

Generating and Completing Forms

Last Updated: 12/13/2021

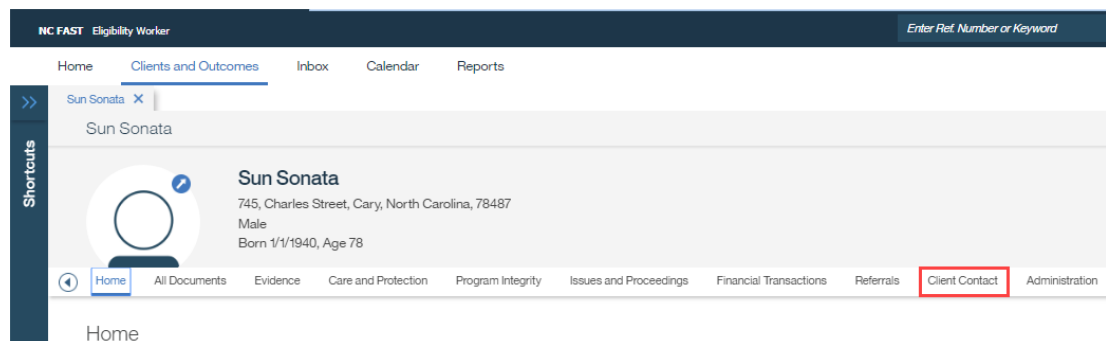
Overview

This job aid describes how to generate and complete forms. There are several locations to complete forms - the Person level, Case level and Application level. This procedure includes steps for each level.

Step-by-Step Instructions

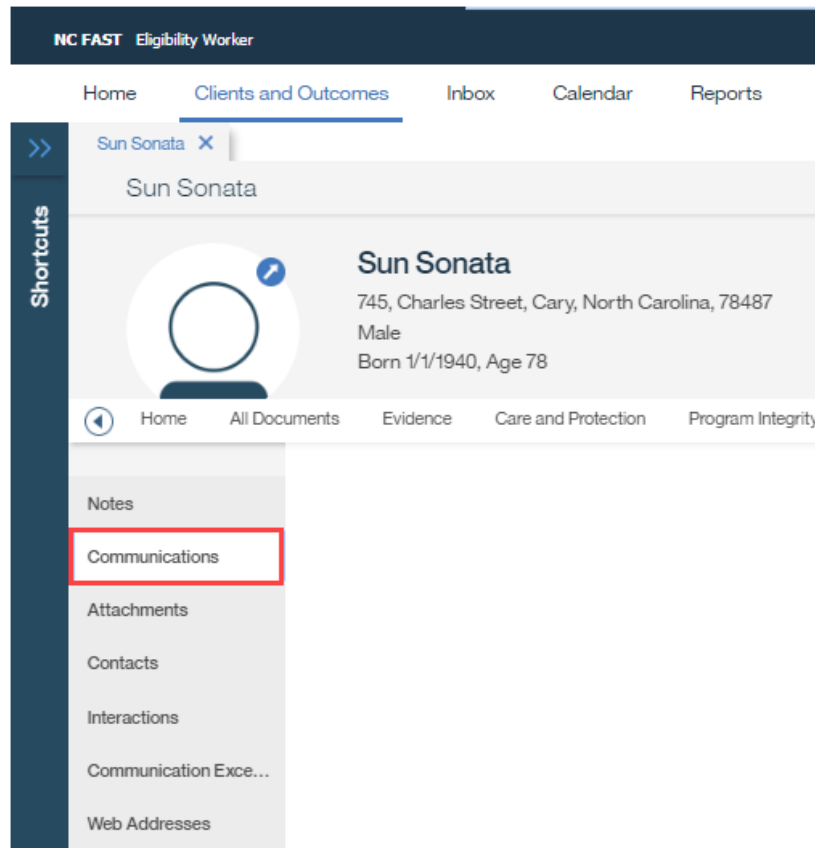
Person Level Communication

1. Navigate to the Person page. Click the **Client Contact** tab.

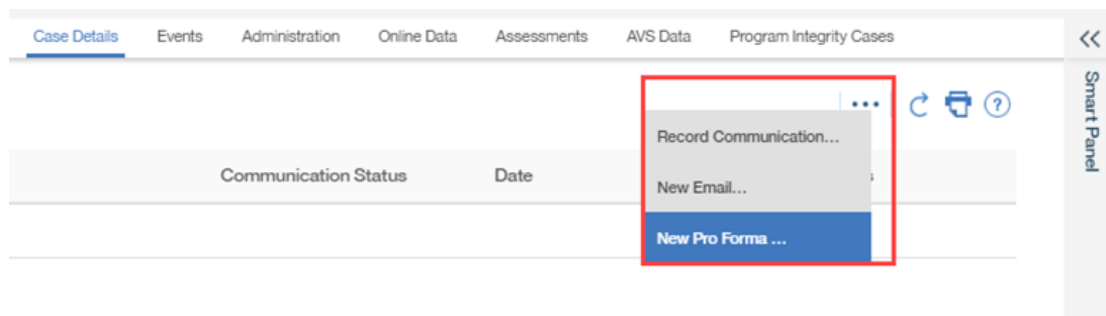


Note: For navigation steps to the Person page, refer to *Searching for Persons* job aid.

