Hancock Software & Mint Mobile User Guide

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About This Guide

This guide covers Hancock Software and its companion field application, Mint Mobile. It is written for new users across all roles from program administrators to field assessors and assumes no prior experience with the platform.

Hancock Cloud is highly configurable. The workflows can vary by program, funding source, or role. Role-specific steps are clearly marked throughout.

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1. Introduction

What Is Hancock Software?

Hancock Software is a cloud-based energy program management platform built to help utilities and their contractor networks run energy efficiency programs from start to finish. It brings together every part of the program workflow — customer applications, eligibility checks, contractor assignments, field work, invoicing, and reporting — into a single system.

Rather than managing programs across disconnected spreadsheets, email chains, and legacy tools, Hancock Software gives every participant in your program a shared, real-time view of the work. Program administrators can track funding and compliance. Contractors can manage their project lists and submit invoices. Field assessors can capture data on-site and sync it back automatically. Everyone works from the same centralized URL.

The platform is highly configurable, meaning it adapts to the specific rules, funding sources, and workflows of your program — without requiring custom software development for most changes.

What Is Mint Mobile?

Mint Mobile is Hancock's companion application for field work. It is designed for energy auditors and installation contractors who need to capture detailed assessment data on-site — often in locations with no internet connection.

With Mint Mobile, field staff can:

- Walk through a guided, step-by-step digital audit
- Record household information, building details, and health & safety findings
- Select and document recommended measures
- Run energy modeling calculations in the field
- Capture electronic signatures and photos
- Generate completed documents (assessment reports, contracts, receipts) before leaving the site
- Sync all data back to Hancock Software when connectivity is restored

Mint Mobile runs on iPad, Windows tablets, and Windows desktops. It is designed to work fully offline, so field staff are never blocked by a poor connection.

Who This Guide Is For

This guide is written for all users of Hancock Software and Mint Mobile, including:

- **Program Administrators** at your utility or program administrator (PA) organization, who oversee funding, compliance, and program-level reporting
- **Energy Efficiency Organizations**, who manage contractor networks, review applications and invoices, and create work orders. Own the end-to-end project workflow — from initial assessment through final invoice
- **Contractors** who receive assigned work orders and record installation activity
- **Field Assessors**, who use Mint Mobile on-site to conduct energy audits and capture assessment data
- **Office Managers and administrative staff** who enter applications, manage scheduling, and support contractor operations

Not every section of this guide applies to every role. Where a task is role-specific, it is clearly marked.

How Hancock Software and Mint Mobile Work Together

Hancock Software and Mint Mobile are two parts of the same system. Hancock Software is the web-based back end where applications are created, projects are managed, work is assigned, and invoices are processed. Mint Mobile is the field-facing front end that puts the most important parts of that workflow into the hands of the person doing the work on-site.

The connection between them works like this:

1. A project is created and scheduled in Hancock Software
2. The assigned field assessor syncs Mint Mobile before heading out — downloading the day's projects to their device
3. The assessor completes the audit on-site using Mint Mobile, working fully offline if needed
4. When the assessor returns (or regains connectivity), they sync Mint Mobile — pushing all captured data back to Hancock Software
5. The project record in Hancock Software is automatically updated with the field data, and the workflow continues from there

This sync-based design means field staff always have what they need, and office staff always see the latest information — without anyone having to re-enter data manually.

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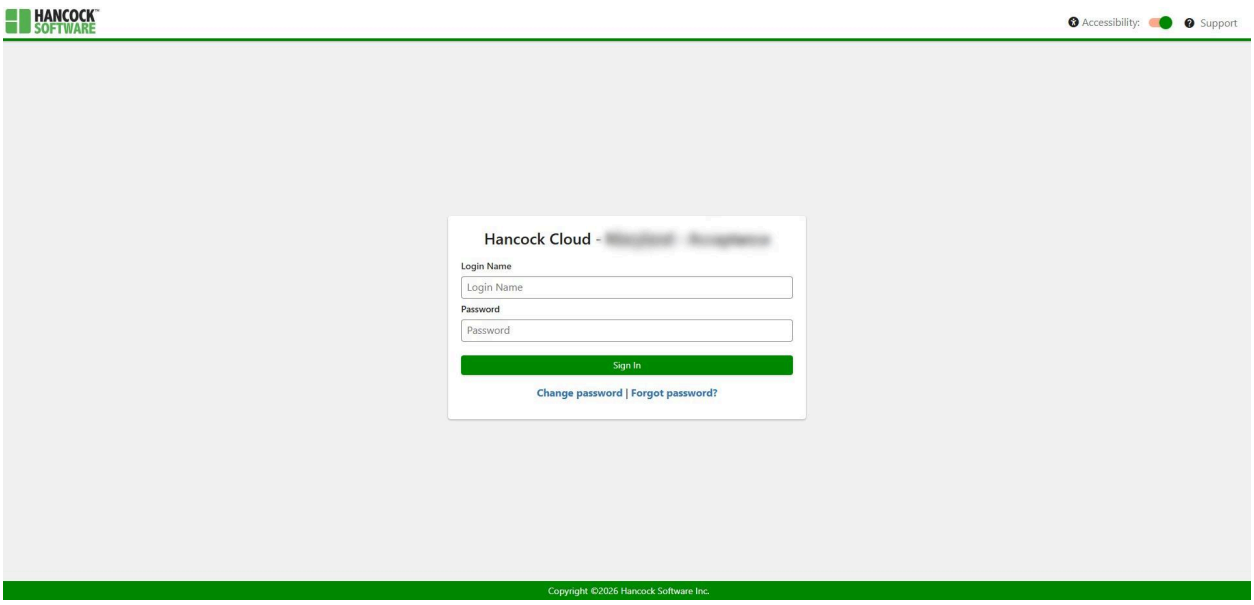
2. Getting Started

Logging In

Hancock Software is accessed through a web browser. Your organization's administrator will provide you with your login credentials and the URL for your program's instance of Hancock Software.



To log in:

1. Open your web browser and navigate to your Hancock Software URL
2. Enter your username and password
3. Click **Log In**

Once logged in, you will land on your home dashboard. What you see here depends on your role — a contractor will see their project list; a program administrator will see a broader program overview.

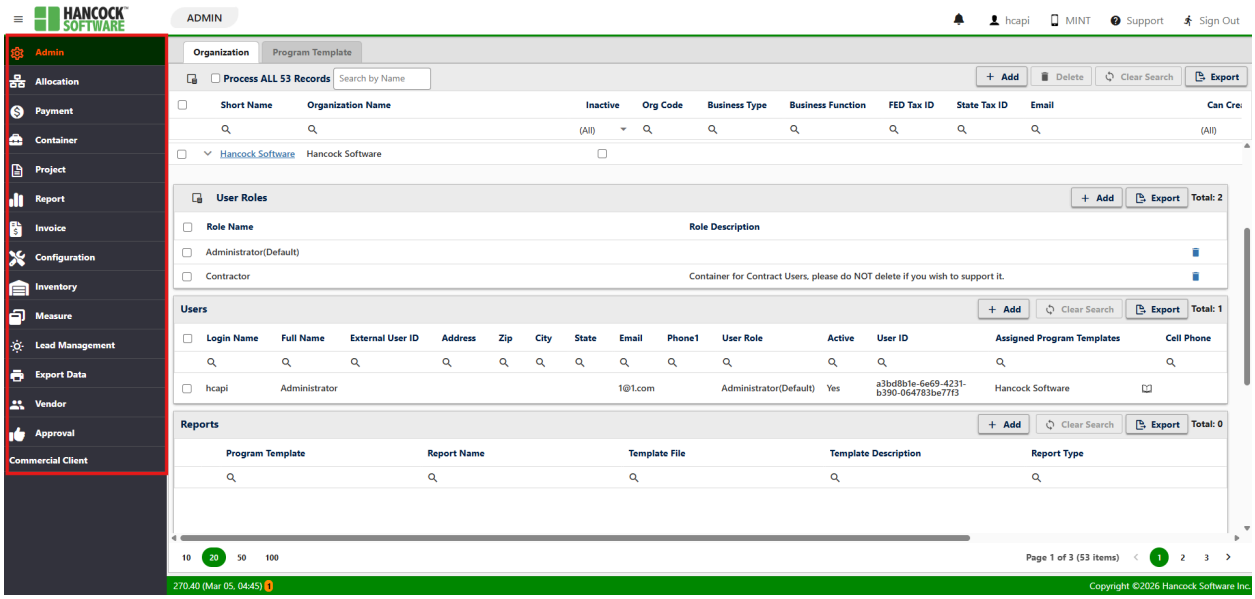
> **Note:** Hancock Software uses separate environments for testing and live work. Your administrator may provide access to a **test** or **acceptance** environment for training purposes. Never use test data in your production environment.

Navigating the Interface

The Hancock Software interface is organized around a main navigation menu. The items you see in the menu depend on your role and organization.

Key areas you will use regularly include:

- **Applications** — where new customer records are created and eligibility is checked
- **Projects** — the central workspace for managing active program work
- **Work Orders** — for assigning and tracking installation tasks
- **Invoices** — for creating and submitting payment requests
- **Reports** — for tracking program performance and funding usage



Customizing Your Grid View

Most list screens in Hancock Software display records in a configurable data grid. You can adjust which columns appear, reorder them, and resize them to match the way you work.

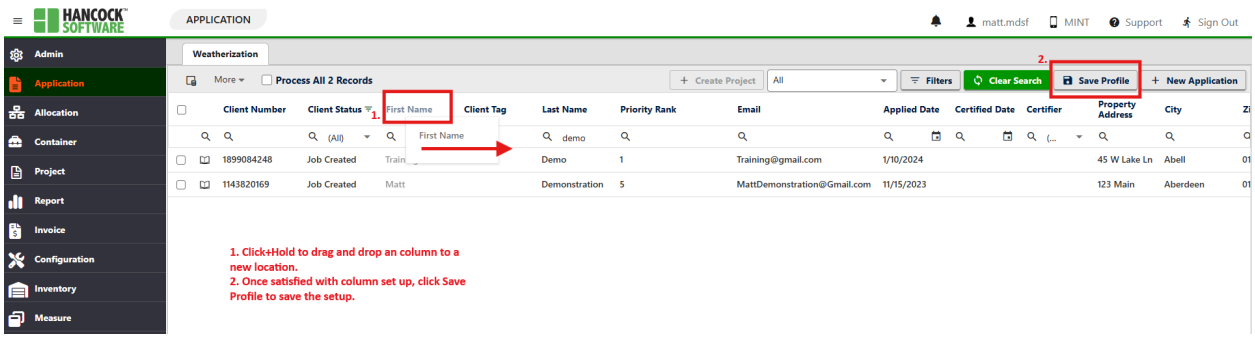
To customize your grid:

1. On any list screen, locate the column header area
2. Right-click a column header (or use the column chooser button, if available) to add or remove columns
3. Drag column headers left or right to reorder them

4. Resize columns by dragging the edge of a column header

To save your grid layout:

1. After arranging your columns, click **Save Profile**
2. Your layout will be saved to your user account
3. The next time you log in, your grid will automatically display your saved arrangement



Tip: Each user has their own saved profile. Customizing your grid does not affect how other users see the same screen.

Understanding Your Role and Access Level

Your access in Hancock Software is determined by two things: your **role** and your **organization**. Together, these control which records you can see and which actions you can take.

- **Role** determines what you can do — create applications, approve invoices, generate reports, and so on
- **Organization** determines which records are visible to you — a contractor only sees their own projects; a program administrator can see everything

If you try to access a screen or take an action and find it unavailable, it is likely outside your role's permissions. Contact your administrator if you believe you need access that you do not currently have.

A full breakdown of roles and their capabilities is covered in **Section 3: Organization Structure & User Roles**.

Setting Up Mint Mobile

If your role involves field work, you will also use Mint Mobile. Setup steps differ slightly depending on your device.

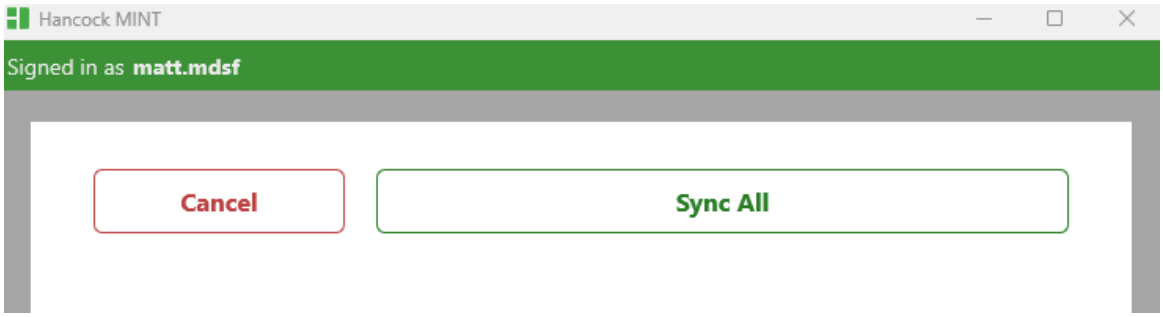
iPad and iOS:

1. Download Mint Mobile from the Apple App Store
2. Open the app and enter your Hancock Software credentials
3. Tap **Sync** to download your assigned projects before heading into the field

Windows tablet or desktop:

1. Install the Mint Mobile application provided by your administrator
2. Launch the app and log in with your Hancock Software credentials
3. Click **Sync** to download your assigned projects

📸 **SCREENSHOT NEEDED:** `02-04_mint-sync-screen.png` — Mint Mobile home screen / sync screen on iPad — Source: Hancock end-to-end transcript.md, near quote: *"sync morning/night before for project download"*



How syncing works:

Mint Mobile downloads projects that are scheduled within a configurable window (typically the next 3 days). Sync your device each morning before heading out and again each evening when you return, to ensure your data is always current.

- **Morning sync (before field work):** Downloads new and updated projects to your device
- **Evening sync (after field work):** Pushes completed assessment data back to Hancock Software

You do not need an internet connection to complete an assessment once your projects have been downloaded. Mint Mobile works fully offline. Just make sure to sync when you are back on a network so your data is uploaded.

> **Tip:** If you have a large number of project photos from a previous sync, you can choose to skip photo downloads during your next sync to save time and storage. Ask your administrator if you need to adjust this setting.

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3. Organization Structure & User Roles

How Hancock Software Is Organized

Hancock Software is built around a three-level organizational hierarchy that mirrors how energy efficiency programs are typically structured: a program administrator at the top, a layer of vendor or contractor energy efficiency organizations in the middle, and field-facing contractors at the base. Every user in the system belongs to one of these levels, and that placement determines what they can see and do.

Level 1: Program Administrator (Your Utility or State Organization)

At the top of the hierarchy sits your utility or program administrator (PA) organization. This is the entity that funds and oversees the program. Users at this level have visibility into all data across all organizations below them — every application, every project, every invoice, every contractor.

Typical responsibilities at this level include:

- Overseeing program funding and compliance
- Creating and managing allocations (funding sources)
- Reviewing and closing allocation invoices
- Accessing program-wide reports and energy savings data

Level 2: Energy Efficiency Organizations (Contractors or Subgrantees)

Energy Efficiency Organizations operate as sub-organizations under your utility or state and are responsible for managing the contractor workforce that delivers program services.

Energy Efficiency organizations typically:

- Review and approve applications
- Create and assign work orders to installation contractors
- Review and approve invoices before they reach the PA
- Manage contractor relationships

Level 3: Contractors

Contractors receive assigned work orders and perform installation of major measures (such as insulation, air sealing, and weatherization). They do not manage the full project — they see only the measures and records relevant to their assigned work orders.

🔨 **Contractors (HPC/IIC):** Your view in Hancock Software is scoped to your organization. You will only see projects and work orders assigned to you or your team — not those belonging to other contractors.

User Roles and Permissions

Within each organizational level, individual users are assigned a **role** that controls which actions they can perform. Roles are assigned by your administrator.

	Organizational Level	Key Capabilities
Program Administrator	Program Administrator / Utility / State	Full system access, allocation management, program reporting
Configuration Administrator	Program Administrator / Utility / State	System setup, rule configuration, picklist management
Energy Efficiency Organization / Agency Admin	Organization / Agency	Application review, work order creation, invoice approval
Office Manager	Organization / Agency	Application entry, scheduling, project management
Contractor User	Contractor Management User	Work order acceptance, measure installation entry, invoice submission
Field Assessor	Organization / Agency	Mint Mobile data entry for on-site assessments
Inspector	Organization / Agency	Inspection questionnaire completion, QA review

Note: Your administrator may configure custom role names for your organization's program. The names in the table above reflect the standard Hancock Software role framework.

Organization-Based Data Visibility

In addition to role-based permissions, data visibility in Hancock Software is controlled by your organization. This means:

- **Program Administrator / State / Utility users** see all data across all organizations and sub-organizations
- **Energy Efficiency Organization users** see all data for their organization and for every contractor beneath them
- **Contractor users** see only the specific work orders assigned to them, and only the measures included on those work orders

This structure ensures that contractors cannot see each other's work, while administrators at every level have the visibility they need to manage the program.

A Note on Roles and Allocations

In Hancock Software, roles are also tied to specific allocations (funding sources). This means a user's ability to perform certain actions — such as creating an invoice against a particular funding source — may be further controlled by whether their role is active for that allocation during a given date range.

If you find that you cannot access a funding source you expect to see, check with your administrator to confirm your role is assigned for that allocation and that the date range is current.

Full details on allocations are covered in **Section 6: Funding Sources & Allocations**.

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4. Applications & Intake

Overview

An application is the starting point for every customer served by your program. It captures the customer's contact information, housing details, and household data needed to determine eligibility — and it creates the record that everything else in Hancock Software is built on.

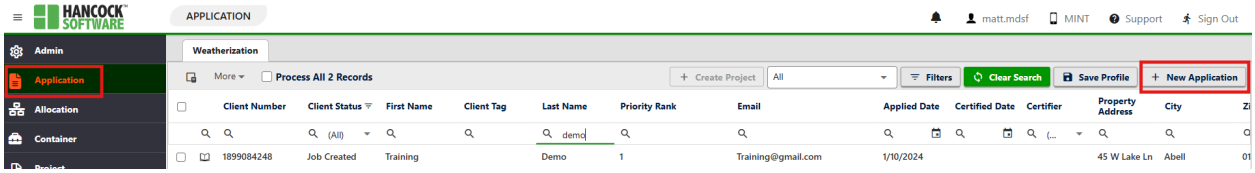
Applications can be created in three ways: entered manually by office staff, imported automatically via API, or submitted directly by customers through a self-service portal. Regardless of how an application enters the system, the record that results is the same.

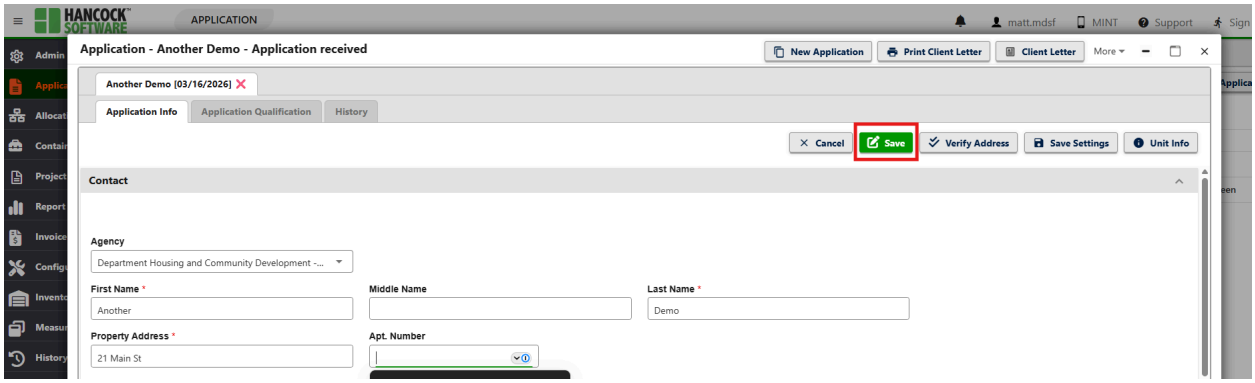
Creating an Application Manually

Manual application entry is performed by office managers or administrative staff.

To create a new application:

1. Navigate to **Applications** in the main menu
2. Click **New Application** (or the equivalent button for your program)
3. Complete the required fields in each section, described below
4. Save the application to generate a record





Application Sections

Contact Information

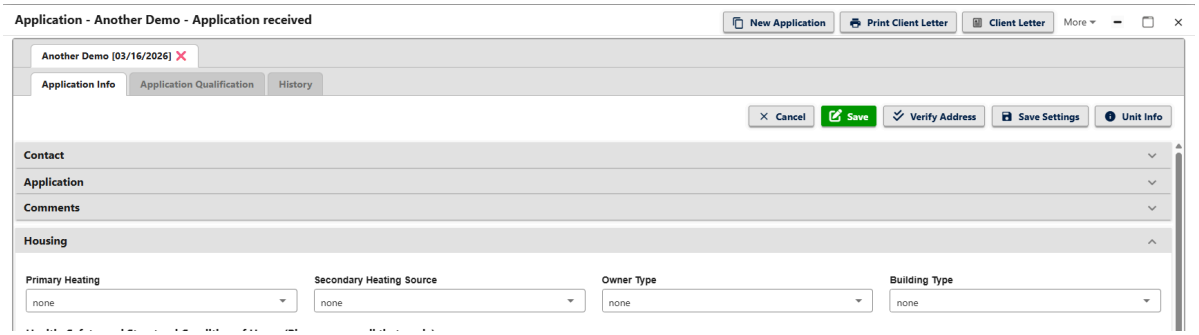
This section captures the customer's name, service address, phone number, and email. The address entered here will be used to look up the customer's utility account in the next step.

