Info | Application Qualification

Cancel Save Save Settings

Contact

Client Number: 56880551 Agency*: Community Action Council for Lexington-Fayette, B... Client Status: Application received

First Name*: Izzy Middle Name: Last Name*: Stevens

Phone: (513) 887-5648 Alternate Phone: Email:

Street Address*: 123 Maysville Street Service Apt Number: County*: Fayette

Service City*: Service State*: KY Service ZIP*: 45644

Mailing Same As Service Address

Mailing Street Address*: Mailing Apartment: Mailing City*:

Mailing State*: Mailing ZIP*: Active

Application

Family

Income

Energy Consumption

Demographics

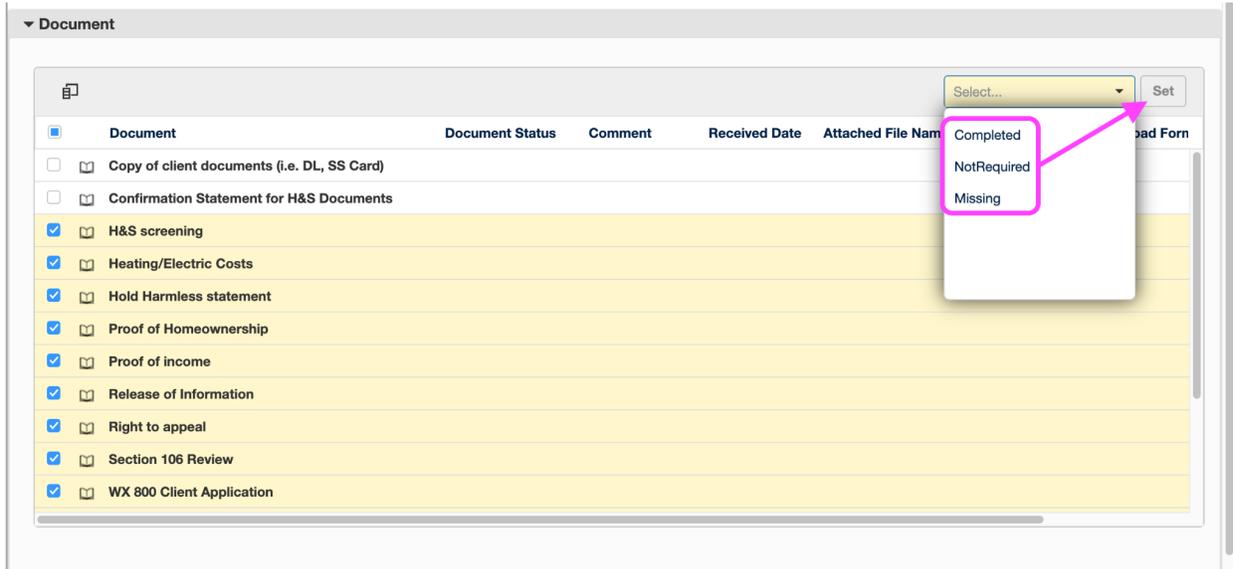
Document

Comments

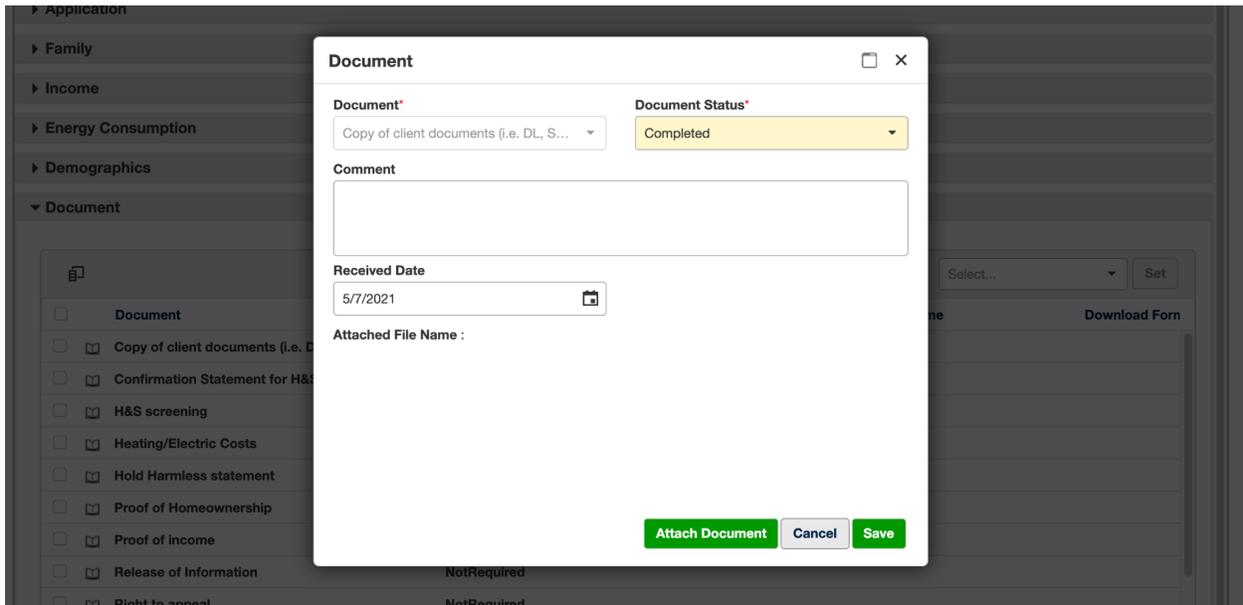
Change History

Adding Documents

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':



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:



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

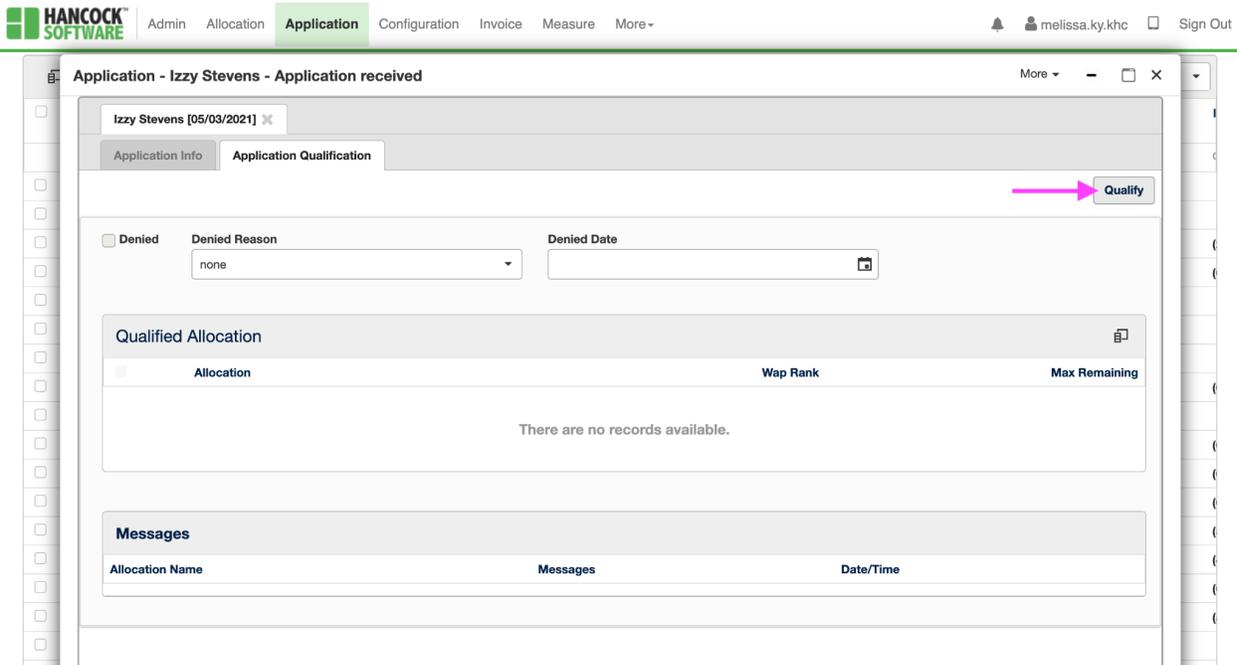
Document

Select... Set

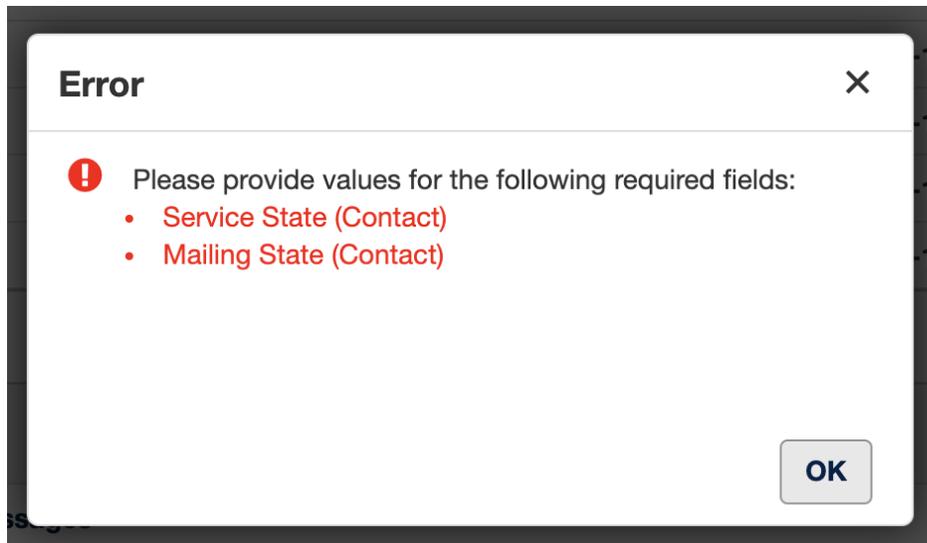
<input type="checkbox"/>	Document	Document Status	Comment	Received Date	Attached File Name	Download Form
<input type="checkbox"/>	<input type="checkbox"/> Copy of client documents (i.e. DL, SS Card)	Completed		5/7/2021	SampleUpload.docx	
<input type="checkbox"/>	<input type="checkbox"/> Confirmation Statement for H&S Documents					
<input type="checkbox"/>	<input type="checkbox"/> H&S screening	NotRequired				
<input type="checkbox"/>	<input type="checkbox"/> Heating/Electric Costs	NotRequired				
<input type="checkbox"/>	<input type="checkbox"/> Hold Harmless statement	NotRequired				