2. The Client Contact Notes page displays. Click the **Communications** folder.



3. The Communications page displays. Click the **Page Actions Menu** then select **New Pro Forma**.



4. The New Pro Forma Communication pop-up appears. Enter and select the applicable data then click Next.

New Pro Forma Communication ? ×

* required field

Specify the Correspondent ▼

Client Is Correspondent ☐

Contact For Client

Participant Q ×

If the correspondent is not registered on the system, please enter the correspondent's name in the correct field.

Correspondent Name

Next **Cancel**

- The next New Pro Forma Communication pop-up appears. Click the **Type** drop-down menu, select the applicable option then click **Search**.

New Pro Forma Communication ? ×

* required field

Communication Type ▼

Type ▼

Search **Reset**

Search Results ▼

Action	Pro Forma Type	Locale
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- The search results display. In the Action column, click the applicable **Select** hyperlink.

New Pro Forma Communication



* required field

Communication Type

Type

Search

Reset

Search Results

Action	Pro Forma Type	Locale
Select	DMA-5095 Medicaid / Work First Notice of Inquiry	English (United States)
Select	DMA-5095 Medicaid / Work First Notice of Inquiry	Spanish
Select	DMA-4037 Disability Determination Transmittal	English (United States)
Select	DMA-5028 Authorization to Disclose Information	English (United States)

Cancel

- The New Pro Forma Communication pop-up appears. Click the **Select Address** drop-down menu, select the applicable address then click **Save**.

Note: If the applicable address is not found in the **Select Address** drop-down menu, the address can be entered manually.



New Pro Forma Communication



* required field

Name Sun Sonata Correspondent Type Client

Please select an existing address or enter new address details.

Select Address

Apt/Suite Street 1
Street 2 City
County State
Zip

Associated Files

File Location File Reference
Document Location Document Reference

Comments

Previous Save Cancel

8. When the selected correspondence is editable, the **Edit** Interactive Pro Forma Communication pop-up appears. Enter the applicable data then click **Save**.

Edit Interactive Pro Forma Communication



* required field

Medicaid/Work First Notice of Inquiry

General Information and Reason for Inquiry (Caseworker completes)

Case Name:	<input type="text" value="Sun Sonata"/>	Case reference:	<input type="text" value="960235695M"/>	Date:	<input type="text" value="10-24-2018"/>
Address Line1:	<input type="text" value="Charles Street"/>	Apt Suite:	<input type="text" value="745"/>	State:	<input type="text" value="NC"/>
Address Line2:	<input type="text"/>	City:	<input type="text" value="Cary"/>	Zip:	<input type="text" value="78487"/>
Phone Number:	<input type="text" value="784-"/> <input type="text" value="692-9285"/>				
1. Worker's Name:	<input type="text" value="NCFast USER22240"/>				
Phone Number:	<input type="text" value="919-"/> <input type="text" value="707-4012"/>				

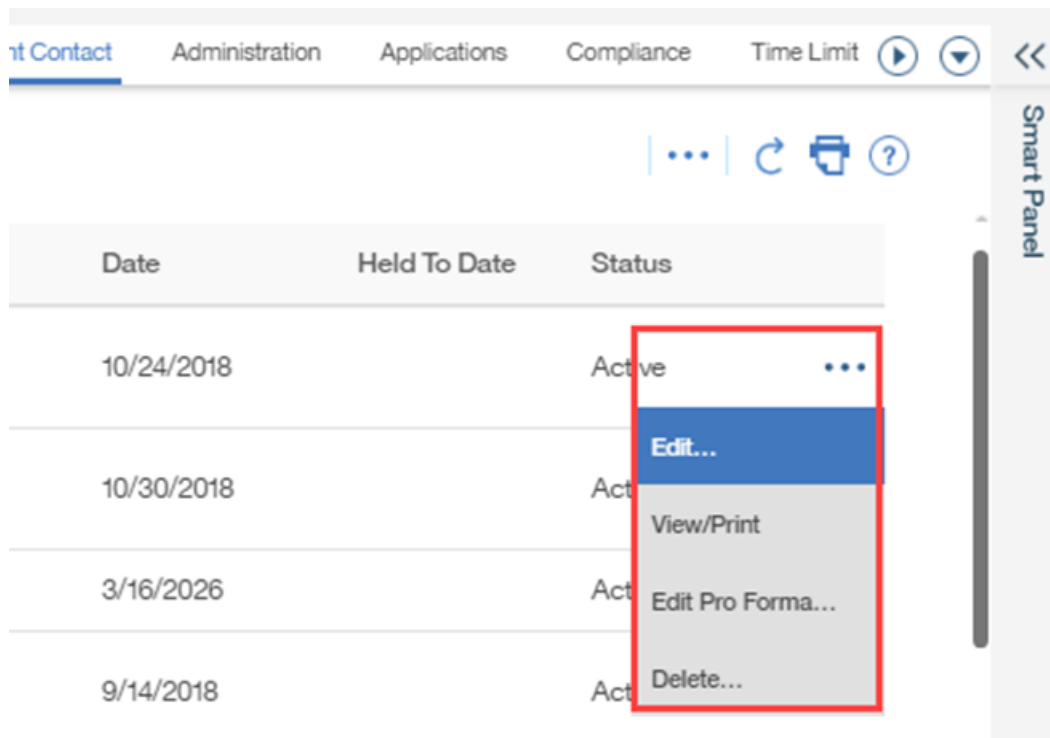
2. Check the programs discussed with the applicant and the referrals made:

<u>Discussed</u>	<u>Referred</u>		<u>Discussed</u>	<u>Referred</u>	
<input type="checkbox"/>	<input type="checkbox"/>	Work First Family Assistance	<input type="checkbox"/>	<input type="checkbox"/>	Medical Assistance for Adults
<input type="checkbox"/>	<input type="checkbox"/>	Work First Family Assistance - Emergency Assistance	<input type="checkbox"/>	<input type="checkbox"/>	Medical Assistance for Infants and Children

Notes:

- When the selected correspondence is not editable, the Communication page displays (refer to Steps 9-11 below).
- When the Communication Status displays *Draft-Central Print*, the notice or form will be sent by the Central Print Facility. Once the notice or form has been sent to Central Print in the overnight file, the Communication Status will **systematically** update to *Sent-Central Print*. To date a notice or form for the current day, caseworkers must print the notice or form, manually change the Communication Status to *Sent* (using the steps below) and mail the notice or form. Changing the Communication Status from *Draft-Central Print* to *Sent* will keep the notice or form from being mailed from Central Print. Remember to print and mail copies to Authorized Reps when applicable.
- If the form or notice is generated in error and displays with a status of *Draft-Central Print*
 - Click the **List Actions Menu** for the form
 - Select **Edit** to ensure the Communication status shows *Draft* then click **Save**
 - The form will now show a status of *Draft*

- To Delete the form, once showing in *Draft* status
 - i. Click the **List Actions Menu** then select **Delete**
 - ii. The Delete pop-up appears
 - iii. Select **Yes**
 - iv. The form is removed from the Communications list or shows with a status of *Cancelled*
 - When the Communication Status displays *Draft*, the form must be manually sent by the caseworker. Once the form is printed, the caseworker must update the Communication Status to *Sent* (using the steps below). Remember to print and mail copies to Authorized Reps when applicable.
9. The Communications page displays. Click the applicable **List Actions Menu** then select **Edit**.



10. The Edit Pro Forma Communication pop-up appears. From the **Communication Status** drop down, select **Sent** then click **Save**.

Edit Pro Forma Communication



* required field

Correspondent Name: Sun Sonata

Address *: 745, Charles Street, Cary, North Carolina, 78487

Communication Status: Draft

Date Sent: 10/24/2018

Associated Files: Draft - Electronic Communication

File Location: Sent

Document Location:

Document Reference:

Comments:

Save Cancel

11. The Communications page displays the Communication Status column as *Sent* status.

NC FAST Eligibility Worker Enter Ref. Number or Keyword

Home Clients and Outcomes Inbox Calendar Reports

Sun Sonata X

Sun Sonata

Sun Sonata

745, Charles Street, Cary, North Carolina, 78487
Male
Born 1/1/1940, Age 78

Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings Financial Transactions Referrals Client Contact Administration