Application Details

This section captures program-specific information used to determine eligibility. Common fields include:

- **Housing type** — single family, multifamily, mobile home, etc.

- **Year built** — used to trigger lead paint rules for homes built before 1979
- **Fuel type** — determines which funding allocations the customer may qualify for
- **Ownership status** — whether the customer owns or rents their home



Note: The fields visible in this section are configured for your program. You may see additional or different fields depending on your program's requirements.

Multifamily programs: If the application is for a multifamily property, select the **Unit Info** checkbox in this section. This button allows unit-level demographics to be entered for project-level applications.

Family Grid

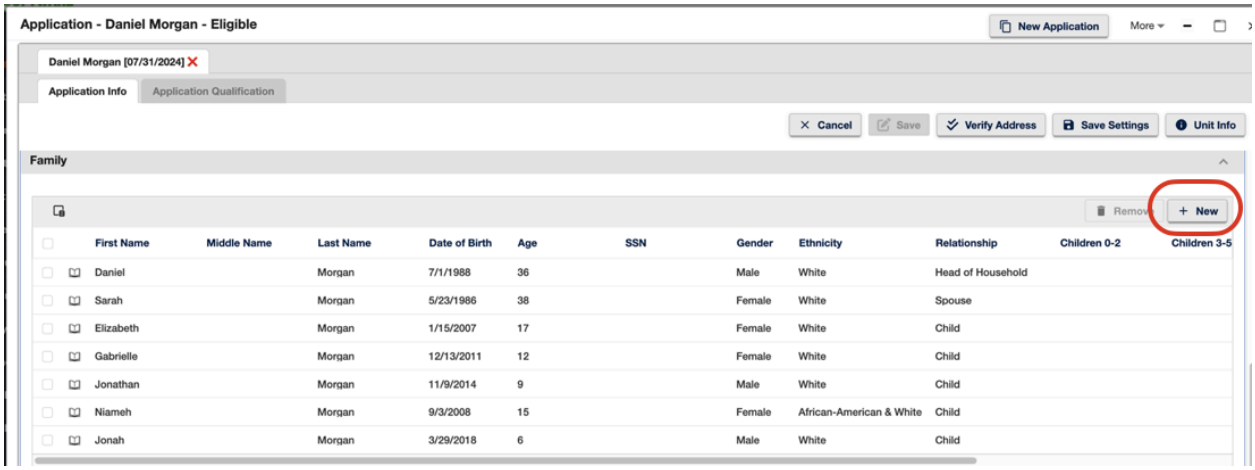
The family grid captures information about everyone living in the household. For each occupant, you can record:

- Name and relationship to the primary account holder
- Date of birth
- Any relevant demographic information required by your program's funding source

This information is used for demographic reporting and compliance with funding source requirements (such as DOE or LIHEAP programs that require household size and income data).

To add a household member:

1. In the Family Grid section, click **Add Row** (or the equivalent button)
2. Enter the occupant's information
3. Repeat for each household member
4. Save when complete



Additional / Custom Fields

Depending on your program, additional sections may appear in the application to capture fields specific to your funding source or reporting requirements. These fields are configured by your administrator and may include dropdown picklists, checkboxes, or free-text fields.

If a field is marked as required, the application cannot be saved without it. If you need a value that does not appear in a dropdown, contact your administrator — picklists can be updated to add new options.

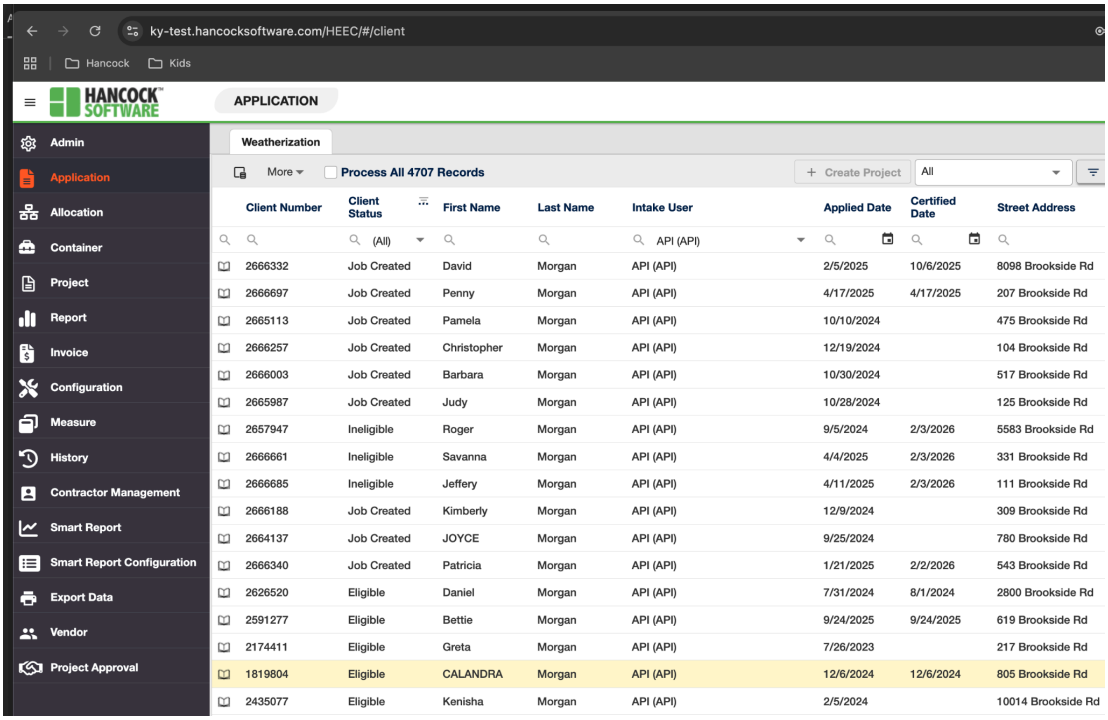
Importing Applications via API

If your organization maintains a separate customer database or uses a third-party intake system, applications can be imported into Hancock Software automatically through an API integration.

With an API import:

- Customer contact information, address, and account data are pre-populated
- The application appears in Hancock Software as if it had been manually entered
- Staff can review and supplement imported data before qualification

This eliminates double entry and ensures that customers already identified as eligible in an external system can begin the workflow in Hancock Software immediately.



Customer Self-Intake Portal

Hancock Software supports a customer-facing portal where applicants can submit their own applications online. The portal can be linked from your state or utility's website, allowing customers to apply without contacting your office directly.

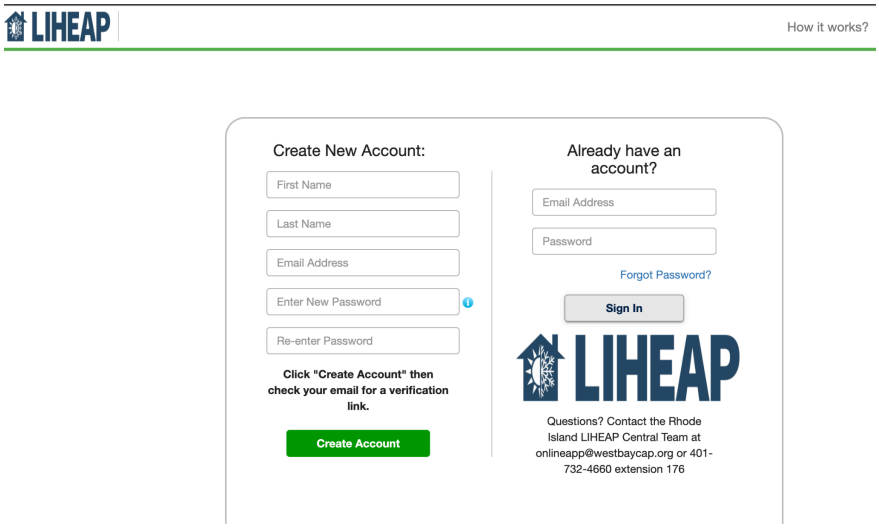
> 🏢 **Program Administrators only:** The self-intake portal is configured and enabled by your Hancock administrator. Contact your Hancock representative to set up or modify the portal for your program.

When a customer submits an application through the portal:

1. Their record is created automatically in Hancock Software
2. Your intake team receives a notification to review the submission
3. Staff validate the application and proceed with qualification

The scope of the self-intake portal — specifically which fields customers can fill out — varies by program configuration. Confirm the exact portal workflow with your Hancock representative.

This video shows how applicants interact with the self intake portal.



5. Qualification & Eligibility

Overview

After an application is created, the next step is qualification — running the application against your program's eligibility rules to determine whether the customer can receive services, and which funding sources (allocations) will cover the work.

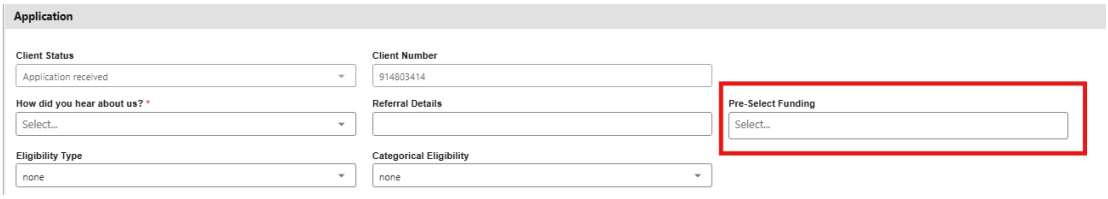
Qualification in Hancock Software is rule-driven. The rules are configured for your specific program and funding sources, so the system does the compliance checking automatically. Your job is to select the appropriate allocations, initiate the check, and review the results.

Step 1: Qualifying and Funding Sources

Before running qualification, you can select which funding sources (allocations) you want to check the application against. If you do not pre-select funding sources then the software will run the qualification for all funding sources. The software is designed that even if an applicant is eligible for one funding source but not another, each funding source is qualified individually and will reflect by showing which is eligible and which is not.

To pre-select funding sources:

1. Open the application record
2. Navigate to the **Pre Select Funding** field
3. Select all funding sources you want to evaluate
4. Proceed to run qualification



Tip: When in doubt, qualify for all allocations that could plausibly apply. The qualification check will determine which ones the customer actually qualifies for. You can always de-select later.

Step 2: Run Qualification

Once funding sources are selected, run the qualification check.

1. Click **Qualify** (or the equivalent button in your program's configuration)
2. The system evaluates the application against all rules for each selected allocation
3. Results are returned per allocation — each will show as **Qualified**, **Not Qualified**, or flagged for review

Qualification checks happen automatically and typically complete in seconds.

Step 3: Review Qualification Results

After qualification runs, review the results for each allocation.

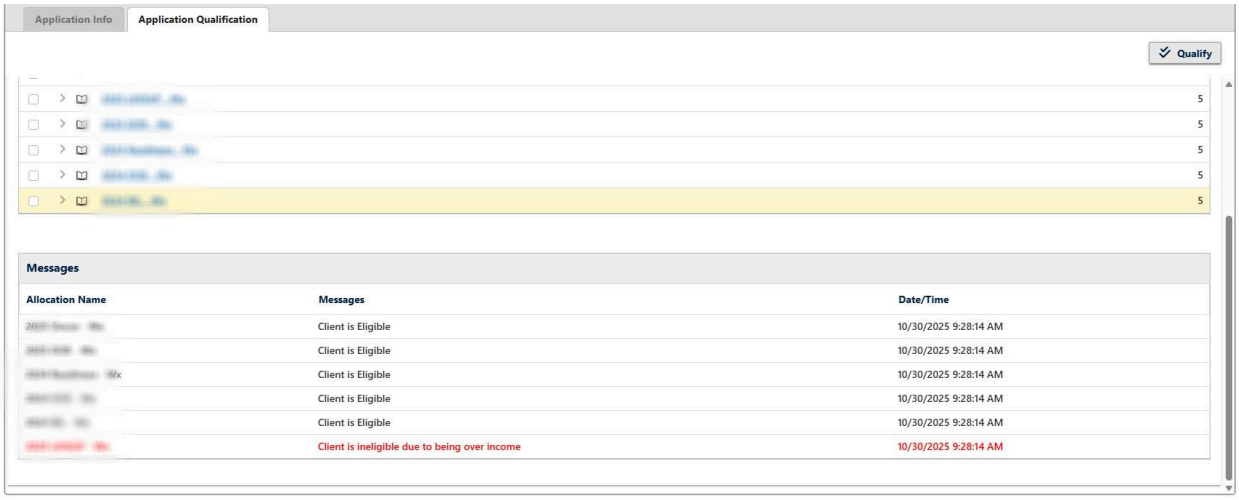
Qualified: The customer meets all eligibility requirements for this funding source. You can proceed to create a project.

Not Qualified: The customer does not meet one or more rules for this funding source. The specific rule that failed will be displayed, giving you context for why.

Common reasons an application may not qualify include:

- Income exceeds the threshold for the funding source
- The customer has received services under this program within the past two years

- Required fields are missing or incomplete
- The service address falls outside the eligible zone for the selected allocation



How Qualification Rules Work

Qualification rules in Hancock Software are written specifically for your program and evaluated automatically at the time of qualification. You do not need to understand the rules themselves to use the system — but it helps to know the types of checks that are being performed.

Common rule categories include:

- **Income rules** — verifying that household income falls within the threshold for a funding source
- **Duplicate rules** — checking whether the customer has already received services recently (typically a two-year lookback)
- **Geographic rules** — confirming the service address falls within the coverage zone for the allocation
- **Field requirements** — ensuring all required application fields are populated before qualification can proceed
- **Funding source-specific rules** — any custom rules defined by your program or funding agency (e.g., WAP rank requirements, DOE compliance checks)

Rules are configured by your Hancock administrator and, for complex logic, by the Hancock professional services team. If you believe a rule is producing incorrect results, contact your administrator rather than attempting to work around it.

💡 **IRA HOMES/HEAR Programs:** Income qualification for IRA-funded allocations uses Area Median Income (AMI) thresholds configured by county and household size. The system automatically calculates eligibility against two tiers: households at or below 80% AMI, and households at or below 150% AMI — each of which unlocks different rebate levels. For multifamily properties, the system evaluates whether at least 50% of units meet the applicable AMI threshold before the building qualifies. Applicants may establish eligibility through categorical eligibility, documented income verification, or self-attestation, depending on your program's configuration. When IRA funds are stacked with state or utility allocations, all program rules are enforced simultaneously — the qualification check will flag any conflicts across funding sources.

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6. Funding Sources & Allocations

What Is an Allocation?

In Hancock Software, a **funding source** is called an **allocation**. An allocation represents a pool of money from a specific funding source — such as a federal weatherization grant, a state energy program fund, a utility rebate budget, or a low-income assistance program — that is available to pay for measures installed in your program.

Every project in Hancock Software is ultimately paid for by one or more allocations. When a contractor submits an invoice, it is billed against the allocation (or allocations) that the project qualifies under.

The Allocation Hierarchy

Allocations follow the same three-level organizational hierarchy as the rest of Hancock Software.

At the top, your program administrator (state or utility organization) holds the master allocation records — this is where the funding is defined and the overall budget is set. Beneath that, agencies and service providers may manage their own sub-allocations, distributing portions of the budget to the organizations below them and tracking spend at each level.

This structure supports programs that blend multiple funding types — for example, a single project might draw from a DOE weatherization grant, a state supplemental fund,

and a utility rebate budget simultaneously. Each allocation tracks its own balance separately.

> 🏢 **Program Administrators only:** Allocation setup and top-level budget management is performed at the PA level. Lead vendors can manage their portion of an allocation budget but cannot create new top-level allocations.

Types of Funding

Allocations in Hancock Software can represent many types of funding, including:

- **Federal funds** — DOE Weatherization Assistance Program (WAP), LIHEAP, LIHEAP Crisis funds, IRA HOMES program funds
- **State funds** — State-level weatherization or energy efficiency program budgets
- **Utility funds** — Rebate budgets managed directly by your utility
- **Leverage funding** — Customer contributions or third-party funds tracked alongside agency funding

> **Note:** Federal and state fund types are typically differentiated by naming convention in your Hancock configuration. Your administrator will establish the naming structure that matches your program's reporting requirements.

> 💡 **IRA HOMES/HEAR Programs:** IRA HOMES (whole-house rebates) and HEAR (electrification rebates) are configured as separate allocations in Hancock Software, each with their own rule sets, budget goals, and incentive structures. HOMES rebates are performance-based and require verified energy savings of 20% or more, supported by modeled or measured savings analysis. HEAR rebates target specific electrification measures. Both can be set up alongside existing state and utility allocations, allowing a single project to draw from IRA and non-IRA funding sources in the same workflow. Contact your Hancock administrator to confirm how your IRA allocations are named and structured.

Allocation Configuration

Each allocation in Hancock Software is configured with a set of properties that govern how it behaves throughout the workflow.

Basic Settings

- **Name** — A descriptive label for the funding source (e.g., "DOE WAP FY2026")
- **Start and end dates** — The period during which this allocation is active; work outside this window cannot be invoiced to the allocation

- **Participation goal** — The number of households your program aims to serve from this allocation

Budget Types

Each allocation can have its budget broken down into categories, such as:

- Normal / administrative
- Financial health
- Safety and liability
- Program support costs

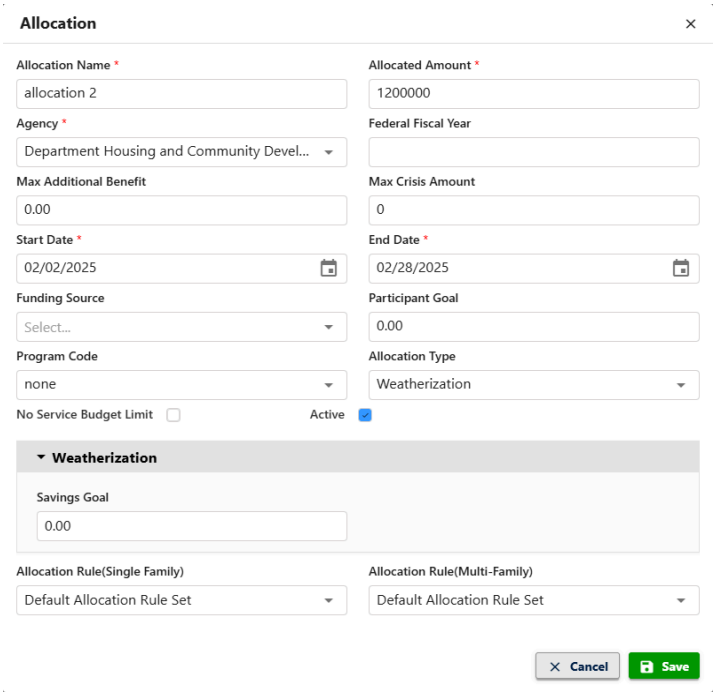
Budget type breakdowns are configured per allocation and support detailed financial tracking and reporting.

> 🏢 **Program Administrators only:** Budget type configuration is set during allocation setup. Contact your Hancock administrator if you need to add or modify budget categories for an existing allocation.

Rule Sets

Every allocation is assigned a **rule set** — the collection of eligibility and validation rules that govern which customers qualify for that funding source and what work is eligible to be invoiced against it.

Rule sets are typically set up by the Hancock professional services team in collaboration with your program staff. Once established, they can be copied from year to year (with modifications) as your program renews funding cycles.



Contractor Role Assignments

Allocations also control which contractors are authorized to perform work under that funding source, and during what period. Each contractor role is assigned a start and end date within the allocation — if a contractor's role expires, the system will prevent them from being assigned new work against that allocation.

Managing Allocation Budgets

As work is completed and invoices are approved, allocation budgets are drawn down in real time. You can view the remaining balance of any allocation from the allocation detail screen.

🏢 **Program Administrators only:** You can add additional budget to an allocation or adjust budget type breakdowns at any time before the allocation closes. Once an allocation's status is set to closed, no further invoicing is permitted against it.

🔒 **Lead Vendors only:** You can view the available budget for allocations under your organization and track spend at the contractor level. Contact your PA administrator to request budget adjustments.

Multifamily and IRA programs: When braiding federal IRA funds with state or utility funds on multifamily projects, Hancock Software can be configured to

collect **Davis-Bacon Act compliance data** as part of the project record. This includes tracking prevailing wage documentation for contractors performing work on federally funded projects. If your program blends IRA HOMES funds with other federal sources on multifamily buildings, confirm with your Hancock administrator whether Davis-Bacon data collection fields are enabled for your allocations.

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7. Project Management

What Is a Project?

A project is created from a qualified application and represents all of the work that will be performed for a single customer under your program. It is the central record in Hancock Software — everything that happens after qualification (scheduling, field work, work orders, inspections, and invoicing) is attached to the project.