<input type="checkbox"/>	<input type="checkbox"/> Proof of Homeownership	NotRequired				
<input type="checkbox"/>	<input type="checkbox"/> Proof of income	NotRequired				
<input type="checkbox"/>	<input type="checkbox"/> Release of Information	NotRequired				
<input type="checkbox"/>	<input type="checkbox"/> Right to appeal	NotRequired				
<input type="checkbox"/>	<input type="checkbox"/> Section 106 Review	NotRequired				
<input type="checkbox"/>	<input type="checkbox"/> WX 800 Client Application	NotRequired				

Qualification

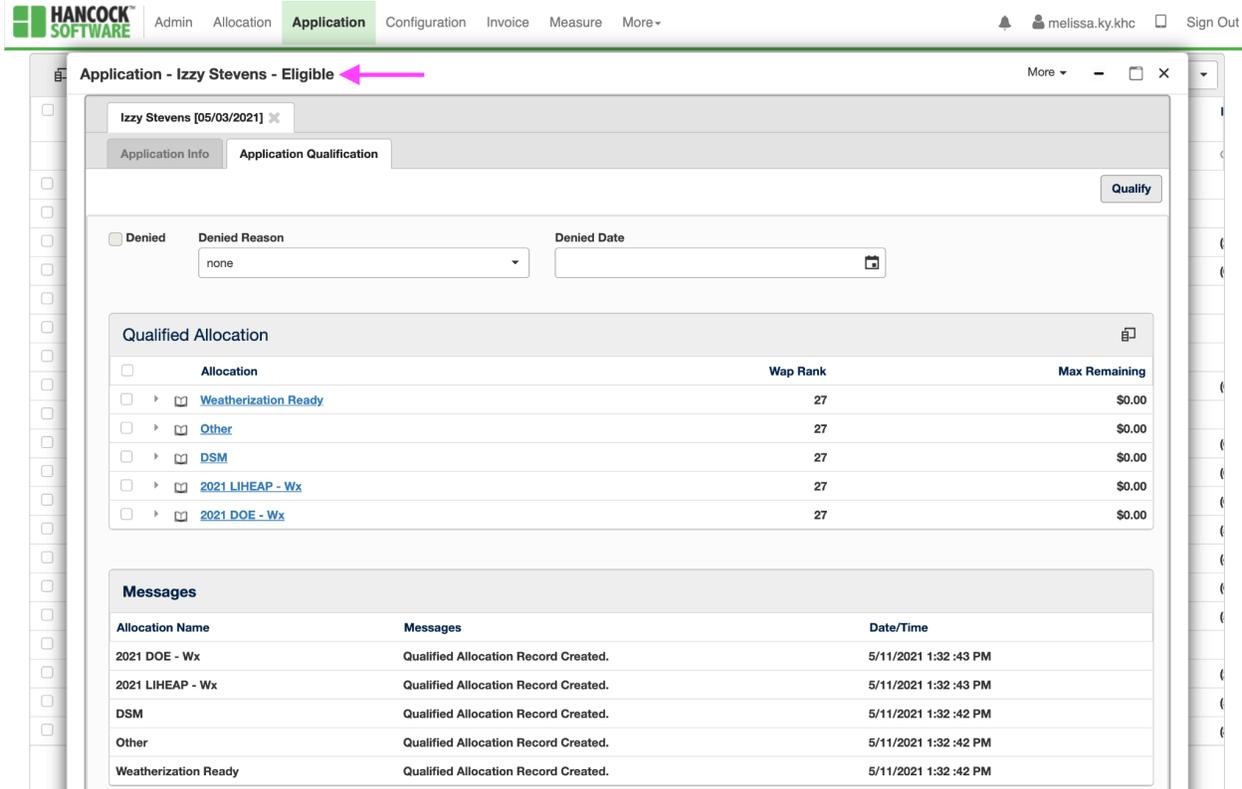
1. Once you have reviewed all data, you will move to the 'Application Qualification' tab, and select 'Qualify':