Notes

Communications

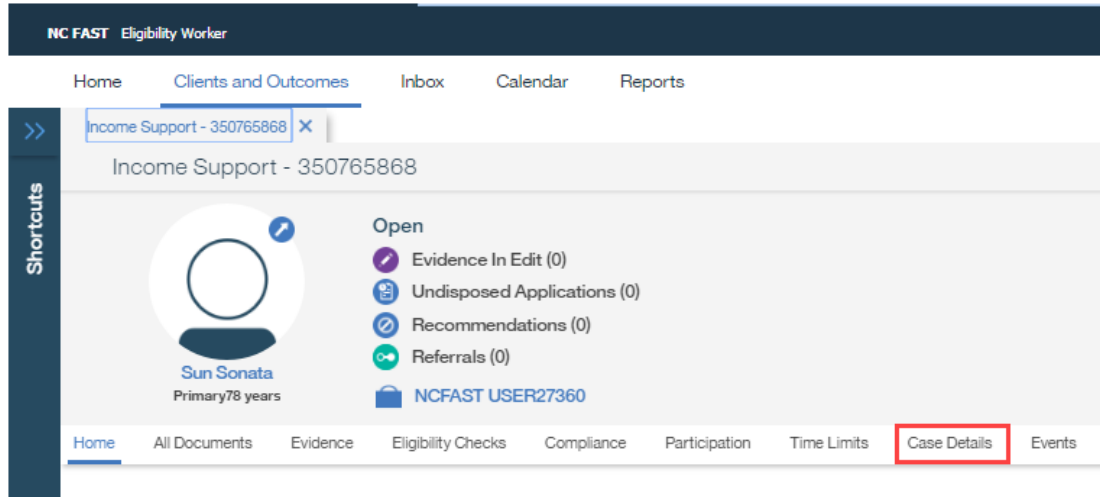
Attachments

Contacts

Subject	Type	Name	Communication Status	Date
DMA-5095 Medicaid / Work First Notice of Inquiry	Interactive Pro Forma	Sun Sonata	Sent	10/24/2018

Case Level Communication

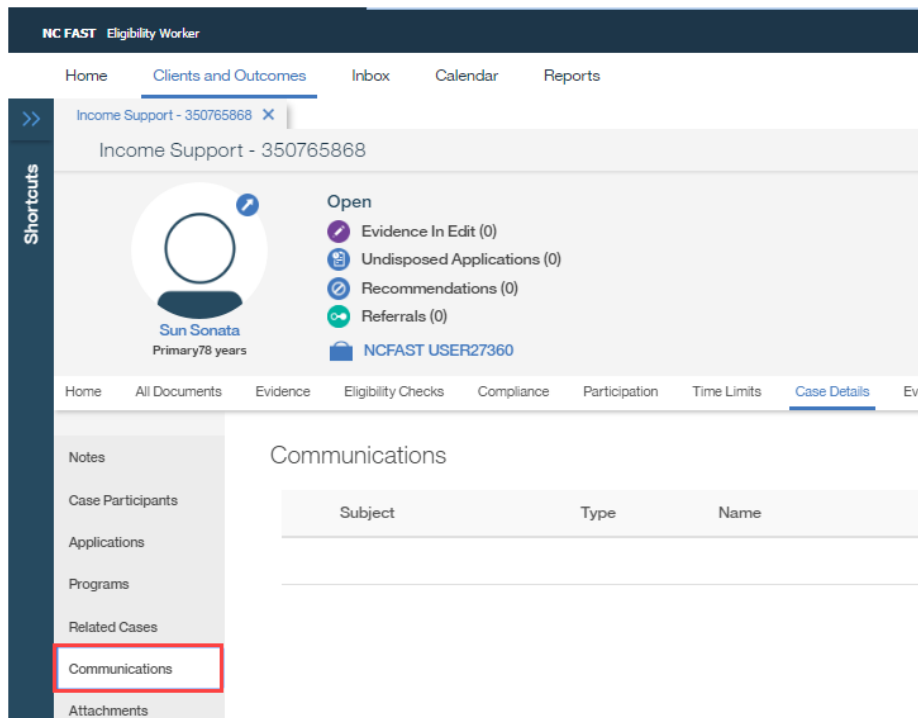
1. Navigate to the Income Support Integrated Case, Income Support Product Delivery Case (PDC) and Insurance Affordability PDC level. Click the **Case Details** tab.



The screenshot shows the NC FAST Eligibility Worker interface. The top navigation bar includes 'Home', 'Clients and Outcomes', 'Inbox', 'Calendar', and 'Reports'. The 'Clients and Outcomes' tab is active, showing a search bar with 'Income Support - 350765868' and a list of shortcuts. The 'Case Details' tab is highlighted in the bottom navigation bar. The main content area displays the client's profile for 'Sun Sonata', Primary 78 years, and a list of open items: Evidence In Edit (0), Undisposed Applications (0), Recommendations (0), and Referrals (0). The user 'NCFast USER27360' is logged in.

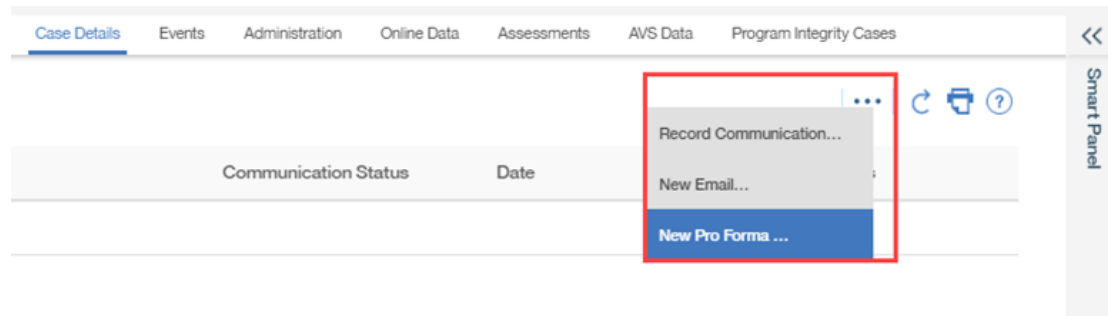
Note: For Insurance Affordability **Integrated Cases (IAIC)** click the **Contact** tab. For navigation steps to the Integrated Case level, refer to *Searching for Cases* job aid.