One application can result in one project. That project will contain all the measures to be installed, all documents generated, all invoices submitted, and the full history of who did what and when.

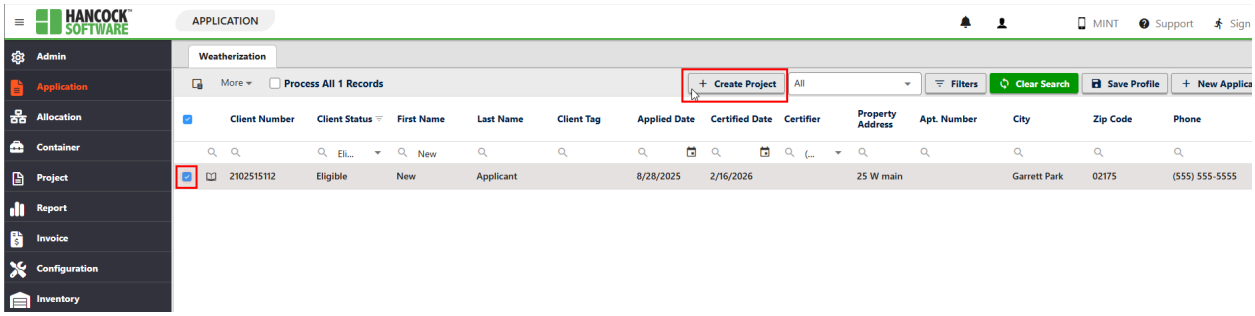
Creating a Project

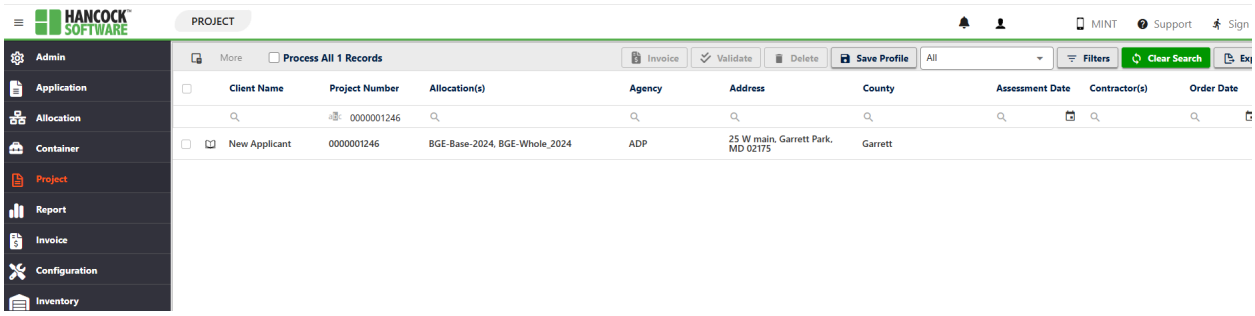
Once an application has been qualified against at least one allocation, a project can be created.

To create a project from a qualified application:

1. Open the qualified application record
2. Click **Create Project**
3. Confirm the funding source(s) the project will draw from — these are pre-populated based on qualification results
4. The project record is created and appears in your project list

📸 **SCREENSHOT NEEDED:** `07-01_create-project-button.png` — "Create Project" button on a qualified application, and the resulting new project record — Source: Hancock end-to-end transcript.md, near quote: *"projects created from eligible applications…projects inherit eligible funding sources from application qualification"*





Project Statuses

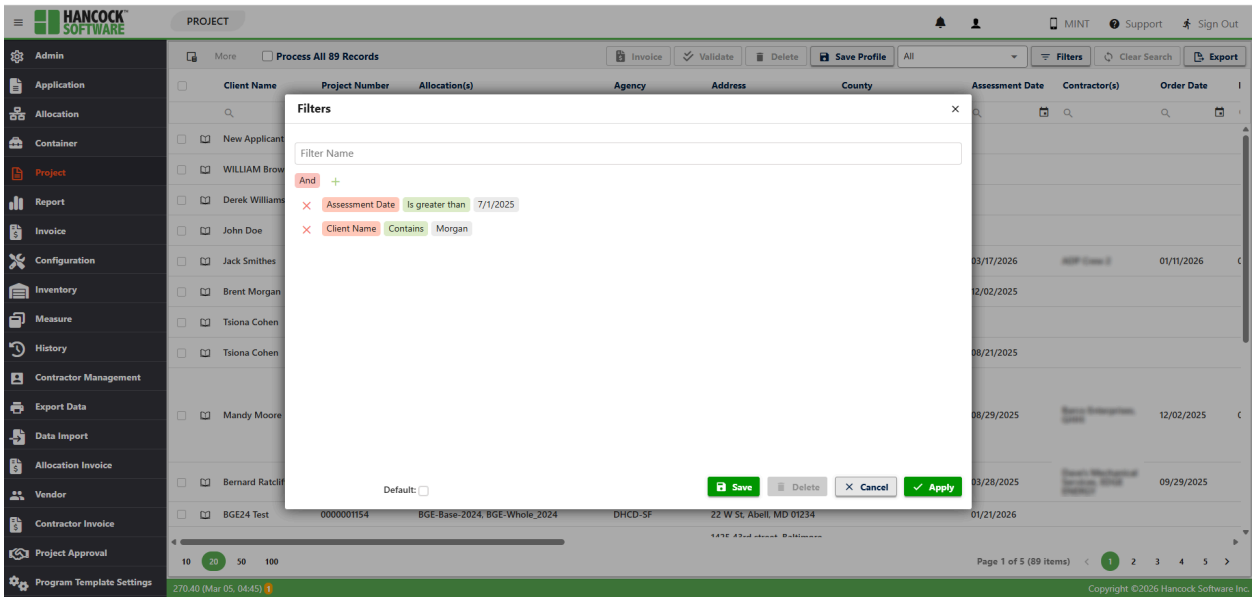
Every project moves through a series of statuses that reflect where it is in the workflow. The exact status names may vary slightly depending on your program configuration, but the general progression is:

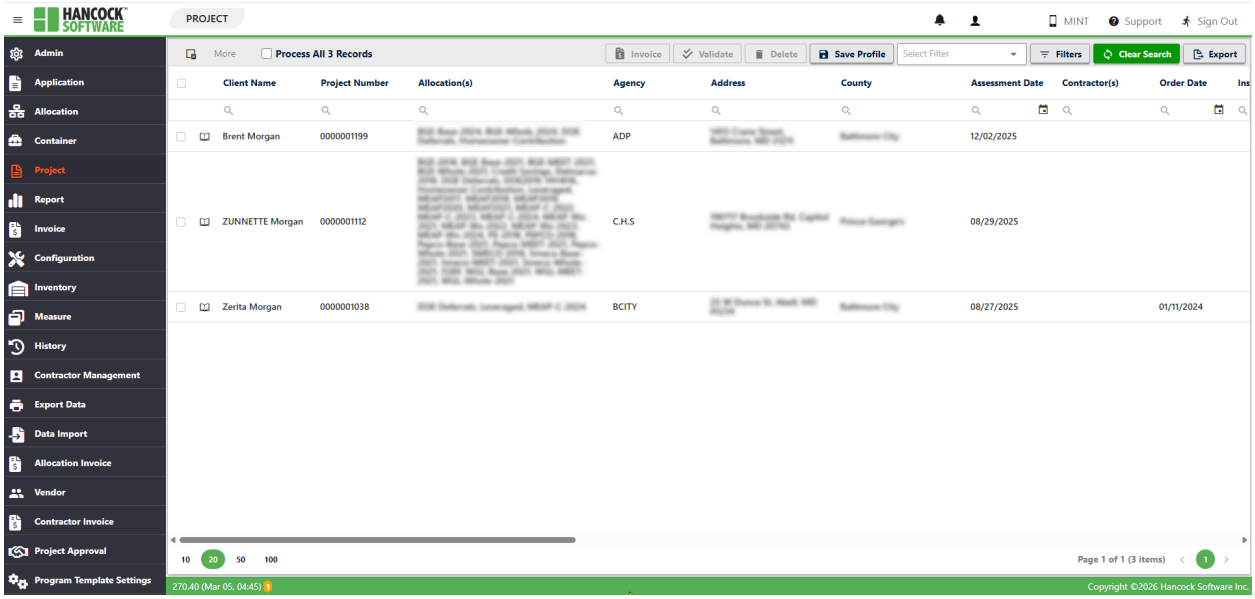
Status	What It Means
Created	Project has been created; no field work has begun
In Progress	Assessment or installation is underway
Pending Review	Work is complete and awaiting lead vendor or PA review
Approved	All reviews passed; ready for invoicing
Completed	All invoices have been submitted and approved
Deferred	Work cannot proceed; a deferral reason has been recorded
Cancelled	Project will not be completed

Use the status to quickly understand where a project stands and what the next action should be.

Filtering and Working Your Project List

Your project list can contain hundreds or thousands of records. Hancock Software provides filtering tools to help you focus on the work that needs your attention right now.





Common filter combinations:

- **Status = Created + No scheduled assessment** → Projects ready to schedule
- **Status = In Progress + Assessment complete** → Projects ready for work order creation
- **Status = Pending Review + All inspections complete** → Projects ready for approval
- **Condition = Roadblock identified** → Projects that cannot proceed until an issue is resolved

You can save frequently used filter combinations as named views so you do not have to rebuild them each time.

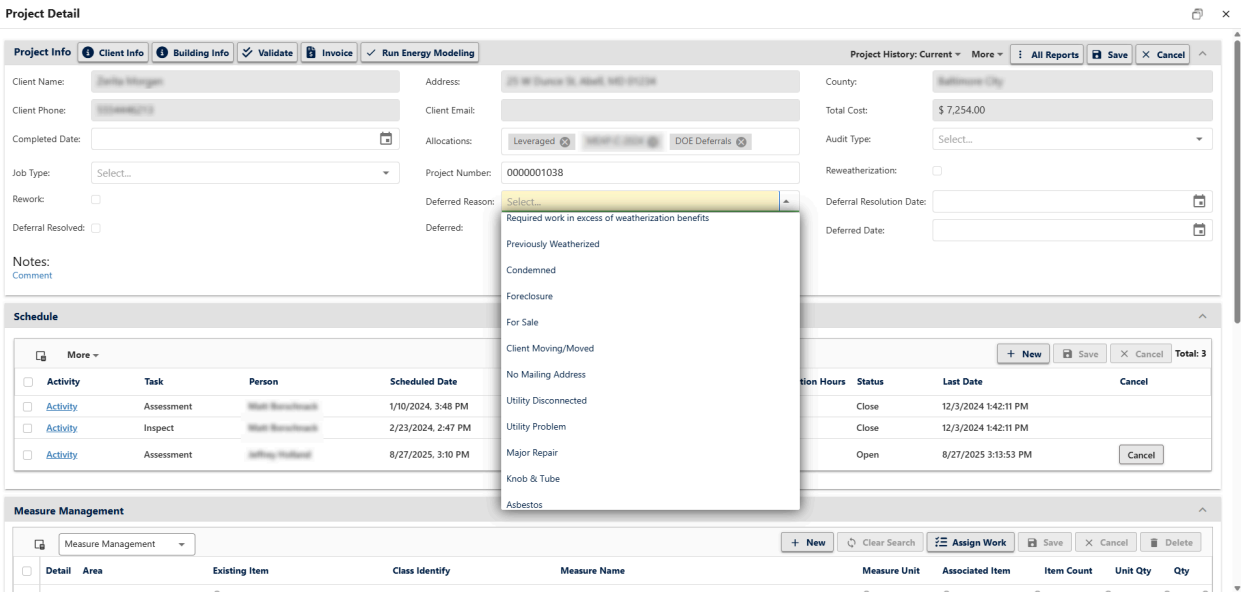
> 🔒 **Lead Vendors only:** Use the **Ready for Operations Review** and **Failed Tech Review** saved views to manage your review queue efficiently.
>
> 🔨 **Contractors (HPC/IIC):** Your project list is already scoped to your organization — you only see your own work. Use status filters to separate active projects from completed ones.

Managing Deferrals

A deferral occurs when a project cannot proceed to completion — typically because conditions at the home make it unsafe, ineligible, or impractical to perform the work at this time.

When a project is deferred, a **deferral reason** must be recorded. Deferral reasons are drawn from a standardized list configured for your program. Common deferral reasons include structural hazards, occupant health conditions, pending landlord approval, or the customer declining service.

> 📸 **SCREENSHOT NEEDED:** `07-03_deferral-reason-selection.png` — Deferral reason selection screen on a project record — Source: Hancock end-to-end transcript.md, near quote: *“deferral reason tracking and reporting…configurable deferral reason picklists”*



To defer a project:

1. Open the project record
2. Navigate to the **Deferral** section
3. Select the appropriate deferral reason from the dropdown
4. Add any relevant notes
5. Save — the project status will update to **Deferred**

Deferrals are tracked and reportable. Your program administrator may use deferral data to identify systemic barriers in the program and adjust outreach or eligibility strategies accordingly.

> **Note:** Deferral reason lists are standardized at the program level. If you encounter a situation that does not match any available reason, contact your administrator — the list can be updated to add new options. DOE deferral taxonomy templates are also available as a starting point for programs that follow federal weatherization guidelines.

Roadblocks and Pre-Weatherization

A **roadblock** is a specific condition found during an energy assessment that prevents major weatherization measures from being installed until the condition is resolved. The most common example is the presence of knob-and-tube wiring, which must be addressed before insulation can be added.

When a roadblock is identified (typically flagged during a Mint Mobile assessment), the project is marked accordingly and cannot advance to major measure installation until one of two pathways is completed.

Pathway 1: Pre-Weatherization

Pre-weatherization work is customer-funded electrical or structural repair that clears the roadblock. The customer arranges and pays for this work independently.

Workflow:

1. Roadblock is flagged during assessment (automatically or manually)
2. Customer is informed and arranges the necessary repairs
3. Once repairs are complete, staff update the project to clear the roadblock
4. Major measure installation can now proceed

Pathway 2: Facilitated Services

In some programs, the program itself facilitates the resolution of certain roadblocks rather than leaving it entirely to the customer.

> 🏢 **Program Administrators only:** Whether facilitated services are available, and under what terms, is determined by your program configuration. Contact your Hancock administrator to confirm the pathways enabled for your program.
>
> **Multifamily programs:** Roadblock resolution in multifamily buildings can affect multiple units. If a building-wide electrical issue is identified, the roadblock may need to be cleared at the building level before any units can proceed to major measure installation.

Attaching Documents to a Project

Supporting documents — such as signed contracts, inspection reports, photos, and lead paint disclosures — can be uploaded directly to a project record in Hancock Software.

To upload a document:

1. Open the project record
2. Navigate to the **Documents** section
3. Click **Upload** and select the file from your device
4. The document is attached to the project and accessible to all users with visibility into that project

Multiple documents can be uploaded to a single project. Documents uploaded from Mint Mobile (such as assessment reports and signed contracts) will appear here automatically after a sync.

> 🔒 **Lead Vendors only:** During your invoice review, use the Documents section to verify that all required paperwork is present before approving an invoice. Missing or unsigned documents are a common reason for invoice rejection.

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8. Scheduling

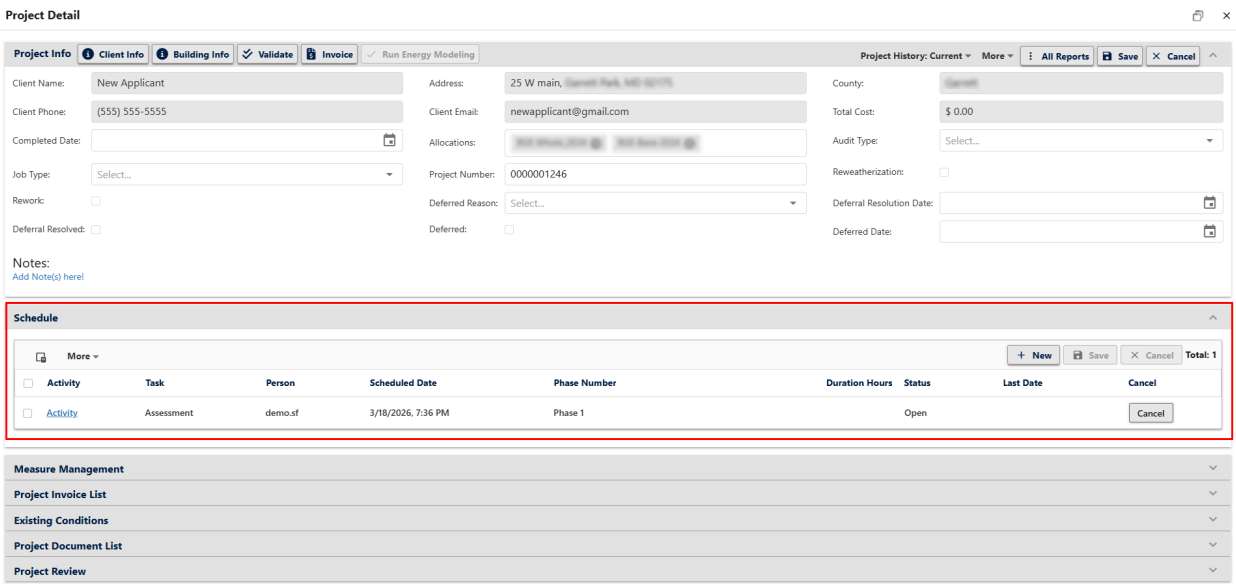
Overview

Scheduling in Hancock Software connects a customer's project to the field staff who will perform the work. An assessment — the on-site energy audit — must be scheduled before field work can begin and before Mint Mobile will download the project to a field assessor's device.

Scheduling can be done manually by office staff, or automated through an API integration with a third-party scheduling system your organization already uses.

Scheduling an Assessment

> 📸 **SCREENSHOT NEEDED:** `08-01_schedule-assessment-screen.png` — Assessment scheduling screen on a project record showing date, time, and assessor assignment fields — Source: Hancock end-to-end transcript.md, near quote: *"office workers schedule assessments in Hancock"*



To schedule an assessment on a project:

1. Open the project record
2. Navigate to the **Scheduling** or **Assessments** section
3. Select the assessment type (see below)
4. Enter the scheduled date and time
5. Assign the field assessor responsible for the visit
6. Save — an automated confirmation email will be sent if your program has email triggers configured

Once an assessment is scheduled and saved, the project will be included in the next Mint Mobile sync for the assigned assessor (within the configured download window, typically 3 days out).

> 🔨 **Contractors (HPC/IIC):** If your organization uses a third-party scheduling tool that is integrated with Hancock Software, assessments may appear on your project automatically without manual entry. Confirm your scheduling workflow with your office manager.

Assessment Types

Hancock Software supports several types of scheduled visits, each serving a distinct purpose in the program workflow:

Assessment Type	Purpose
Energy Audit	Initial on-site assessment; the primary field visit where Mint Mobile is used to collect all home data
QC Inspection	Quality control visit to verify work completed by a contractor
State Monitor Inspection	Regulatory compliance visit conducted by a program administrator or state monitor
Re-inspection	Follow-up visit after a rejected or failed inspection

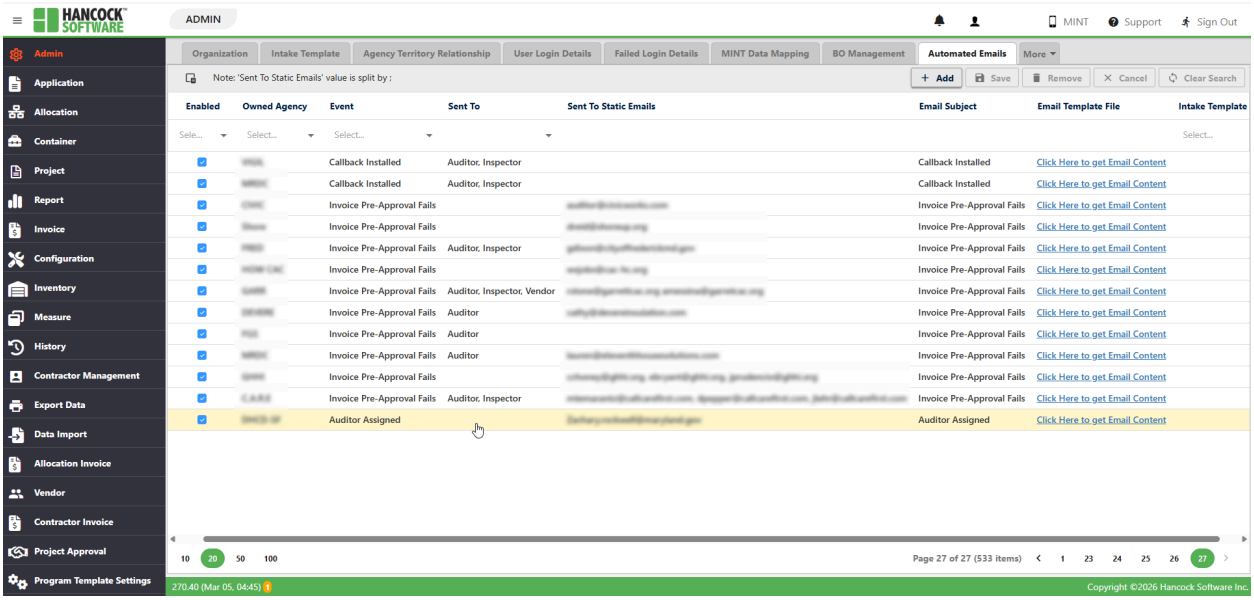
Multiple visit types can be scheduled on the same project simultaneously — for example, an emergency repair can be scheduled alongside a pending audit without conflict.