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':



The screenshot shows the Hancock Software interface for an application titled "Izzy Stevens [05/03/2021]". The application is currently in the "Application Qualification" tab, and its status is "Eligible", as indicated by a pink arrow pointing to the title bar. A "Qualify" button is visible in the top right corner of the application details area.

Below the "Qualify" button, there is a "Denied" section with a "Denied Reason" dropdown menu (set to "none") and a "Denied Date" field.

The "Qualified Allocation" section contains a table with the following data:

Allocation	Wap Rank	Max Remaining
Weatherization Ready	27	\$0.00
Other	27	\$0.00
DSM	27	\$0.00
2021 LIHEAP - Wx	27	\$0.00
2021 DOE - Wx	27	\$0.00

Below the allocation table is a "Messages" section with a table of messages:

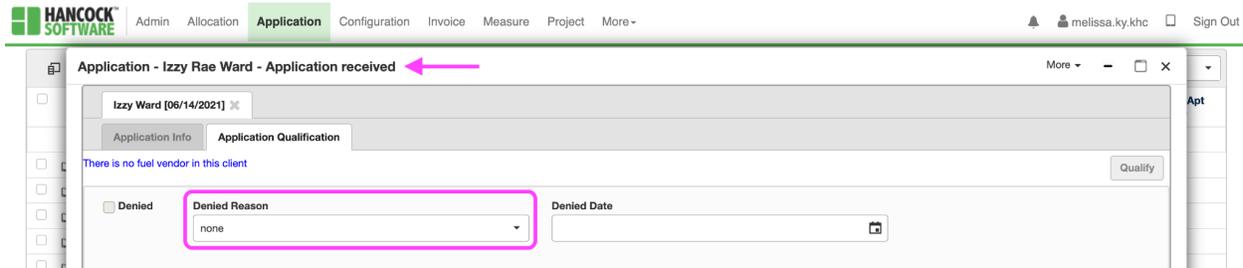
Allocation Name	Messages	Date/Time
2021 DOE - Wx	Qualified Allocation Record Created.	5/11/2021 1:32 :43 PM
2021 LIHEAP - Wx	Qualified Allocation Record Created.	5/11/2021 1:32 :43 PM
DSM	Qualified Allocation Record Created.	5/11/2021 1:32 :42 PM
Other	Qualified Allocation Record Created.	5/11/2021 1:32 :42 PM
Weatherization Ready	Qualified Allocation Record Created.	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.

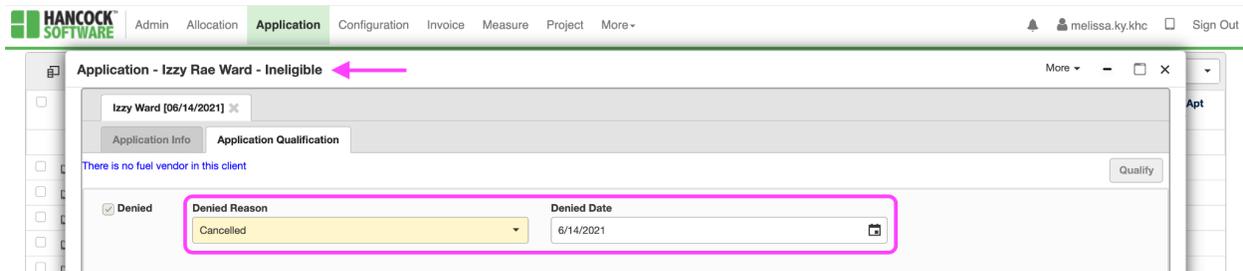
NOTE: Once edits have been made to an application, the data cannot be overwritten.

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:



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



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