2. The Notes page displays. Click the **Communications** folder.



The screenshot shows the NC FAST Eligibility Worker interface. The top navigation bar includes 'Home', 'Clients and Outcomes', 'Inbox', 'Calendar', and 'Reports'. The 'Clients and Outcomes' tab is active, showing a search bar with 'Income Support - 350765868' and a list of shortcuts. The 'Case Details' tab is highlighted in the bottom navigation bar. The main content area displays the client's profile for 'Sun Sonata', Primary 78 years, and a list of open items: Evidence In Edit (0), Undisposed Applications (0), Recommendations (0), and Referrals (0). The user 'NCFast USER27360' is logged in. The 'Notes' section is expanded, showing a list of folders: Notes, Case Participants, Applications, Programs, Related Cases, **Communications**, and Attachments. The 'Communications' folder is highlighted in red.

- The Communications page displays. Click the **Page Actions Menu** then select **New Pro Forma**.



- The New Pro Forma Communication pop-up appears. Enter and select the applicable data then click **Next**.

New Pro Forma Communication ? ×

* required field

Correspondent ▼

If the correspondent is a case participant, please select from below.

Case Participant

If the correspondent is registered on the system, please select from below.

Participant Q ×

If the correspondent is not registered on the system, please enter the correspondent name below.

Correspondent Name

Regarding ▼

Case Member

Next **Cancel**

- The next New Pro Forma Communication pop-up appears. Click the **Type** drop-down menu, select the applicable option then click **Search**.

New Pro Forma Communication

Type

[Search](#)

Search for a pro forma type for Selection

Action	Pro Forma Type
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- The search results display. In the Action column, click the applicable **Select** hyperlink.

New Pro Forma Communication

[?](#) [×](#)

* required field

Type

[Search](#)

Search for a pro forma type for Selection

Action	Pro Forma Type	Locale
Select	DSS-8551 Notice of Eligibility, Denial, or Pending Status	English (United States)
Select	DSS-8551 Notice of Eligibility, Denial, or Pending Status	Spanish
Select	DSS-8642 Explanation of Disqualification	English (United States)
Select	DSS-8642 Explanation of Disqualification	Spanish
Select	DMA-5095 Medicaid / Work First Notice of Inquiry	English (United States)
Select	DMA-5095 Medicaid / Work First Notice of Inquiry	Spanish
Select	DMA-5104 Notice of Incomplete Application	English (United States)
Select	DMA-5104 Notice of Incomplete Application	Spanish
Select	DMA-4037 Disability Determination Transmittal	English (United States)

[Cancel](#)

- The New Pro Forma Communication page displays. Click the **Select Address** dropdown menu, select the applicable address then click **Save**.

Note: If the applicable address is not found in the drop-down menu, the address can be entered manually.

New Pro Forma Communication



* required field

Name Sun Sonata Correspondent Type Client

Please select an existing address or enter new address details.

Select Address

Apt/Suite Street 1
Street 2 City
County State
Zip

Associated Files

File Location File Reference
Document Location Document Reference

Comments

Previous

Save

Cancel

- When the selected correspondence is editable, the **Update** Interactive Pro Forma Communication pop-up appears. Enter applicable data then click **Save**.



NC FAST

North Carolina Families Accessing
Services through Technology

Update Interactive Pro Forma Communication



* required field

Notice of Incomplete Application

Dear Sun Sonata :

Recently you sent an application for health care coverage to Johnston County Department of Social Services. We are not able to accept your application for the reasons shown below. Please complete these items before sending the application back in the enclosed envelope.

It is important that you return your application as soon as possible. If you are found eligible for NC Health Choice, your benefits cannot begin until the month we receive a complete application. If you have questions, please feel free to contact us at the telephone number shown below. Thank you.

Your application cannot be accepted because:

☐ You did not sign the form.

☐ We need the full name / date of birth / sex of

☐ We need a complete mailing address

☐ We cannot read your application. Please come to our office for assistance or ask the health department or a friend to help you complete the enclosed form.