> **Multiple Visit Scheduling:** Projects may require multiple assessment visits across different units or building areas. Each visit can be scheduled independently and synced to separate field assessors. All visit data rolls up into a single project record.

Automated Email Notifications

Hancock Software can send automated emails at key points in the scheduling workflow — confirming appointments with customers, reminding contractors of upcoming visits, and alerting staff when a project has gone too long without activity.

> 📸 **SCREENSHOT NEEDED:** `08-02_email-trigger-config.png` — Email trigger configuration screen showing event type, conditions, and template assignment — Source: Hancock end-to-end transcript.md, near quote: *“automated email triggers for scheduled appointments…email content templates customizable”*



Email triggers are configured by your administrator and can be set up for events such as:

- Assessment scheduled → send confirmation to customer
- Assessment scheduled → send notification to assigned assessor
- Work order assigned → notify contractor
- No activity within 90 days → send reminder to office manager

Each trigger has a customizable email template. The content, subject line, and recipients are all configurable per event type.

> 🏢 **Program Administrators only:** Email trigger configuration is managed in the Administration section. You can add, edit, or disable triggers at any time. An email log in the Reports section records every automated message sent, including the triggering event, recipient, and timestamp.

API Integration with Third-Party Scheduling Systems

If your organization uses a dedicated scheduling platform, it can be connected to Hancock Software through an API integration. When an appointment is created in the external system, it is automatically written to the corresponding Hancock project — no double entry required.

API scheduling integrations are set up by the Hancock professional services team. Contact your Hancock representative if you want to connect an existing scheduling tool.

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9. Mint Mobile: Field Assessments

Overview

Mint Mobile is the field application used by assessors to conduct on-site energy audits, document installed measures, and capture all the data that flows back into Hancock Software. It runs offline, walks assessors through a structured checklist, and handles everything from household data collection to signature capture and document generation — all in a single visit.

Mint Mobile operates in three modes, each designed for a different phase of field work:

Mode	Used By	Purpose
Assessment	Field assessors (HPCs)	Conducting energy audits and direct install work
Installation	Installation contractors (IICs)	Recording installed major measures on-site
Inspection	Inspectors / QC staff	Comparing completed work against the original audit; accepting or rejecting measures

This section covers the **Assessment** mode in detail. Installation mode is described in Section 11 and Inspection mode in Section 12.

Before You Head Out: Morning Sync

Before leaving for the field each day, sync Mint Mobile to download your assigned projects.

> 📱 **Mint Mobile (field assessors):** A project will only appear on your device if it has been scheduled within the download window (typically the next 3 days) and the sync has been completed. Always sync before you lose connectivity.

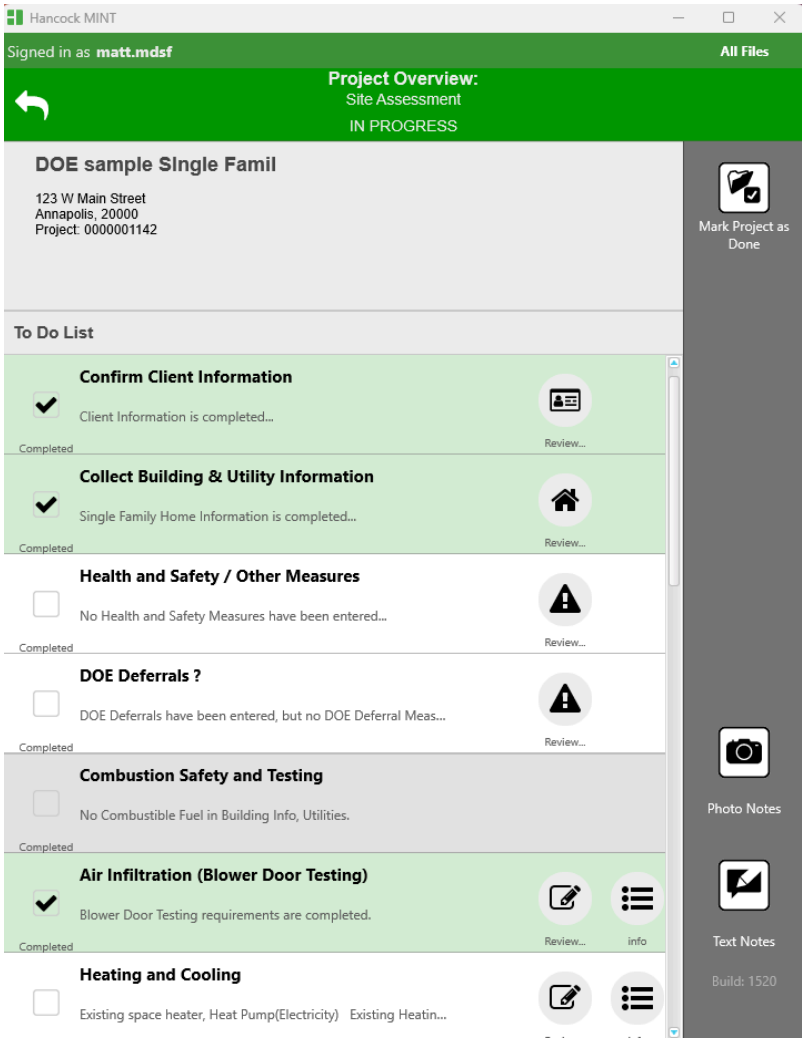
To sync before field work:

1. Open Mint Mobile on your device
2. Tap **Sync** on the home screen
3. Wait for the sync to complete — your assigned projects for the day will download to your device
4. You are now ready to work offline

> **Tip:** If you have photos from a previous session that have not yet uploaded, they will be pushed to Hancock Software during this sync. You may optionally skip downloading photos from previous projects to save time and storage.

Navigating the To-Do List

When you open an assigned project in Mint Mobile, you are presented with a **To-Do List** — a guided, step-by-step checklist of every task required to complete the assessment. Each step must be completed in sequence before the next one unlocks.



The exact tasks on your To-Do List are configured for your program. A typical sequence includes:

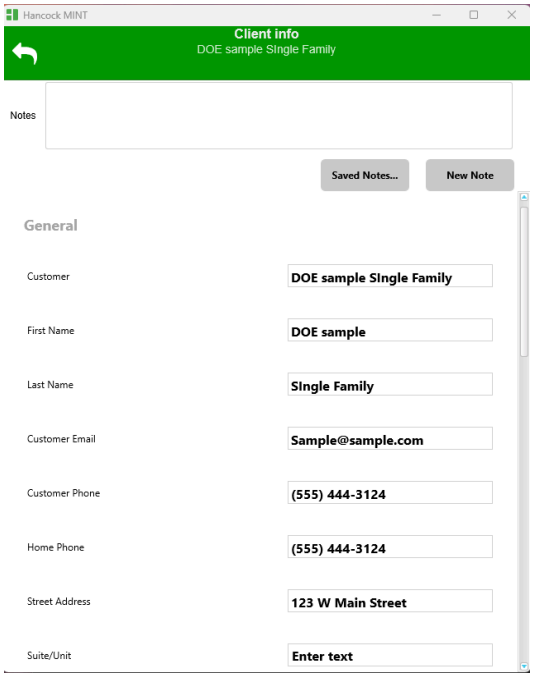
1. Confirm customer information
2. Complete building information
3. Health & safety questionnaire
4. Measure selection and documentation
5. Capture photos
6. Obtain electronic signatures
7. Generate and review documents
8. Mark assessment complete

📱 **Mint Mobile (field assessors):** If you need to go back and edit a previous step, tap the step name in the To-Do List to reopen it.

Step-by-Step: Completing an Assessment

1. Confirm Customer Information

The first task confirms the customer's contact details, address, and account information that were entered during application intake. Review and correct any errors before proceeding.



Key fields to confirm:

- **Owner/occupant status** — If the customer owns the home, landlord fields will be hidden. If they rent, landlord contact information fields will appear.
- **Fuel type** — Confirms which utility accounts are associated with this home. This drives measure allocation and pricing downstream.
- **Home built date** — If the home was built before 1979, lead paint check fields will be triggered later in the assessment.

2. Building Information

This section captures the physical characteristics of the home needed for energy modeling and measure eligibility.

Fields typically include:

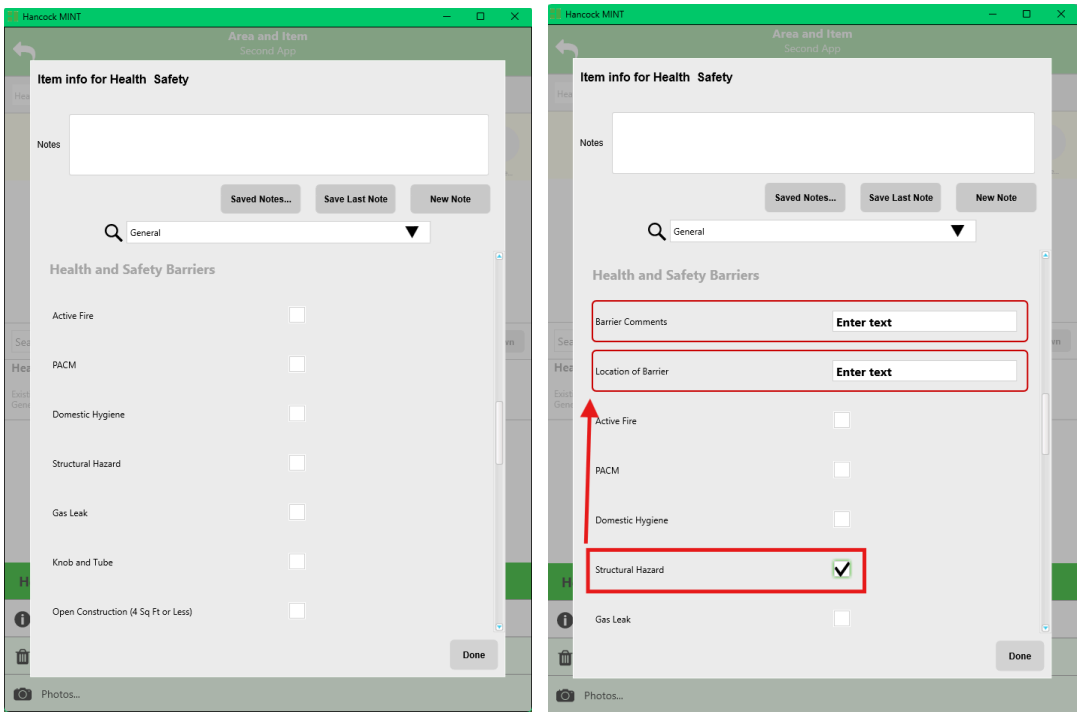
- Building type, size, and number of stories
- Heating and cooling system types
- Insulation levels (existing)
- Window and door details
- Number of occupants

Conditional logic controls which fields appear — for example, selecting “heat pump” as the heating system will display different follow-up fields than selecting “gas furnace.”

> **Multifamily programs:** For multifamily projects, building information may be collected at both the unit level and the building level. Your program configuration determines which fields apply to individual units vs. the whole building.

3. Health & Safety Questionnaire

The health and safety section documents any conditions in the home that could affect occupant safety or the eligibility of weatherization measures.



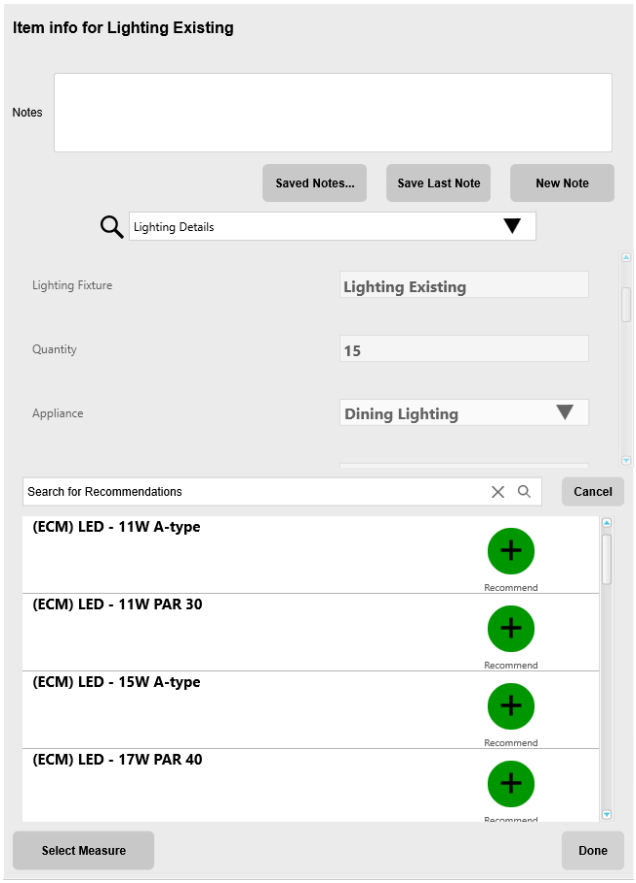
As you check items in this section, additional fields appear automatically. Common triggers include:

- **Knob-and-tube wiring detected** → Roadblock checkbox appears; pre-weatherization eligibility checkbox appears
- **Carbon monoxide risk** → Additional documentation fields appear
- **Structural hazard identified** → Deferral pathway opens

Complete all items honestly. Health and safety findings carry compliance and liability implications, and the data flows directly into the project record in Hancock Software.

4. Measure Selection — Direct Install Measures

Direct install measures (also called ISMs — Installed Measures) are small energy efficiency upgrades installed by the assessor during the visit itself: faucet aerators, LED bulbs, door sweeps, weatherstripping, advanced power strips, and similar items.



To record a direct install measure:

1. Locate the measure in the direct install list
2. Enter the quantity installed
3. Check the **Installed** checkbox for each completed item
4. The install date is automatically recorded as today's date

Measures not installed should be left unchecked. If a measure cannot be installed (e.g., wrong fitting, customer declines), note it in the comments field.

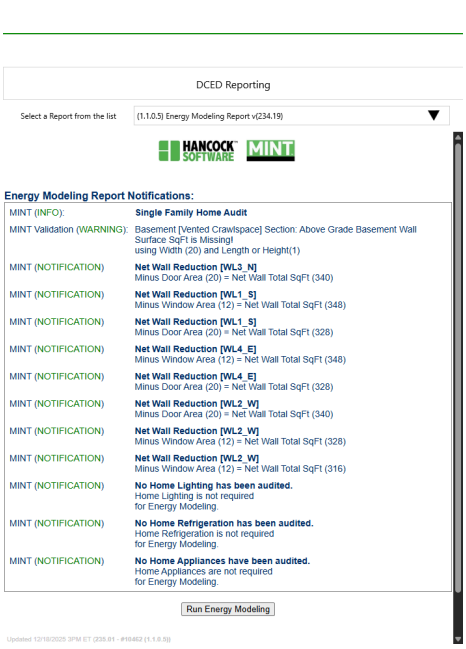
Major measures — larger upgrades such as air sealing, insulation, or HVAC replacements — are also selected during the assessment, but they are not installed at this stage. They are recommended in the assessment record and installed later by a separate contractor via a work order.

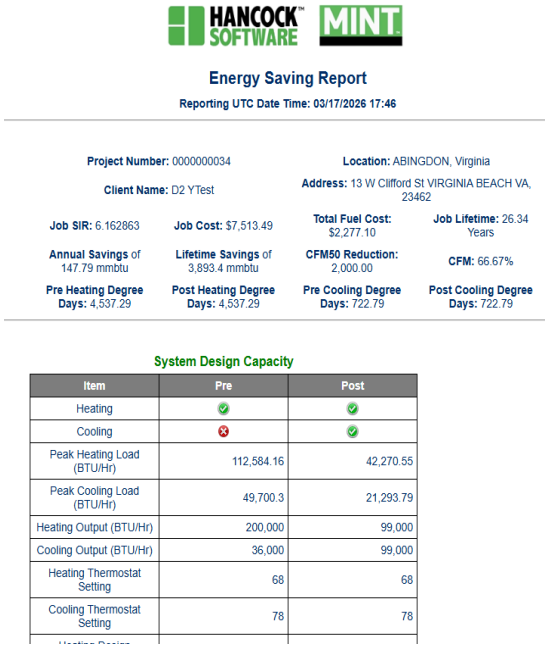
> 💡 **IRA HOMES/HEAR Programs:** When your project is associated with an IRA HOMES or HEAR allocation, Mint Mobile will display the applicable HOMES or HEAR rebate measures alongside your standard program measures. Incentive

amounts for these measures are calculated based on modeled energy savings and the household's AMI tier.

5. Energy Modeling

After building data and measures have been entered, Mint Mobile can run energy modeling calculations offline to estimate the energy savings from the proposed measures.





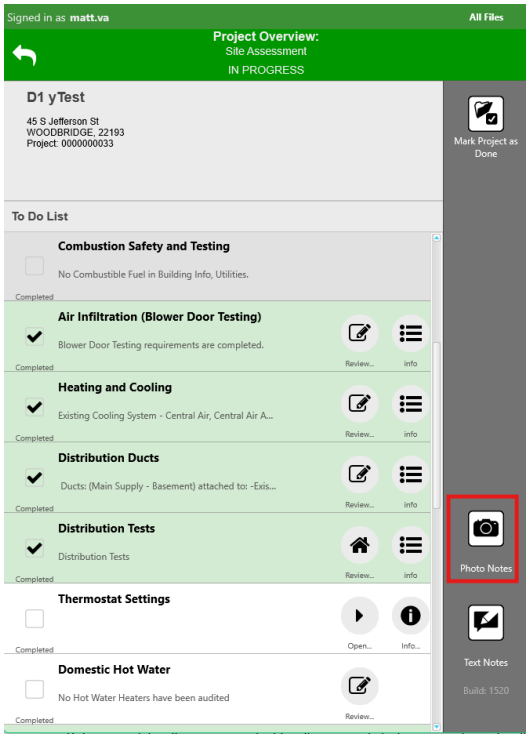
The energy model uses:

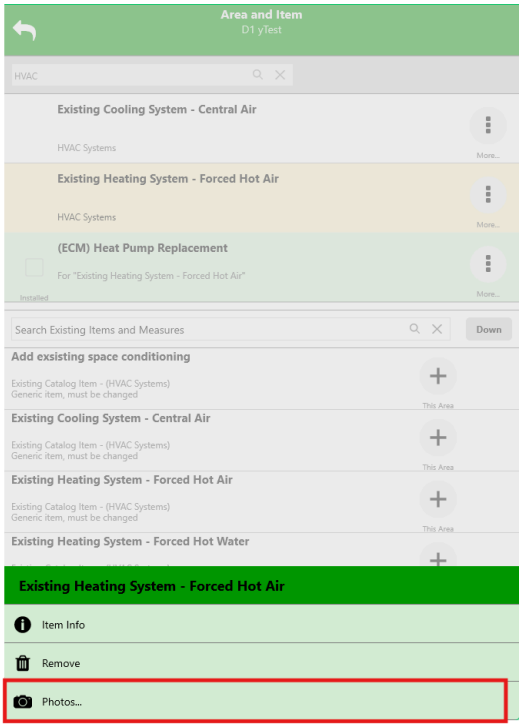
- Home characteristics captured earlier in the assessment
- Actual or estimated utility usage data
- DOE/NREL verified calculation methods (BPI-2400 compliant)
- Your organization's utility-specific price sets (loaded during sync)

Results are displayed as a dynamic proposal showing projected energy savings and estimated costs for each recommended measure. This can be reviewed with the customer on-site.

6. Capture Photos

Photos are attached to specific items or to the project as a whole. They create the visual record that supports invoice review, QA inspections, and regulatory compliance.





To capture a photo:

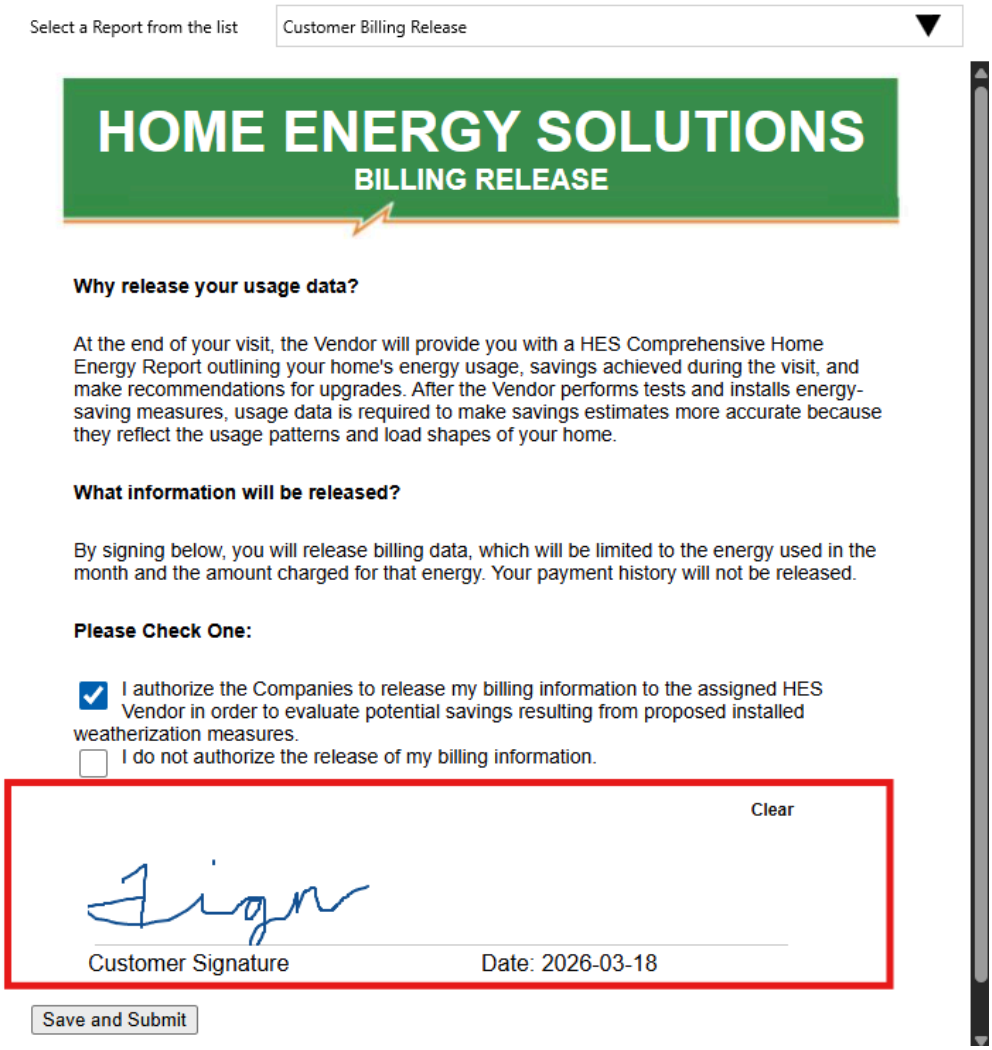
1. Navigate to the item or section requiring a photo
2. Tap the camera icon
3. Take the photo
4. The photo is automatically tagged with the item name, date, time, and geolocation data
5. Add a voice note or typed description if needed

Photos are stored on the device until the next sync, at which point they are uploaded to the project record in Hancock Software and organized automatically.

> **Tip:** Take photos of pre-installation conditions (existing equipment, problem areas) as well as post-installation results. This before/after record is required for invoice review and may be requested during compliance audits.

7. Obtain Electronic Signatures

Before completing the assessment, obtain the required electronic signatures directly on the device. Signatures are legally valid and are stored with the project record automatically.



Documents that typically require a customer signature include:

- **Billing release** — authorizes access to the customer's utility account data
- **Weatherization contract** — outlines the scope of work and customer obligations
- **Health & safety disclosure** — acknowledges any health or safety findings documented during the assessment
- **Financing application** — if a heat loan or on-bill financing product is offered (program-dependent)
- **Self-attestation of income** — for IRA or income-verified programs

Each signature form is presented in sequence. The customer signs directly on the screen. Completed signatures sync to Hancock Software and are attached to the relevant document in the project record.

💡 **IRA HOMES/HEAR Programs:** IRA HOMES rebate programs require a signed affidavit from the claimant attesting to the validity of household income information, occupant count, and enrollment documentation. For multifamily buildings, a building owner signature confirming that improvements were made at the specified address is also required.

8. Generate Documents

After data entry and signatures are complete, Mint Mobile generates the program documents for the visit - these documents can be configured specifically for your program and populated with data captured during the assessment.

Documents generated may include:

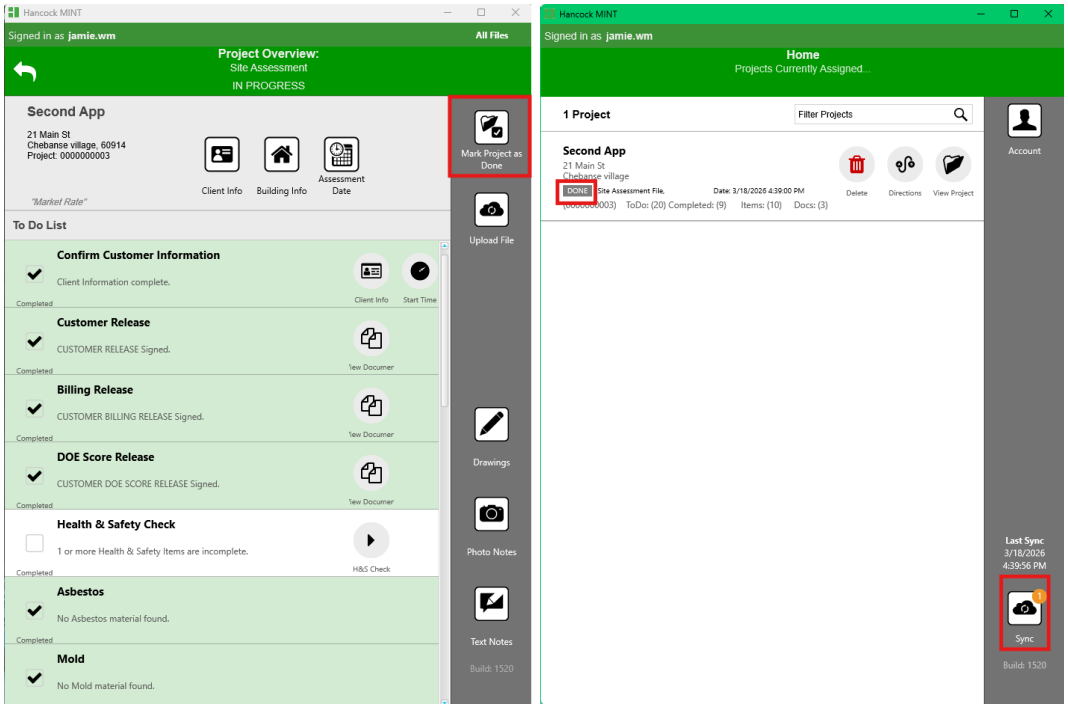
- Home Energy Assessment Report
- Receipt for direct install measures
- Weatherization Contract
- Permit Authorization Form
- Contractor Information Form
- Contractor Incentive Report
- Energy Savings Report
- Heat Loan Intake Form (if applicable)

The exact documents generated depend on your program configuration. Document branding (logo, header) reflects the lead vendor organization of the logged-in user.

Review each document for accuracy before leaving the site. If an error is found, return to the relevant To-Do step, correct the data, and regenerate the document.

9. Mark Complete and Sync

When all To-Do List steps are checked off, mark the assessment complete. This flags the project for sync and signals to Hancock Software that field work is done.



To complete and sync:

1. Tap **Mark as Done** on the project
2. A sync flag will appear indicating data is ready to upload
3. When you return to a network connection, open Mint Mobile and tap **Sync**
4. All captured data — household information, measures, photos, signatures, energy model results — is pushed to Hancock Software
5. The project record in Hancock Software updates automatically; the project is now ready for the next workflow step

📱 **Mint Mobile (field assessors):** Data stored on your device is safe even if you close the app or your device loses power before syncing. Your work is saved locally and will upload as soon as you sync.

Working Offline

Mint Mobile is designed to function completely offline. Once projects are downloaded during your morning sync, you can complete full assessments — including energy modeling, document generation, and signature capture — with no internet connection.

The only thing that requires connectivity is the sync itself. Everything else works offline without limitation.

Note: Do not uninstall or update Mint Mobile while you have unsynced project data on your device. Complete your sync first, then update the app.

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10. Work Orders

What Is a Work Order?

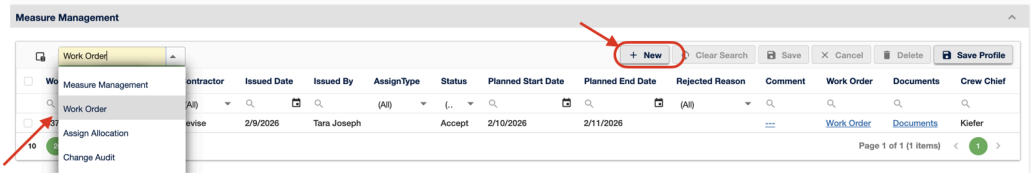
A work order is the task assignment that tells an installation contractor or crew exactly what work to perform on a specific project. Work orders are created after the energy assessment is complete and list only the measures selected during the audit — insulation, air sealing, HVAC replacements, and similar upgrades.

Work orders are the mechanism by which energy efficiency organizations or agencies assign specific scopes of work to contractors. Once assigned, the contractor sees only the project details and measures included on their work order — not the full project record.

Creating a Work Order

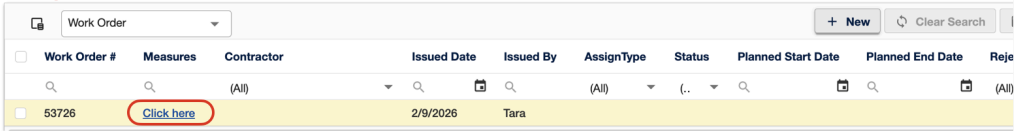
🔒 **Energy Efficiency Organizations / Agencies:** Create work orders for contractors within their network.

Step 1: Navigate to the work order menu and select new

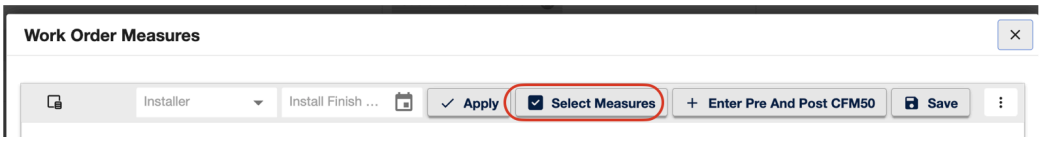


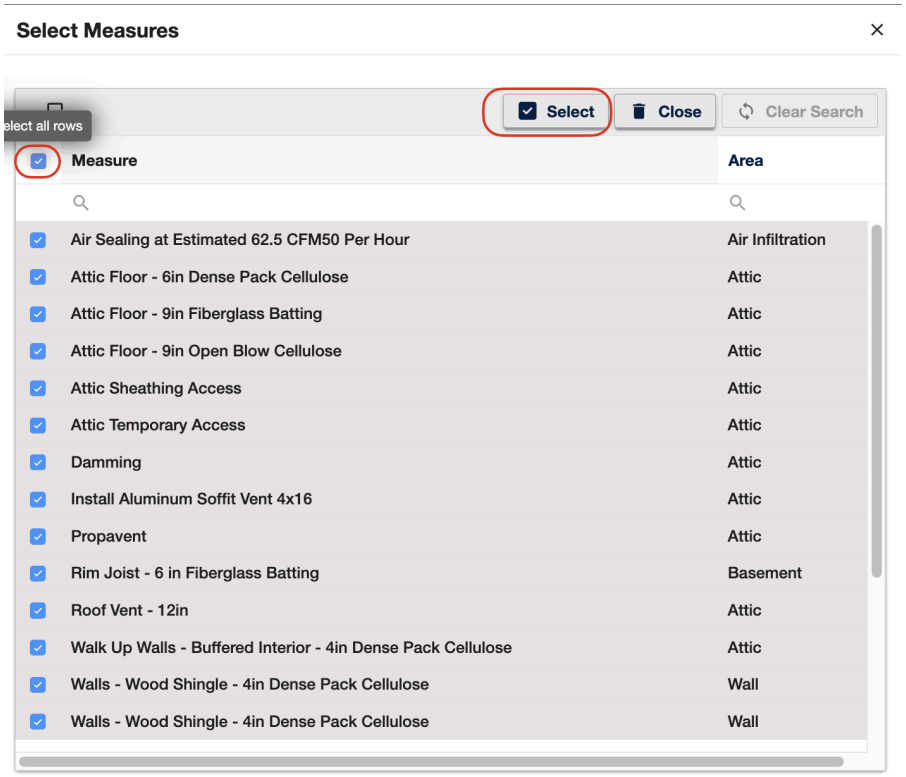
Step 2: Select the contractor, enter the issue date and save

Step 3: Click here



Step 4: Select Measures





To create a work order:

1. Open the project record
2. Navigate to the **Work Orders** section
3. Click **New**
4. Select the contractor and issue date and **Save**
5. Select they Click Here hyperlink
6. Select the measures to include on this work order
7. Choose the assignment type (optional)
8. Enter the planned start and end dates
9. Save — an automated email notification will be sent to the assigned contractor if email triggers are configured

Note: A single project can have multiple work orders, each assigned to a different contractor. However, each work order is assigned to one contractor only, and that contractor will only see the measures on their specific work order.

Contractor Assignment Types

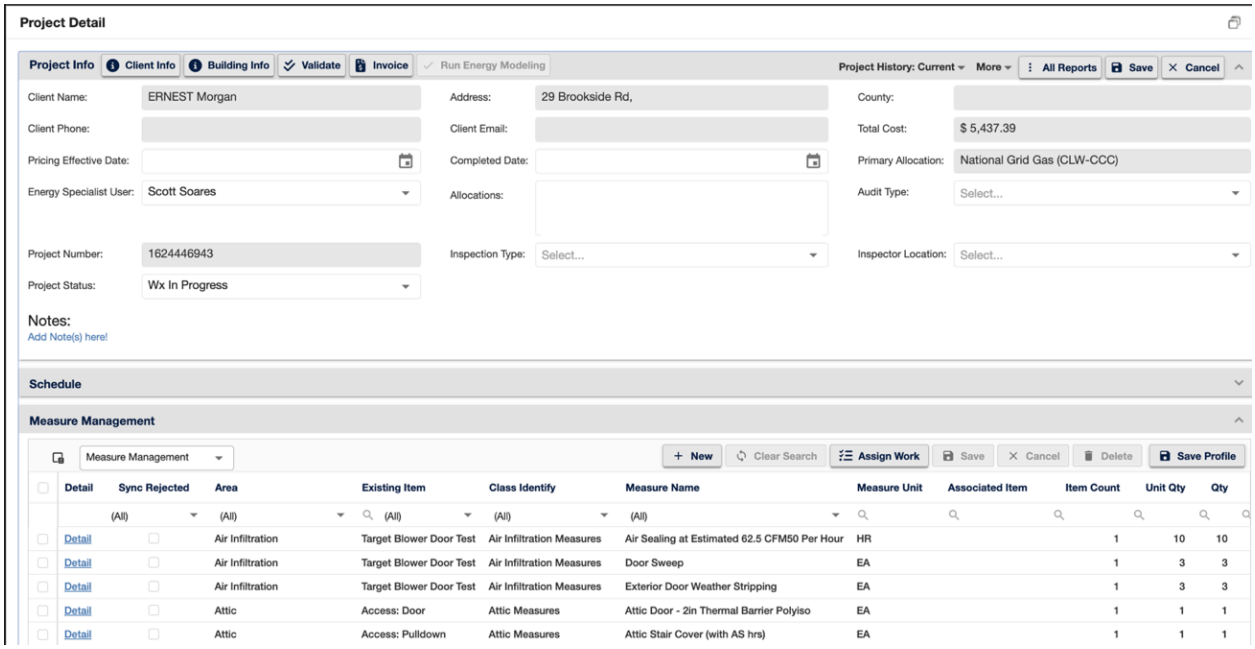
When creating a work order, you can specify how the contractor was selected

Assignment Type	Description
Merit-based	Contractor selected based on performance history or rating
Rotational	Contractor selected according to a round-robin rotation among eligible contractors
Manual	Contractor selected directly for a specific reason
Other	Any other assignment rationale

Note: Assignment types can vary in different installations.

What Contractors See

Once a work order is assigned, the contractor can log in to Hancock Software and view their assigned projects.



🔨 **Contractors:** Your work order view shows only the specific project and measures assigned to you. You will not see other measures on the same project that belong to a different contractor's scope.

Contractors can see:

- Project address and customer contact information
- The specific measures they are responsible for installing
- Planned start and end dates
- Any relevant notes

Accepting or Declining a Work Order

When a work order is assigned, the contractor can accept or decline it.

To accept a work order:

1. Open the work order in Hancock Software
2. Click **Accept**
3. The work order status updates — the lead energy efficiency organization or agency is notified

To decline a work order:

1. Open the work order
2. Click **Decline**
3. Enter a reason for declining (required)
4. Submit — the work order is returned to the organization / agency's queue for reassignment

🔒 **Organizations / Agencies only:** Declined work orders appear with the contractor's stated reason. Reassign to another contractor or investigate the reason before reassigning.

Tracking Work Order Status

Work order status tracks the contractor's progress through the assignment.

Status	Meaning
Pending	Assigned but not yet accepted by the contractor

Status	Meaning
Accepted	Contractor has confirmed the assignment
In Progress	Installation work has begun
Completed	Contractor has marked all assigned measures as installed
Declined	Contractor has declined; awaiting reassignment

---

11. Installation & Measure Tracking

Overview

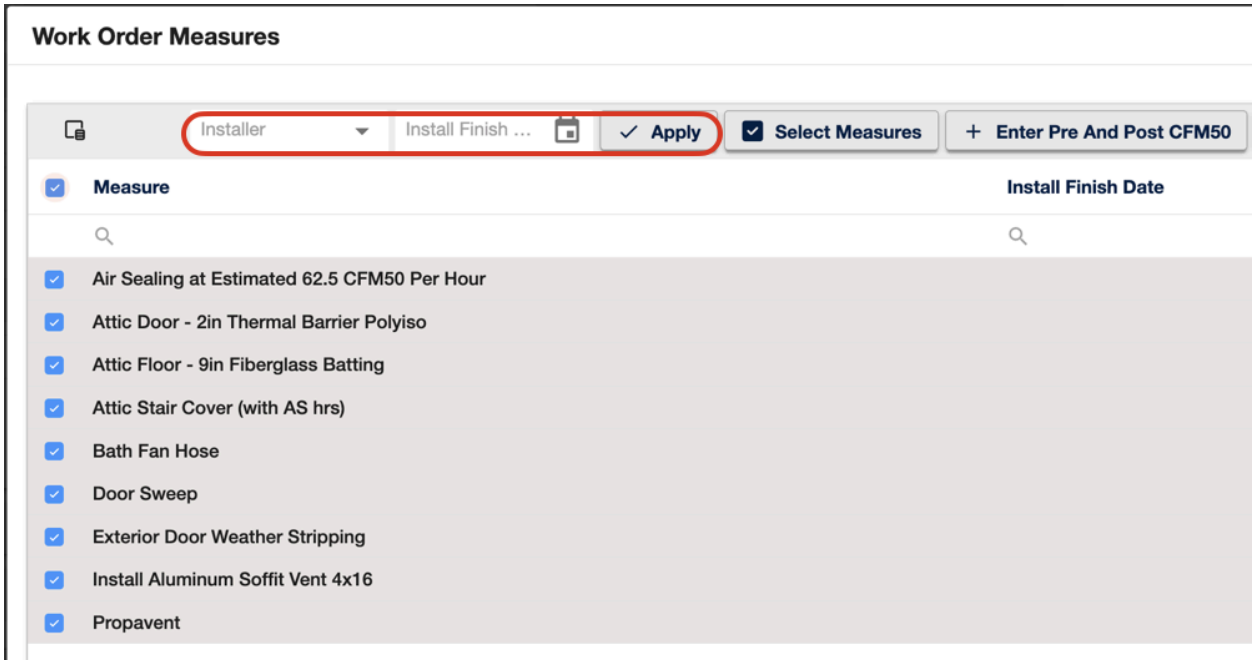
After a work order is accepted, the installation contractor performs the physical installation of major measures at the customer's home. When the work is done, the contractor records the installation in Hancock Software — logging what was installed, when, and by whom.

This section covers how installation is recorded in the Hancock Software web interface. Field-based recording of direct install measures during an audit is covered in Section 9: Mint Mobile.

Recording Installed Measures

🔨 **Contractors:** Record installations as soon as they are complete to keep the project moving through the workflow. Measures without an install date may not be able to be included on an invoice.

📸 **SCREENSHOT NEEDED:** `11-01_measure-installation-entry.png` — Installation entry screen on a work order showing measure list, installed checkboxes, and date fields — Source: Hancock end-to-end transcript.md, near quote: *"contractor selects measures installed…contractor enters install date…contractor marks 'installed' checkbox"*



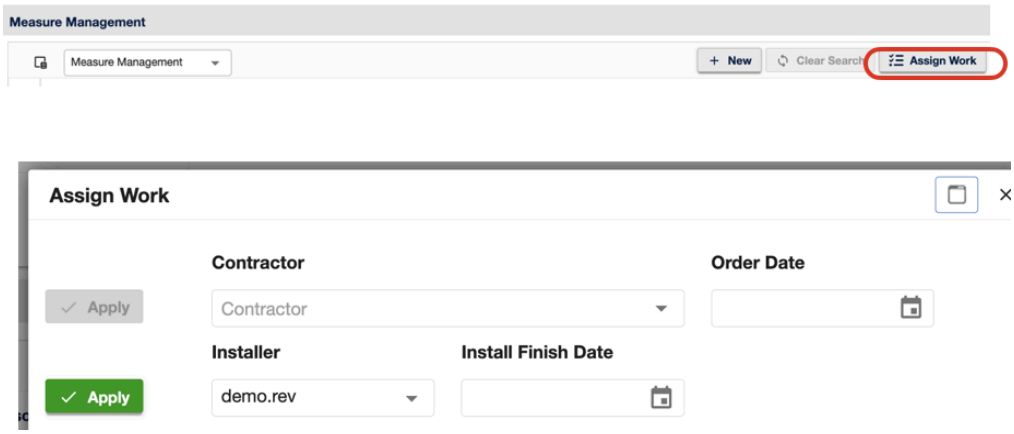
To record a completed installation:

1. Open the work order in Hancock Software
2. Use the click here hyperlink to locate the **Measures** section
3. For each measure installed, check the **Installed** checkbox
4. Enter the **install date** the completed measures
5. Select the **installer name** (the individual who performed the work)
6. Save

Note: You can save partial installations. If some measures on the work order are complete and others are not yet installed, check only the completed ones and save. Return and update when the remaining measures are done.