☐ We also need the following to process your application:

Save

Cancel

Notes:

- When the selected correspondence is not editable, the Communication page displays (refer to Steps 9-11 below).
- When the Communication Status displays *Draft-Central Print*, the notice or form will be sent by the Central Print Facility. Once the notice or form has been sent to Central Print in the overnight file, the Communication Status will systematically update to *Sent-Central Print*. To date a notice or form for the current day, caseworkers must print the notice or form, manually change the Communication Status to *Sent* (using the steps below) and mail the notice or form. Changing the Communication Status from *Draft-Central Print* to *Sent* will keep the notice or form from being mailed from Central Print. Remember to print and mail copies to Authorized Reps when applicable.
- If the form or notice is generated in error and displays with a status of *Draft-Central Print*
 - i. Click the **List Actions Menu** for the form
 - ii. Select **Edit** to ensure the Communication status shows *Draft* then click **Save**

iii. The form will now show a status of *Draft*

- To Delete the form, once showing in *Draft* status

i. Click the **List Actions Menu** then select **Delete**

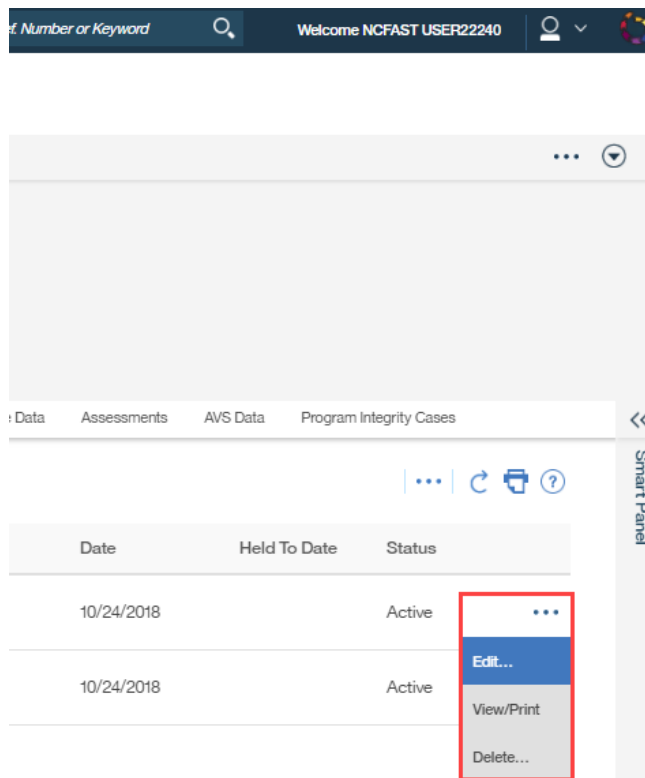
ii. The Delete pop-up appears

iii. Select **Yes**

iv. The form is removed from the Communications list or shows with a status of *Cancelled*

- When the Communication Status displays *Draft*, the form must be manually sent by the caseworker. Once the form is printed, the caseworker must update the Communication Status to *Sent* (using the steps below). Remember to print and mail copies to Authorized Reps when applicable.

9. The Communications page displays. Click the applicable **List Action Menu** then select **Edit**.



10. The Edit Pro Forma Communication pop-up appears. Click the **Communication Status** drop down, select **Sent** then click **Save**.

Edit Pro Forma Communication



* required field

Correspondent Name: Sun Sonata

Address *: 745, Charles Street, Cary, North Carolina, 78487

Communication Status: Draft

Date Sent: 10/24/2018

Associated Files:

- Draft - Electronic Communication
- Sent
- Sent - Electronic Communication

File Location:

Document Location:

Document Reference:

Comments:

Save Cancel

11. The Communications page displays the Communication Status column as *Sent* status.

NC FAST Eligibility Worker

Enter Ref. Number or Keyword

Home Clients and Outcomes Inbox Calendar Reports

Income Support - 350765868

Income Support - 350765868

Open

- Evidence In Edit (0)
- Undisposed Applications (0)
- Recommendations (0)
- Referrals (0)
- NCFast USER27360

Home All Documents Evidence Eligibility Checks Compliance Participation Time Limits Case Details Events Administration Online Data Assessments

Notes

Case Participants

Applications

Programs

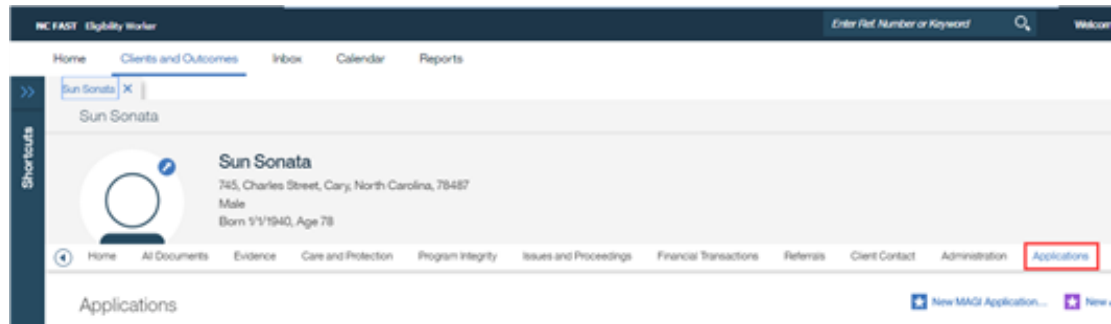
Related Cases

Communications

Subject	Type	Name	Communication Status	Date
DMA-5104 Notice of Incomplete Application	Interactive Pro Forma	Sun Sonata	Sent	10/24/2018

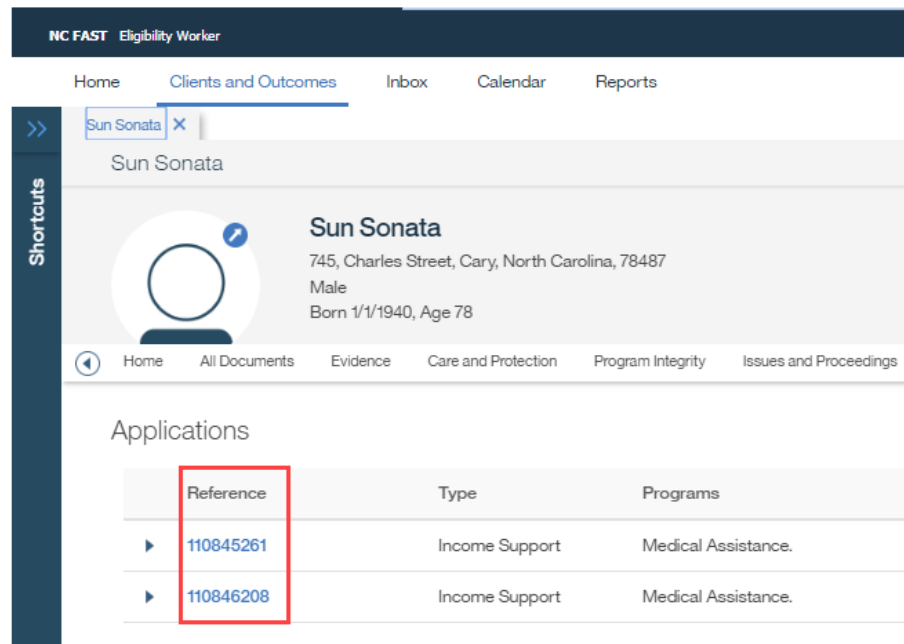
Application-Level Communication

1. Navigate to the Person page. Click the Applications tab.



Note: For navigation steps to the Person page, refer to *Searching for Persons* job aid.

2. Select the applicable application Reference **hyperlink**.



3. The Income Support Application page displays. Click the **Administration** tab.

Note: For Insurance Affordability Application Cases (IAAC), click the **Administration** tab.

NC FAST Eligibility Worker

Home Clients and Outcomes Inbox Calendar Reports

Sun Sonata X Income Support Application (110845261) X Income Support Application (111462696) X

Income Support Application (110845261)

Sun Sonata

Primary
78 years

Income Support Application

Application Date 3/26/2015
Preferred Contact Not Requested
Interpreter Language Not Requested
Programs Medical Assistance.

ers Evidence Related Cases Eligibility Checks Ineligibility Period Appeals Work Eligibility **Administration** Online Data

Notes

Attachments

Communications

Subject	Text	Entered By
---------	------	------------

4. The Notes page displays. Click the **Communications** folder.

NC FAST Eligibility Worker

Home Clients and Outcomes Inbox Calendar Reports

Sun Sonata X Income Support Application (110845261) X Income Support Application (111462696) X

Income Support Application (110845261)

Sun Sonata

Primary
78 years

Income Support Application

Application Date 3/26/2015
Preferred Contact Not Requested
Interpreter Language Not Requested
Programs Medical Assistance.

ers Evidence Related Cases Eligibility Checks Ineligibility Period Appeals Work Eligibility Administration



Notes

Attachments

Communications

Subject	Text
---------	------

5. The Communications page displays. Click the **Page Actions Menu** then select **New Pro Forma**.


Enter Ref. Number or Keyword Welcome NCFast USER22240  




tion

ted
ted
istance.

110845261

Submitted
Issues (0)

 NCFast USER27360

Administration Online Data Assessments AVS Data Program Integrity Cases   

Communication Status	Date



Record Communication...

New Email...

New Pro Forma ...

Smart Panel

- The New Pro Forma Communication pop-up appears. Enter and select applicable data then click **Next**.

New Pro Forma Communication  



* required field

Correspondent

If the correspondent is a application participant, please select from below.

Application Participant

If the correspondent is registered on the system, please select from below.



Participant Education Institute  

If the correspondent is not registered on the system, please enter the correspondent name below.