Install Date and Installer Name

Both the install date and installer name are entered. Hancock system configuration can vary. Some organizations enter Work Order and Install Information using the Measure Management **Assign Work** button.



Direct Install vs. Major Measure Lifecycles

Direct install measures and major measures follow different paths through the system:

	Direct Install Measures	Major Measures
Installed by	Field assessor, during audit	Installation contractor, via work order
Recorded in	Mint Mobile (during assessment)	Hancock Software web interface (after installation)
Install date	Auto-populated at time of audit	Entered manually by contractor
Invoiced on	Post-assessment invoice	Post-installation invoice

Both measure types must have an install date and be marked as installed before they can appear on an invoice.

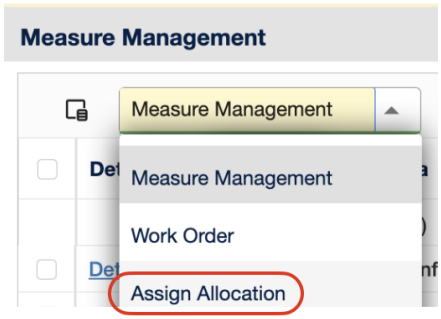
Measure Allocation Logic

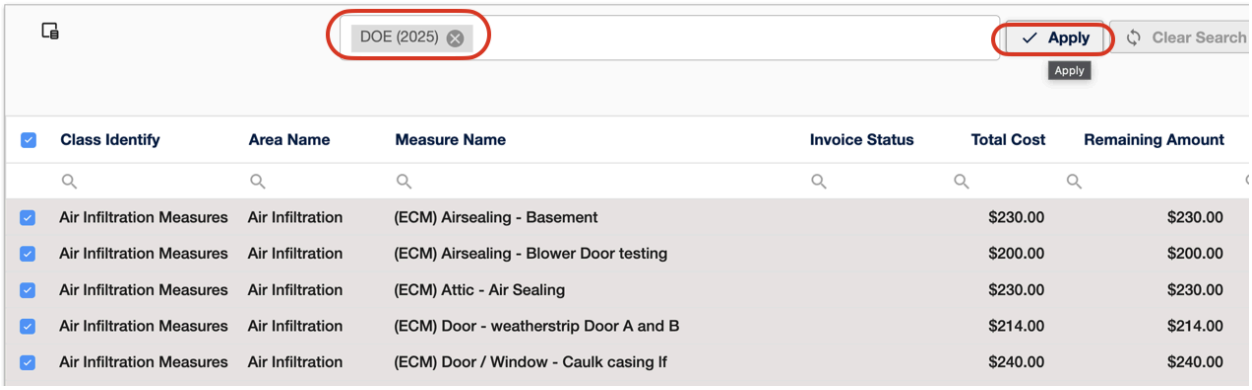
Each measure installed on a project can be assigned to a funding allocation.Select Assign Allocation. Manually select the allocation per measure

How to assign a group of measures to an allocation or allocations

- **Check the measures** → Make sure the allocation or allocations you want to assign is displayed

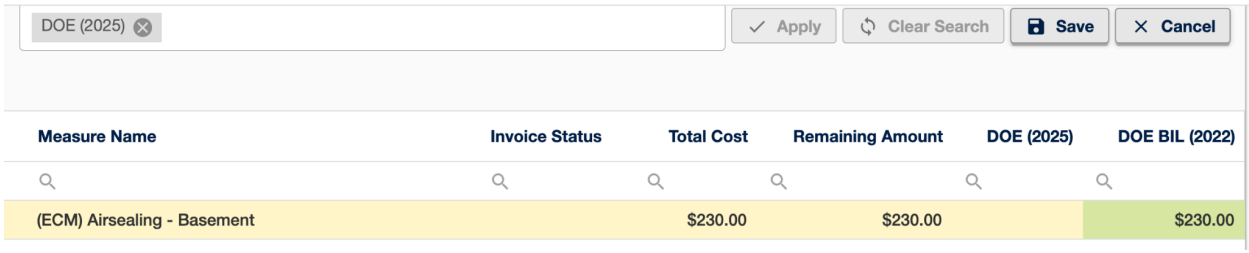
- **Select Apply** → all selected measures will be assigned to that allocation





How to assign a measures to an allocation directly in grid

- **Enter the amount assigned to the allocation directly in the assign allocation grid** → Save



12. Inspections & Reviews

Overview

Before an invoice can be approved and paid, the work on a project typically passes through one or more formal reviews. Hancock Software supports several review types, from internal organization or agency checks to physical on-site inspections by Quality Assurance staff.

Organization / Agency Reviews

Conduct workflow reviews at defined points in the project lifecycle using the project review feature. Project reviews are tailored at the system administrator level, here are some example stages of project reviews:

Review	Purpose	Performed By
Operations Review	Confirms operational readiness — all required fields complete, documents present	Organization / Agency
Technical Review	Assesses the technical quality of the assessment and proposed measures	Organization / Agency
Work Order Assignment Review	Clearance for an contractor to be assigned	Organization / Agency

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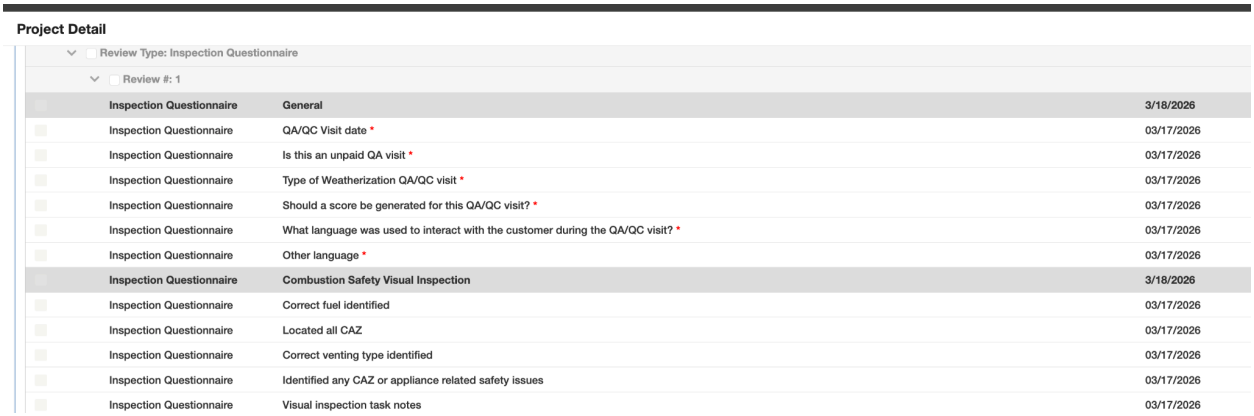
Inspections

For on-site inspections — whether in-process (during installation) or post-installation — Hancock Software provides an **Inspection** section that the inspector completes to document their findings.



To complete an inspection questionnaire:

1. Open the project record
2. Navigate to the project review **Inspections** section
3. Open the applicable inspection questionnaire
4. Complete all fields — marking measures as passed or failed, adding notes, attaching photos
5. Save — the inspection result is recorded on the project

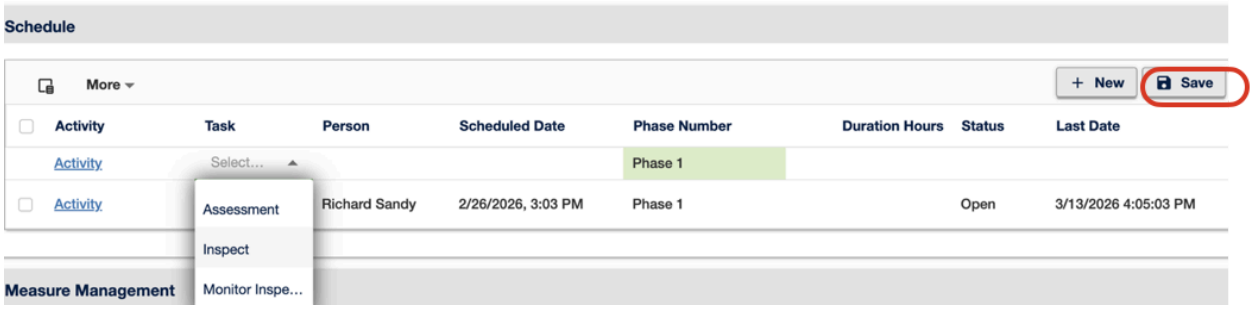
Note: Not all customers access inspection questionnaires. The inspection questionnaire is in the Project Review section and is configurable at the system administrator level. Your system may not display project review.

Inspections can be conducted in Mint Mobile (Inspection Mode) or through the Hancock Software web interface, depending on your program's setup.

Mint Mobile: Inspection Mode

📱 **Mint Mobile (field assessors):** Inspection Mode is used by QC staff to review completed installation work on-site. It is a distinct mode from Assessment Mode and uses the same project file — meaning inspectors see exactly what the original assessor captured and can compare it directly with the physical work.

Note: Mobile inspections vary based on the configuration of your Hancock system. If you do not see the inspection option in the task dropdown, your system does not support mobile inspections.



Inspection Mode workflow:

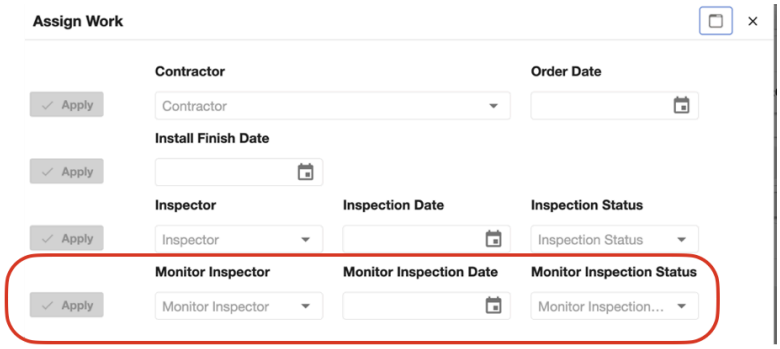
1. Sync the project to your device before arriving on-site
2. Open the project in Inspection Mode
3. Review each measure one by one, comparing the physical work to the original audit record
4. For each measure: tap **Pass** (work meets standard) or **Fail** (work does not meet standard)
5. For rejected or failed measures you can add a photo and note explaining the issue
6. For post blower door tests: complete the post blower door cfm readings
7. Sync when complete to push results back to Hancock Software

---

Monitor Inspections

Each measure in the system can pass or fail monitor inspections. Lead organizations or states review and pass or fail measures. Within Measure Management select the **assign work** button. Select the Monitor Inspector and set the Monitor Inspection Date and Monitor Inspection Status.

> 📸 **SCREENSHOT NEEDED:** `12-04_qa-scoring-screen.png` — QA scoring screen on an invoice or project showing score fields, documentation checklist, and contractor rating — Source: Hancock end-to-end transcript.md, near quote: *“scoring based on documentation accuracy…score impacts contractor’s ability to receive future work”*



Monitor Inspections typically evaluate:

- Accuracy of installation documentation vs. physical work
- Completeness of required photos and signatures
- Measure quantity and specification accuracy
- Timely and correct invoice submission

A project's monitor inspection status is visible to the organization the project is assigned to.

---

13. Invoicing

Overview

Invoicing is how contractors document and request payment for completed work. In Hancock Software, invoices are created after measure installation and inspection.

Example Invoicing

Post-Installation Invoice	Measures are installed and inspection	Could include major measures (weatherization, insulation, etc.) or direct install measures or crisis HVAC repairs.

Invoices go through a validation process review and approval workflow before reaching the Program Administrator for final payment.

Creating a Post-Installation Invoice

🔨 **Energy Efficiency Organizations / Agencies:** Create the post-installation invoice after all major measures on your work order or direct install measures that are not on work orders have been installed, dated, and marked complete.

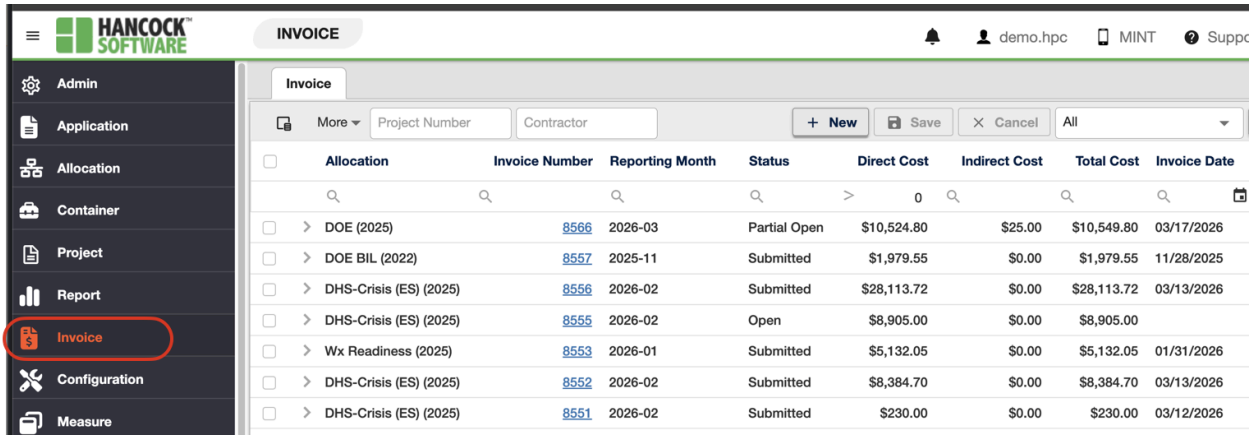
To create a post-installation invoice:

1. Open the project record
2. Select **validate** to make sure the project is ready for invoicing
3. Under Measure Management, select Assign Allocation to make sure the measures are assigned to allocations.
4. Click **Create Invoice**
5. Select the applicable allocation(s)
6. Review the invoice month
7. Click **Save** when ready

🔒 **The invoice is now ready to submit on the Invoice screen**

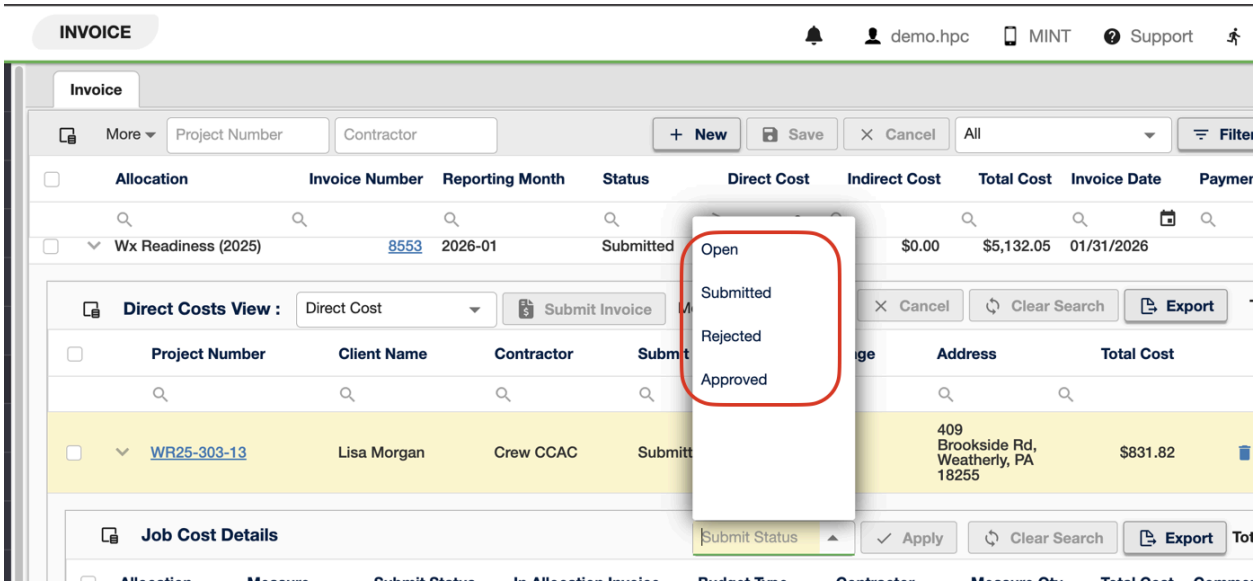
How Invoices Display

The invoice screen displays a list of invoices that can include multiple projects



Invoice Status Workflow

📸 **SCREENSHOT NEEDED:** `13-03_invoice-status-workflow.png` — Invoice list screen showing invoices in different statuses (Open, Submitted, Under Review, Approved, Rejected) — Source: Hancock end-to-end transcript.md, near quote: *"Open…Submitted…lead vendor review…Approved…Rejected"*



Status	What It Means	Next Action
Open	Invoice created; Energy efficiency organization reviewing before submission	Energy efficiency organization reviews and submits
Submitted	Energy efficiency organization has finalized and submitted	Measures cannot be edited; awaiting program administrator review
Approved	Program Administrator approved; ready for allocation invoice	Program administrator creates allocation invoice
Rejected	Program Administrator found issues; returned to energy efficiency organization	Energy efficiency organization corrects and resubmits

Reopening and Correcting a Rejected Invoice

If a program administrator rejects an invoice, it is returned to the organization with a reason. The organization can reopen the invoice, make corrections, and resubmit.

> 🔨 **Contractors:** Review the rejection reason carefully before making changes. Common reasons include missing install dates, incorrect measure quantities, unsigned documents, or wrong allocation selection.

To correct a rejected invoice:

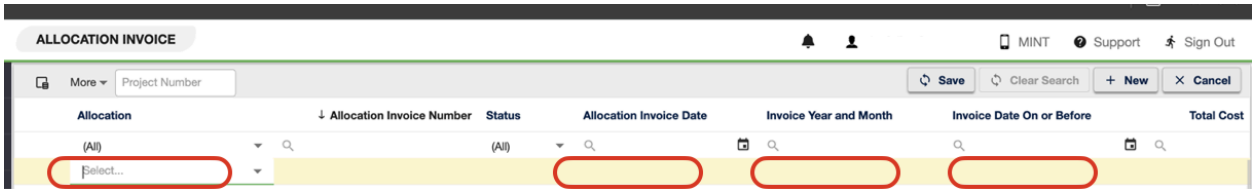
1. Open the rejected invoice
2. Click **Reopen** (or the equivalent button in your configuration)
3. Make the required corrections — adjust measure quantities, add missing dates, or change the allocation
4. Click **Submit** to resubmit for lead vendor review

> **Note:** If corrections require changing measure quantities significantly (not just dates or allocation), a **change audit** process may be required.

Allocation Invoices

Once individual contractor invoices are approved, a Program Administrator creates an **allocation invoice** — a batch invoice that pulls all approved line items for a given allocation into a single payment request submitted to the funding source.

> 🏢 **Program Administrators only:** Allocation invoice creation is restricted to Program administrators and utility or state-level users.