Correspondent Name

Regarding

Client

- The next New Pro Forma Communication pop-up appears. Click the **Type** drop-down menu, select the applicable option then click **Search**.

New Pro Forma Communication



* required field

Type

Search

Search for a Pro forma type for Selection

Action	Pro Forma Type	Locale

Cancel

- The search results display. In the Action column, click the applicable **Select** hyperlink.

New Pro Forma Communication



* required field

Type

Search

Search for a Pro forma type for Selection

Action	Pro Forma Type	Locale
Select	DSS-8586 Notice of Disqualification	English (United States)
Select	DSS-8586 Notice of Disqualification	Spanish

Cancel

- The New Pro Forma Communication address section displays. Click the **Select Address** dropdown menu, select the applicable address then click **Save**.

Note: If the applicable address is not found in the drop-down menu, the address can be entered manually.



NC FAST

North Carolina Families Accessing
Services through Technology

New Pro Forma Communication



* required field

Correspondent Name Sun Sonata

Correspondent Type

Client

Please select an existing address or enter new address details.

Select Address

Apt/Suite

Street 1

Street 2

City

County

State

Zip

Associated Files

File Location

File Reference

Document Location

Document Reference

Comments

Previous

Save

Cancel

10. When the selected correspondence is editable, the **Edit** Interactive Pro Forma Communication pop-up appears. Enter the applicable data then click **Save**.

Edit Interactive Pro Forma Communication



* required field

Disability Determination Transmittal

Received in DDS:

Name of Applicant: Sun Sonata

Aid Category:

Address of Applicant: 745 Charles Street Cary NC 78487

Application Date:

Worker Phone: (919-) 707-4012

Application Number:

Date Submitted:

Applicant SSN: 123548796

Applicant DOB: 01-01-1940

Save

Cancel

Notes:

- When the selected correspondence is not editable, the Communication page displays (refer to Steps 11-13 below).
- When the Communication Status displays *Draft-Central Print*, the notice or form will be sent by the Central Print Facility. Once the notice or form has been sent to Central Print in the overnight file, the Communication Status will systematically update to *Sent-Central Print*. To date a notice or form for the current day, caseworkers must print the notice or form, manually change the Communication Status to *Sent* (using the steps below) and mail the notice or form. Changing the Communication Status from *Draft-Central Print* to *Sent* will keep the notice or form from being mailed from Central Print. Remember to print and mail copies to Authorized Reps when applicable.
- If the form or notice is generated in error and displays with a status of *Draft-Central Print*
 - i. Click the **List Actions Menu** for the form
 - ii. Select **Edit** to ensure the Communication status shows *Draft* then click **Save**
 - iii. The form will now show a status of *Draft*
- To Delete the form, once showing in *Draft* status
 - i. Click the **List Actions Menu** then select **Delete**
 - ii. The Delete pop-up appears
 - iii. Select **Yes**
 - iv. The form is removed from the Communications list or shows with a status of *Cancelled*
- When the Communication Status displays *Draft*, the form must be manually sent by the caseworker. Once the form is printed, the caseworker must update the Communication Status to *Sent* (using the steps below). Remember to print and mail copies to Authorized Reps when applicable.

11. The Communications page displays. Click the applicable **List Action Menu** then select **Edit**.

ation Online Data Assessments AVS Data Program Integrity Cases			
Communication Status	Date	Held To Date	Status
Draft	10/24/2018		Active
Draft	10/24/2018		Active

- ...
- Edit...
- View/Print
- Delete...

12. The Edit Pro Forma Communication pop-up appears. From the *Communication Status* drop down, select **Sent** then click **Save**.

Edit Pro Forma Communication



* required field

Correspondent Name Sun Sonata

Address * 745, Charles Street, Cary, North Carolina, 78487

Communication Status Draft Date Sent 10/24/2018

Associated Files

File Location

Document Location Document Reference

Comments

Save

Cancel


13. The Communications page displays the Communication Status column as *Sent* status.

NC FAST Eligibility Worker Enter Ref. Num.

Home Clients and Outcomes Inbox Calendar Reports

Sun Sonata X Income Support Application (110845261) X Income Support Application (111462696) X

Income Support Application (110845261)

Sun Sonata  Primary 78 years

Income Support Application

Application Date 3/26/2015
Preferred Contact Not Requested
Interpreter Language Not Requested
Programs Medical Assistance.

ers Evidence Related Cases Eligibility Checks Ineligibility Period Appeals Work Eligibility Administration Online Data Assessments

Notes
Attachments
Communications
Interviews
Users

Communications

Subject	Type	Name	Communication Status
DMA-5122 Community Spouse Resource Protection Worksheet	Pro Forma	Sun Sonata	Sent
DMA-9002 Carolina ACCESS Medical Exemption Request	Pro Forma	Sun Sonata	Sent