To create an allocation invoice:

1. Navigate to **Invoices → Allocation Invoices→ New**
2. Select the allocation
3. Set the allocation invoice date
4. Enter the Invoice Year and Month (Format is YYYY-MM)

5. Enter the Invoice Date on or Before and Save
6. **Save** and the Allocation Invoice is created — all approved line items for that allocation are pulled in automatically
7. Review the line items and remove any that should not be included in this run
8. Select the export format for your funding source
9. Set the Status to Open. Set the status to **Close** when the funding source has accepted the invoice — no further editing is permitted after closing

---

14. Reporting & Dashboards

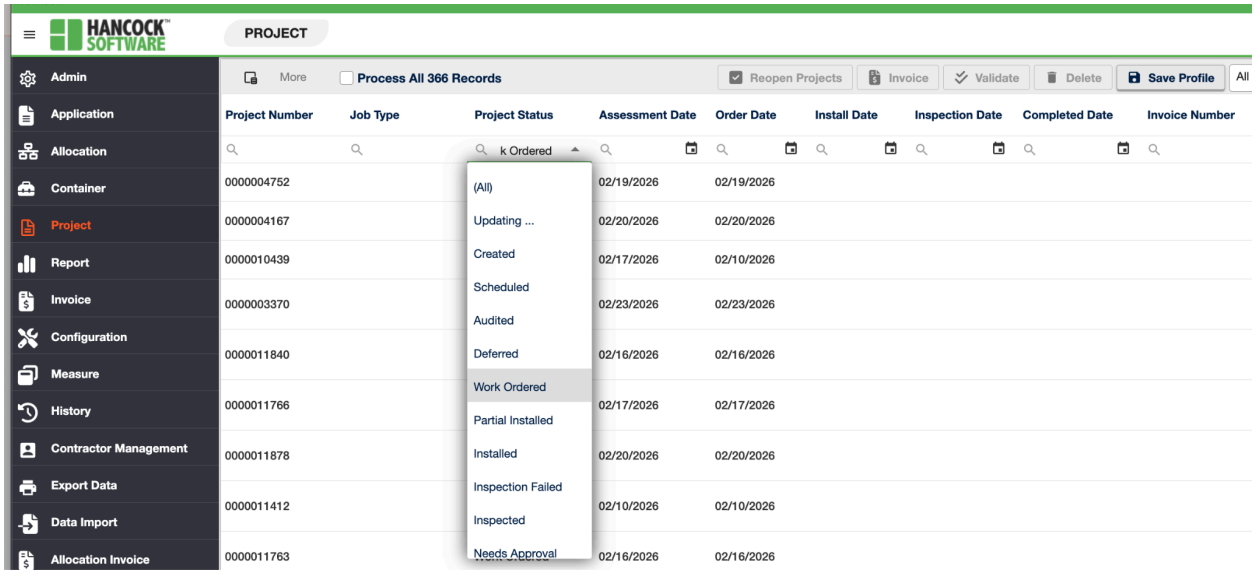
Overview

Hancock Software provides reporting and dashboard tools that give program administrators, energy efficiency organizations, states and contractors visibility into program performance, funding utilization, and compliance status. Most reports are available in real time, pulling from live project data.

Project-Level Reporting

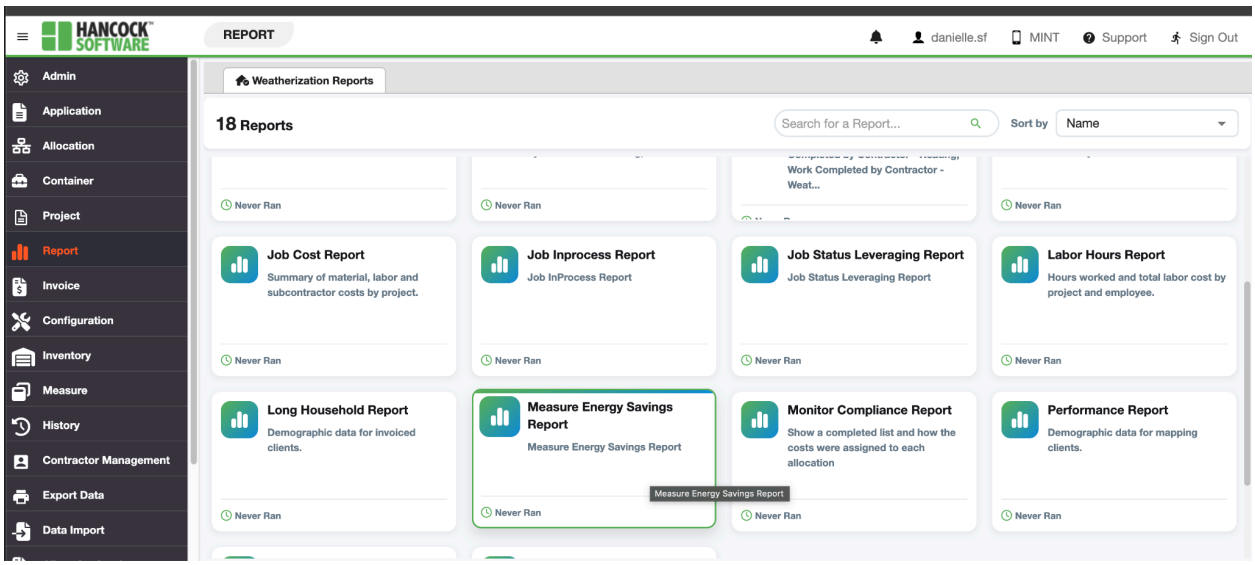
The most immediate form of reporting in Hancock Software is the **project list** itself — a filterable, configurable grid that can surface exactly the records you need with the right combination of filters and saved views.

Beyond filtering, project records carry detailed data at the measure and invoice level, making it possible to drill into specific projects and understand cost, stage and status information for any individual job.



Energy Savings Reports

Energy savings reports summarize the modeled or verified energy savings delivered by your program across all completed projects. These reports are the core of program performance tracking.



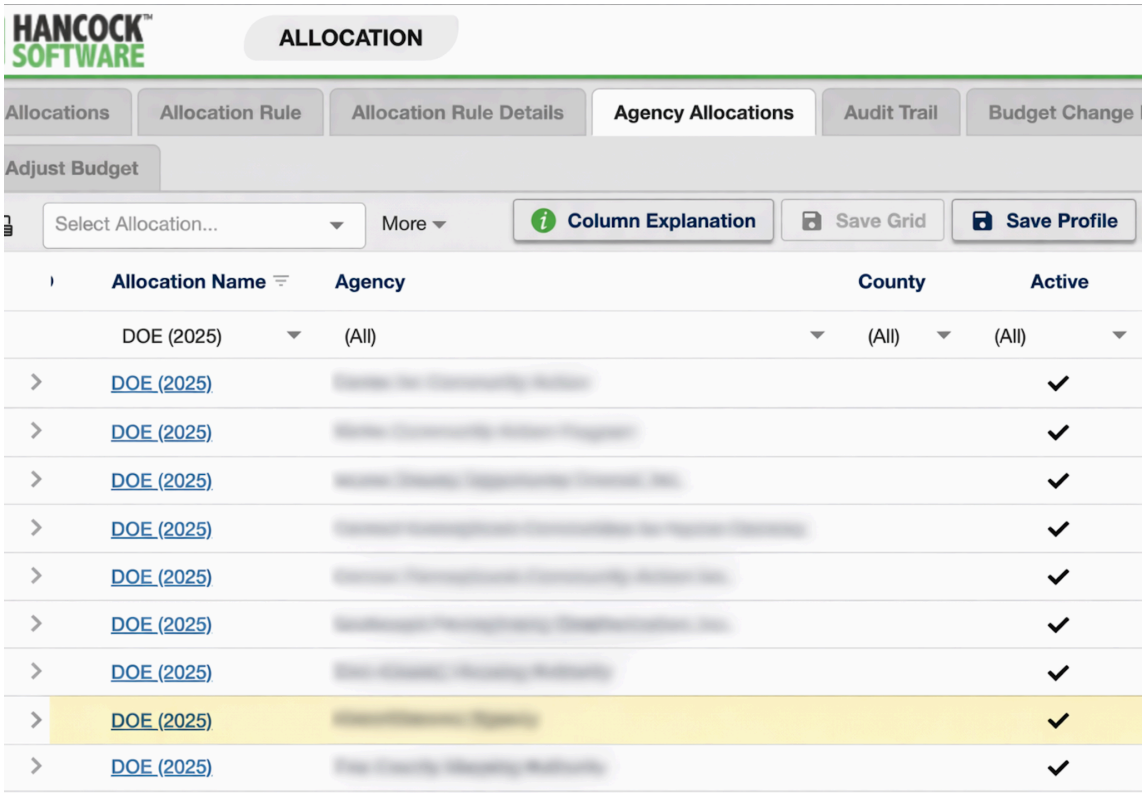
Reports can typically be filtered by:

- Date range
- Allocation / funding source
- Contractor organization
- Measure type
- Geographic area (if configured)

> 💡 **IRA HOMES/HEAR, DOE Weatherization and LIHEAP DHHS Programs:** For HOMES rebate programs, DOE Weatherization and LIHEAP Hancock Software generates pre-built **quarterly reports** — submission-ready datasets that meet federal reporting requirements. These reports are generated from project data and can be exported directly for submission to federal partners.

Allocation & Budget Tracking

The allocation reporting tools show how program funds are being used in real time — how much has been committed, how much has been invoiced, and how much remains.

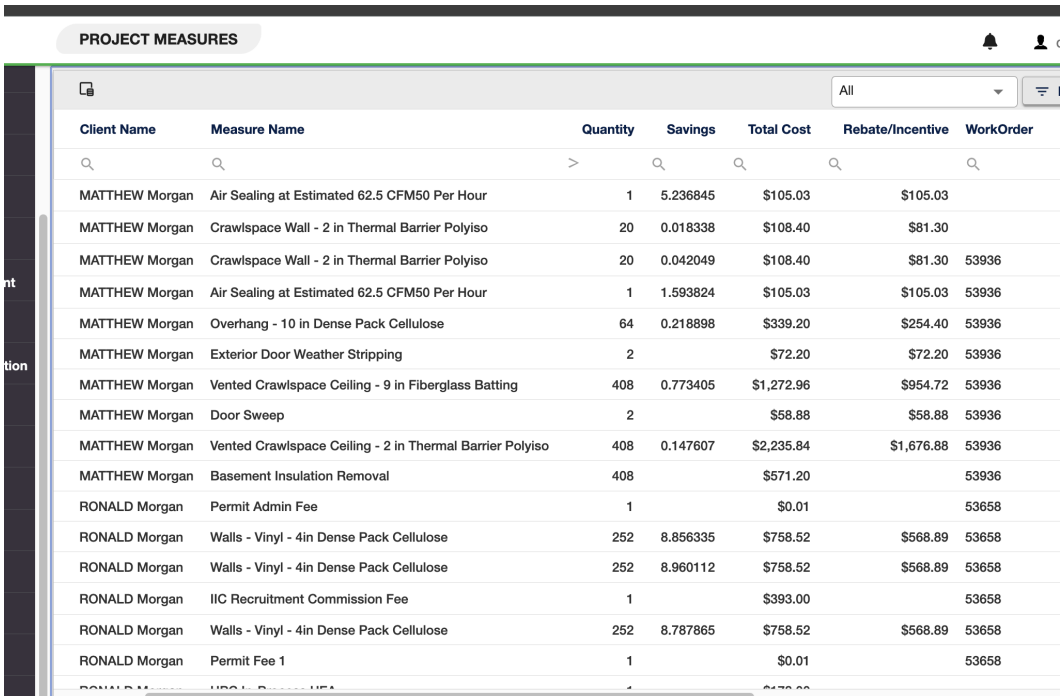


🏢 **Program Administrators:** Use allocation budget reports to monitor spend against program goals and identify allocations that are at risk of overspending or underspending before the program period ends. Budget type breakdowns (administrative, health & safety, etc.) are visible at this level.

🔒 **Energy Efficiency Organizations / States:** You can view the budget status for allocations under your organization. Use this information to prioritize project completion before allocation deadlines.

Contractor Performance Metrics

Hancock Software tracks contractor performance over time, including measures installed, energy savings delivered.



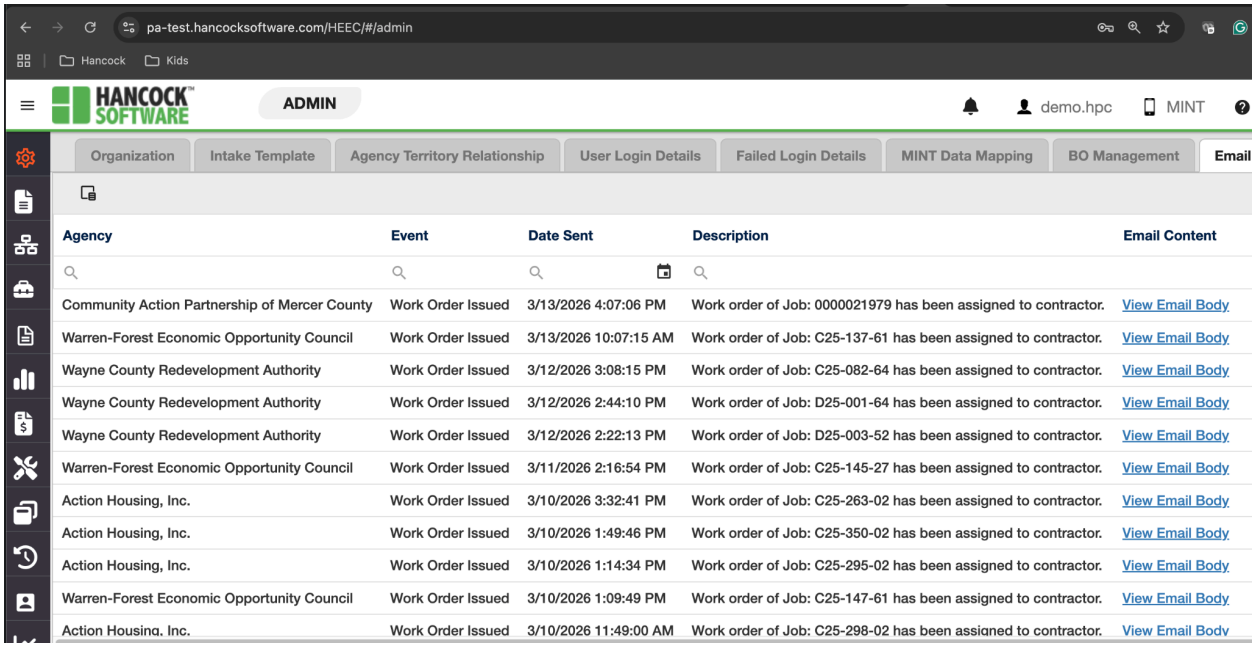
Client Name	Measure Name	Quantity	Savings	Total Cost	Rebate/Incentive	WorkOrder
MATTHEW Morgan	Air Sealing at Estimated 62.5 CFM50 Per Hour	1	5.236845	$105.03	$105.03	
MATTHEW Morgan	Crawlspace Wall - 2 in Thermal Barrier Polyiso	20	0.018338	$108.40	$81.30	
MATTHEW Morgan	Crawlspace Wall - 2 in Thermal Barrier Polyiso	20	0.042049	$108.40	$81.30	53936
MATTHEW Morgan	Air Sealing at Estimated 62.5 CFM50 Per Hour	1	1.593824	$105.03	$105.03	53936
MATTHEW Morgan	Overhang - 10 in Dense Pack Cellulose	64	0.218898	$339.20	$254.40	53936
MATTHEW Morgan	Exterior Door Weather Stripping	2		$72.20	$72.20	53936
MATTHEW Morgan	Vented Crawlspace Ceiling - 9 in Fiberglass Batting	408	0.773405	$1,272.96	$954.72	53936
MATTHEW Morgan	Door Sweep	2		$58.88	$58.88	53936
MATTHEW Morgan	Vented Crawlspace Ceiling - 2 in Thermal Barrier Polyiso	408	0.147607	$2,235.84	$1,676.88	53936
MATTHEW Morgan	Basement Insulation Removal	408		$571.20		53936
RONALD Morgan	Permit Admin Fee	1		$0.01		53658
RONALD Morgan	Walls - Vinyl - 4in Dense Pack Cellulose	252	8.856335	$758.52	$568.89	53658
RONALD Morgan	Walls - Vinyl - 4in Dense Pack Cellulose	252	8.960112	$758.52	$568.89	53658
RONALD Morgan	IIC Recruitment Commission Fee	1		$393.00		53658
RONALD Morgan	Walls - Vinyl - 4in Dense Pack Cellulose	252	8.787865	$758.52	$568.89	53658
RONALD Morgan	Permit Fee 1	1		$0.01		53658

🔒 **Energy Efficiency Organizations / Agencies:** Use contractor performance data to inform work order assignment decisions, credential renewal tracking, and contractor development conversations.

🏢 **Program Administrators:** Quality Control inspection reports and monitor compliance reports show inspection findings, corrective actions taken, units completed and dollars spent.

Email Log

Every automated email sent by Hancock Software is recorded in the email log, giving administrators a complete history of system-generated communications.



Agency	Event	Date Sent	Description	Email Content
Community Action Partnership of Mercer County	Work Order Issued	3/13/2026 4:07:06 PM	Work order of Job: 0000021979 has been assigned to contractor.	View Email Body
Warren-Forest Economic Opportunity Council	Work Order Issued	3/13/2026 10:07:15 AM	Work order of Job: C25-137-61 has been assigned to contractor.	View Email Body
Wayne County Redevelopment Authority	Work Order Issued	3/12/2026 3:08:15 PM	Work order of Job: C25-082-64 has been assigned to contractor.	View Email Body
Wayne County Redevelopment Authority	Work Order Issued	3/12/2026 2:44:10 PM	Work order of Job: D25-001-64 has been assigned to contractor.	View Email Body
Wayne County Redevelopment Authority	Work Order Issued	3/12/2026 2:22:13 PM	Work order of Job: D25-003-52 has been assigned to contractor.	View Email Body
Warren-Forest Economic Opportunity Council	Work Order Issued	3/11/2026 2:16:54 PM	Work order of Job: C25-145-27 has been assigned to contractor.	View Email Body
Action Housing, Inc.	Work Order Issued	3/10/2026 3:32:41 PM	Work order of Job: C25-263-02 has been assigned to contractor.	View Email Body
Action Housing, Inc.	Work Order Issued	3/10/2026 1:49:46 PM	Work order of Job: C25-350-02 has been assigned to contractor.	View Email Body
Action Housing, Inc.	Work Order Issued	3/10/2026 1:14:34 PM	Work order of Job: C25-295-02 has been assigned to contractor.	View Email Body
Warren-Forest Economic Opportunity Council	Work Order Issued	3/10/2026 1:09:49 PM	Work order of Job: C25-147-61 has been assigned to contractor.	View Email Body
Action Housing, Inc.	Work Order Issued	3/10/2026 11:49:00 AM	Work order of Job: C25-298-02 has been assigned to contractor.	View Email Body

The email log can be filtered by:

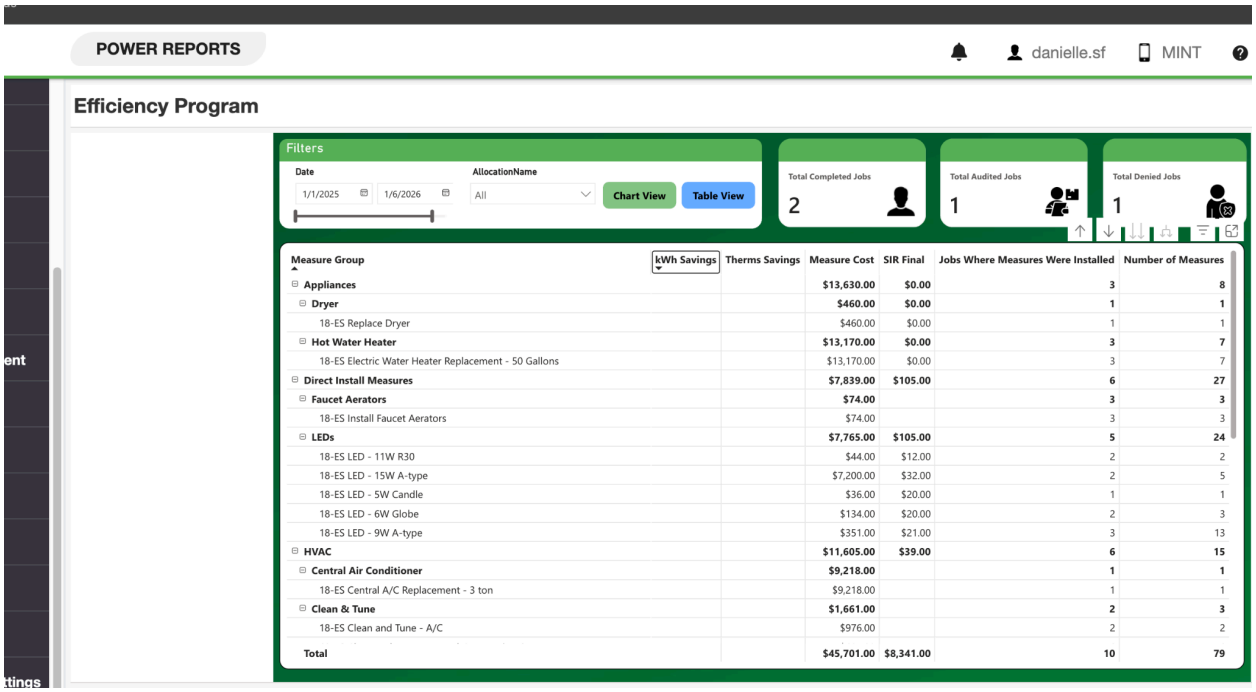
- Event type (e.g., appointment confirmation, work order assignment, 90-day reminder)
- Recipient
- Date range
- Project or agency

This is useful for troubleshooting cases where a contractor or customer claims not to have received a notification — you can confirm whether the email was sent and when.

PowerBI Integration

For organizations that want to build custom dashboards and cross-program analytics, Hancock Software supports data export to **PowerBI**.

Tailored PowerBI dashboards can display program level data from Hancock, including project counts, energy savings, budget utilization. Setup requires coordination with your Hancock administrator.



15. Configuration & Administration

Overview

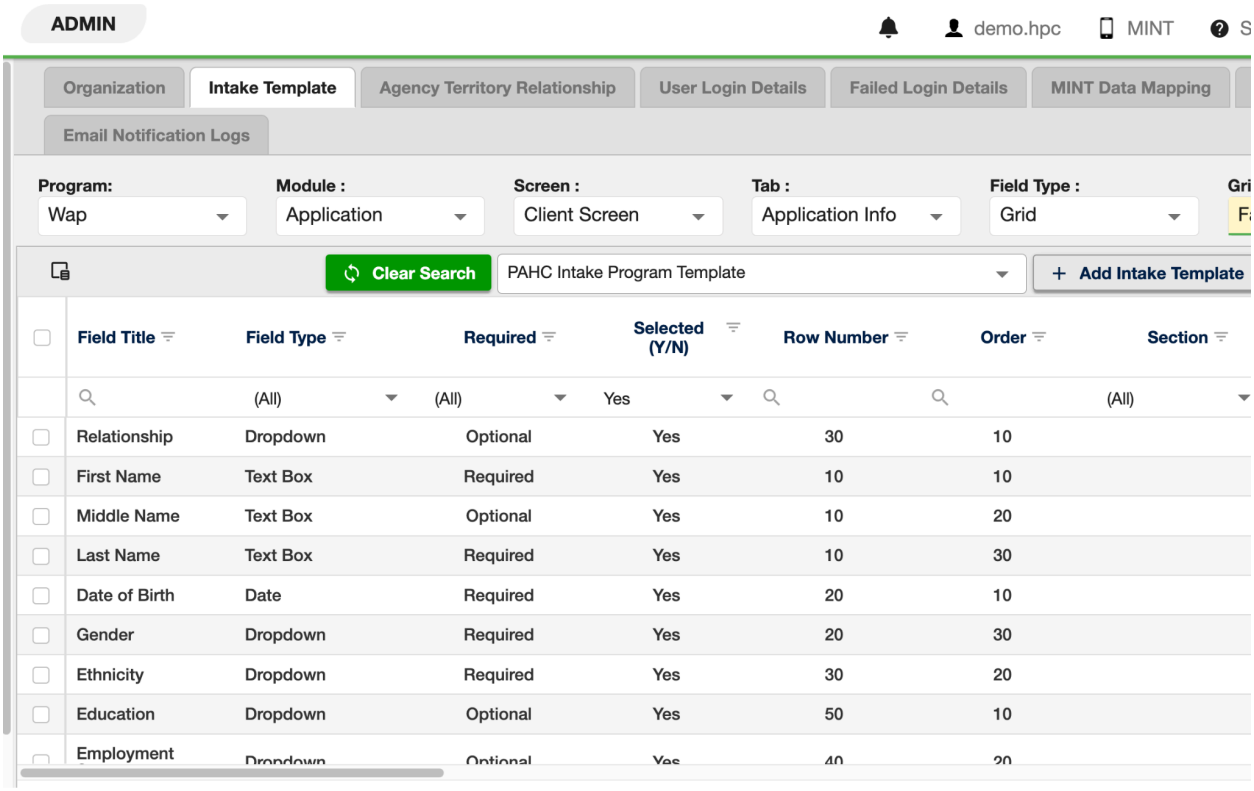
Most of Hancock Software's behavior can be configured without writing code — through the administration interface, dropdown menus, and form configuration. Some advanced configurations (primarily those involving SQL-based business logic rules) require assistance from the Hancock professional services team.

This section describes what administrators can configure independently, and what requires Hancock support.

> 🏢 **Program Administrators only:** All tasks in this section require administrator-level access. Contact your Hancock representative if you need to perform a configuration not covered here.

Configuring Application Fields and Picklists

Application intake forms are fully configurable. Administrators can add, remove, reorder, or relabel fields, set fields as required or optional, and define the values available in any dropdown picklist.



What you can configure without Hancock support:

- Show or hide fields on the application intake form
- Change field labels
- Mark fields as required or optional

- Add new values to picklist dropdowns (e.g., new deferral reasons, new housing types)
- Reorder fields within a section

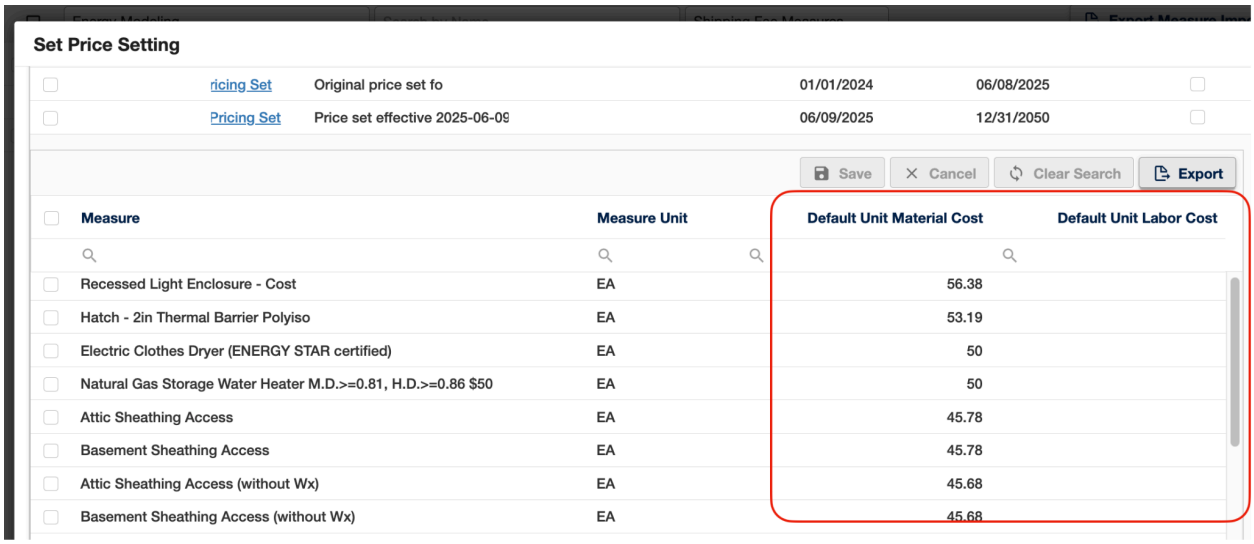
What requires Hancock support:

- Creating new fields with complex conditional logic (e.g., “show field X only if field Y = Z”)
- Connecting field values to business rules or allocation logic
- SQL-based validation rules

Measures and Price Sets

Measures — the energy efficiency upgrades your program installs — are configured with their specifications, unit costs, labor costs, incentive amounts, and allocation-specific codes.

> 📸 **SCREENSHOT NEEDED:** `15-02_measure-price-set-config.png` — Measure configuration screen showing measure code, unit cost, labor cost, incentive percentage, and effective date fields — Source: Hancock end-to-end transcript.md, near quote: *“define measure defaults including codes, incentives, and specifications…material and labor costs…different costs for multiple funding sources per measure”*



Price sets group measure costs by utility or organization. Different funding sources may have different price sets, meaning the same measure can have a different unit cost depending on which organization is doing the work.

Key configuration elements per measure:

- **Labor** — Labor cost per installed unit
- **Material cost**— Labor cost per installed unit
- **Effective dates** — price sets can be date-ranged to reflect rate changes over time

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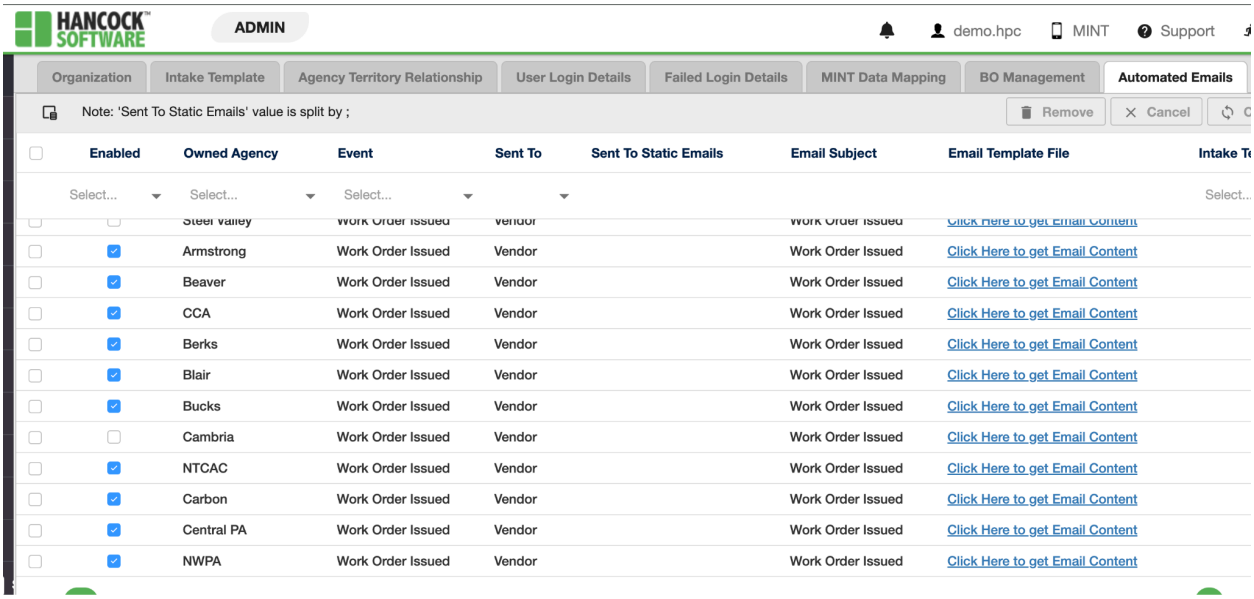
Configuring Incentive Levels

Incentive levels determine what percentage of a measure's cost is covered by the program vs. paid by the customer. Incentive levels require additional configuration — specifically, the rebate calculation method (job-based, measure-based, fixed per item, percent of savings). These are typically set up by the Hancock professional services team during program onboarding.

Automated Email Triggers and Templates



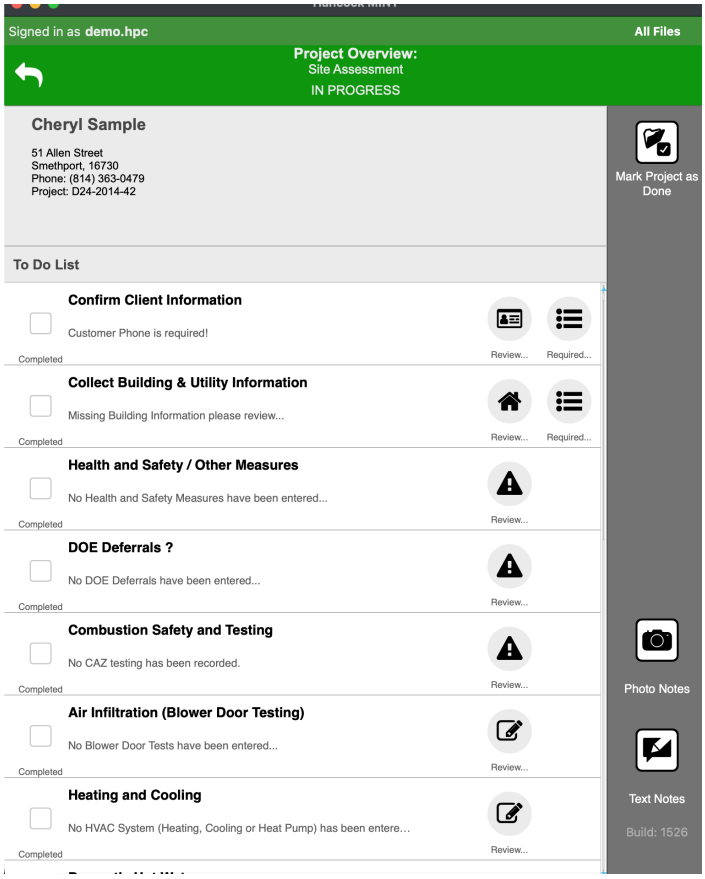
To configure an email trigger:

1. Navigate to **Administration → Email Triggers**
2. Click **Add Trigger** or select an existing trigger to edit
3. Select the triggering event (e.g., “Assessment Scheduled,” “Work Order Assigned”)
4. Select or create the email template to use
5. Define recipients (e.g., assigned assessor, customer, lead vendor)
6. Save and activate the trigger

Note: Automated emails are typically set up by the Hancock professional services team during program onboarding. Special configuration is required to set any conditions that must be true for the trigger to fire. The professional services team will embed email templates. Email templates support variable substitution — placeholders like `{customer_name}` and `{project_address}` are automatically replaced with actual values when the email is sent.

Configuring Mint Mobile To-Do Lists

The sequence of tasks in Mint Mobile’s To-Do List is configured per program. Administrators can control which tasks are included, their order, whether tasks are required or optional, and what data validation rules apply within each task.



What you can configure without Hancock support:

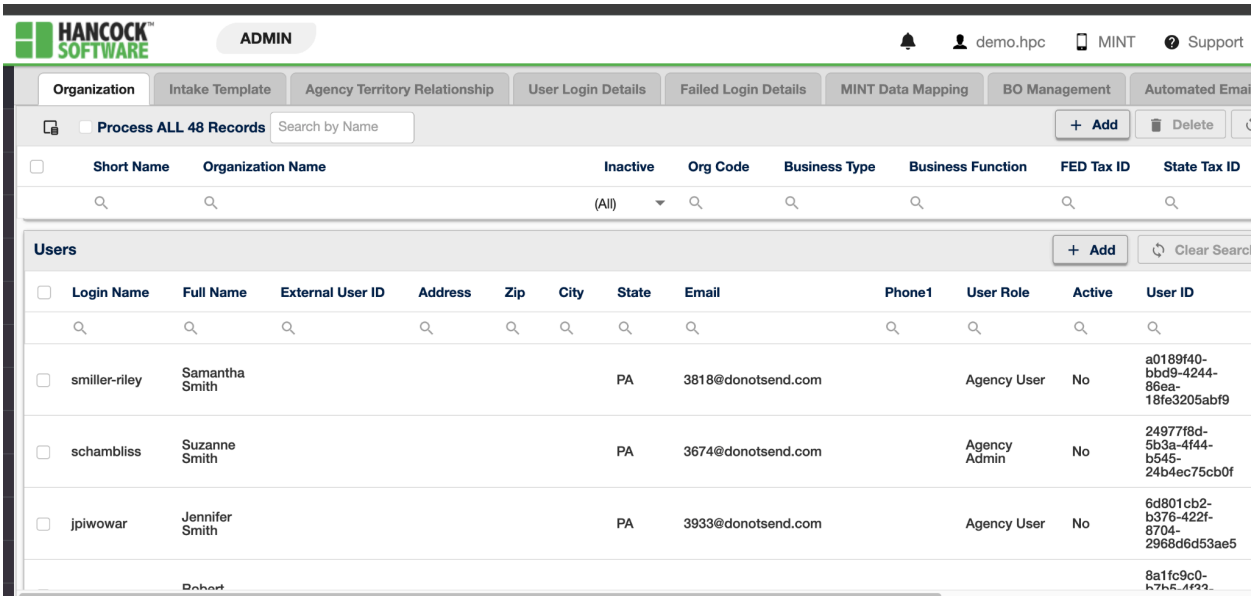
- Task order (drag and drop)
- Required vs. optional tasks
- Which fields appear within a task
- Conditional field display within a task

What requires Hancock support:

- Range validations on numeric fields (e.g., “alert if blower door result is outside expected range”)
- Complex conditional logic between tasks
- New task types not already in the system

Adding and Managing Users

User accounts are managed in the **Administration → Users** section. Each user must be assigned to an organization and given a role before they can log in.



To add a new user:

1. Navigate to **Administration → Users**
2. Click **Add User**
3. Enter the user's name, email address, and contact details
4. Select their organization from the hierarchy
5. Assign their role
6. Save — the user will receive a login invitation by email

To deactivate a user:

1. Locate the user in the user list
2. Click their name to open their record
3. Change their status to **Inactive**
4. Save — the user will no longer be able to log in, but their historical records are preserved

Note: Users cannot be fully deleted from the system, as their activity is tied to project and invoice records. Deactivating the account is the correct way to remove access.

Rule Sets: What You Can Configure vs. What Requires Hancock Support

Rules in Hancock Software fall into two categories:

Self-service configuration (no Hancock support needed): - Picklist values (deferral reasons, housing types, status labels) - Field visibility and required/optional settings - Email trigger conditions and templates - Measure price sets and measure characteristics - Mint Mobile To-Do List sequencing - Allocation goals and date ranges - New allocation setup (for experienced administrators)

Requires Hancock professional services: - SQL-based eligibility and qualification rules - Duplicate-check logic (e.g., two-year lookback rules) - Complex field dependencies and cross-field validation - Project Approval rules - Energy modeling calculation parameters - Custom document layouts and report templates - API integrations (scheduling, customer portal, third-party systems)

When you need to request a rule change or new configuration from Hancock, document the business requirement clearly (what the rule should do, and under what conditions) rather than trying to describe the technical implementation. The Hancock team will translate your requirement into the appropriate system configuration.

Appendix

Glossary

Term	Definition
Allocation	A funding source in Hancock Software — a pool of money from a specific program (DOE WAP, LIHEAP, utility rebate, IRA HOMES, etc.) that pays for measures installed in the program
AMI	Area Median Income — a federal income benchmark used to determine eligibility for IRA HOMES/HEAR and other income-qualified programs
Assessment	The on-site energy audit conducted by a field assessor; the

Term	Definition
	first field visit in the program workflow
BPI-2400	Building Performance Institute standard for whole-home energy audits; the energy modeling methodology used by Mint Mobile
Direct Install Measure (ISM)	A small energy efficiency upgrade (e.g., faucet aerator, LED bulb, door sweep) installed by the assessor during the audit visit
Deferral	A project status indicating that work cannot proceed, with a recorded reason (e.g., health hazard, customer refusal, structural issue)
HEAR	Home Electrification and Appliance Rebates — an IRA-funded rebate program for electrification upgrades
HOMES	Home Owner Managing Energy Savings — an IRA-funded rebate program for whole-house energy improvements; requires verified savings of 20%+
HPC	Home Performance Contractor — a contractor who conducts energy audits and installs direct install measures; may also coordinate major measure installation
HPXML	Home Performance XML — a standard data format for home energy assessment data; Hancock supports HPXML v4 export
IIC	Independent Installation Contractor — a contractor who performs major measure installation (insulation, air sealing, etc.) based on work orders

Term	Definition
Incentive	The portion of a measure's cost covered by the program; the remainder is the customer's cost
Invoice	A payment request created by a contractor for completed work; invoices go through lead vendor review before reaching the PA for payment
Energy Efficiency Organization	An organization that manages a network of contractors on behalf of the PA/utility; responsible for work order creation and invoice approval
Major Measure	A larger energy efficiency upgrade (insulation, air sealing, HVAC replacement, etc.) that is recommended during the audit but installed later by an IIC via a work order
Mint Mobile	Hancock's companion field application for conducting on-site energy assessments, recording installations, and running inspections offline
Program Administrator	Program Administrator — the utility or agency at the top of the organizational hierarchy that funds and oversees the energy efficiency program
Price Set	A configuration grouping that defines measure costs, labor rates, and utility incentive amounts for a specific organization or utility
Project	The central record in Hancock Software representing all work to be performed for a single customer; created from a qualified application
Quality Assurance	A project is assigned to an state or program level inspector based on

Term	Definition
	the accuracy and completeness of their invoice documentation and installation records
QCI	Quality Control Inspector — a role for conducting formal post-installation inspections
Qualification	The process of running an application against program eligibility rules to determine which funding sources a customer qualifies for
Recall or Callback Work Order	A work order created automatically when an inspection rejects a measure; assigned back to the original contractor to correct the deficiency
Roadblock	A condition identified during assessment (e.g., knob-and-tube wiring) that prevents major measure installation until resolved
Rule Set	The collection of eligibility and validation rules assigned to an allocation; controls which customers qualify and what work is eligible for reimbursement
WAP	Weatherization Assistance Program — the federal DOE program that funds energy efficiency improvements for low-income households

Frequently Asked Questions

Q: Can I use Mint Mobile on an Android device? A: Mint Mobile officially supports iOS (iPad recommended), Windows tablets, and Windows desktops. Mint Mobile is not supported on Androids.

Q: What happens if I lose my internet connection mid-assessment in Mint Mobile? A: Nothing — Mint Mobile is designed to work fully offline. All data entry, energy modeling, and document generation work without a connection. Your data is saved locally on the device and uploads automatically the next time you sync.

Q: Can a customer apply for the program online without calling our office? A: Yes, if your program has the customer self-intake portal enabled. Customers can submit an application through a link on your utility's website. Submissions appear in Hancock Software for your intake team to review and process.

Q: A qualification check failed but I think the customer should qualify — what do I do? A: Use the **Request Approval** function on the qualification results screen to submit an exception request to your lead vendor. Include a note explaining the reason. The lead vendor will review and can approve the override.

Q: A contractor declined a work order — who sees that? A: The decline and the stated reason are visible to the organization who created the work order. The work order returns for reassignment.

Q: Can more than one contractor work on the same project? A: Yes. A single project can have multiple work orders, each assigned to a different contractor. However, each contractor can only see and invoice for the specific measures on their work order.

Q: What's the difference between an invoice and an allocation invoice? A: A organization or agency **invoice** is created for the work they performed on a single project. An **allocation invoice** is created by the Program Administrator / utility or state and bundles all approved invoices for a given funding source into one payment request sent to the funding agency.