

Application to Case

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Overview

This job aid describes how to enter and process an application to develop a case.

Step-by-Step Instructions

Log Into NC FAST		
Login	Use your NCID and password to log in to NC FAST	<input type="checkbox"/>
Intake (For an Application)		
Search for Person	<ol style="list-style-type: none"> 1. Enter First name, Last Name, and Gender to search for a Person. 2. Navigate to Clients and Outcomes tab, click on Searches shortcut, and Person hyperlink to access the Person Search. <p>Notes:</p> <ul style="list-style-type: none"> • For additional information on Searching for a Person, refer to the <i>Searching for Persons</i> job aid. • If Person is not found, fully register Person using First Name, Last Name, Gender, and other applicable information. • Add SSN and mark primary on person page under evidence tab. • Ensure all clients on the Application are fully registered as Persons in NC FAST prior to starting the application. 	<input type="checkbox"/>

	<p>Note: For additional information on Registering a Person, please refer to the <i>Registering Persons</i> job aid.</p>	
<p>Start Application</p>	<p>Notes:</p> <ul style="list-style-type: none"> • If the Head of Household already has an existing integrated case, refer to the <i>When Separate Income Support or Insurance Affordability Cases are Required in NC FAST</i> job aid before keying a new application. • If beginning a MAGI application, refer to the <i>Streamlined Application to Case & Key Differences Checklist</i> job aid. <ul style="list-style-type: none"> a. To begin an application, go to the head of household's person page, click the Applications tab. b. Click the New Application hyperlink then select the application checkboxes for the desired programs. • Complete the application by entering information About the Claimant, Claimant's Home, Benefits, Income, Resources, Expenses and review answers in the Finish section. 	<input type="checkbox"/>
<p>Submit Application</p>	<ol style="list-style-type: none"> 1. Once the worker gets to the last page of the application: <ul style="list-style-type: none"> • Click the Rights and Responsibilities hyperlink in the New Application pop-up (before clicking the Submit button) to access Rights and Responsibilities form. • Print all six pages of Rights and Responsibilities, review the Rights and Responsibilities with applicant, and have client sign the signature page. (First five pages go to applicant; DSS 	<input type="checkbox"/>

	<p>keeps the signature page). If electronic signature is available, the caseworker may use this technology.</p> <ul style="list-style-type: none"> • Print the Medicaid Transportation Notice of Rights, review with applicant, and obtain applicant signature. Both the DSS and the applicant will receive a copy of this document. • If client asks for a copy of Application PDF, the caseworker can print out the IEG. Otherwise, they should just print the signature page. To do so, after the application is submitted navigate to the Applications tab, click the List Actions Menu next to the submitted Application then select View Application PDF to print a copy of the Application PDF and Signature Page. <p>Note from DMA: Remember that CCNC/CA enrollment information is not taken within the Medicaid application/IEG. Be sure to obtain this information to add it to the Primary Care Provider-NC Medicaid Direct evidence on the Evidence Dashboard prior to authorizing the application.</p> <p>Note from DSS: An interview must be scheduled in the system for every FNS application and recertification (if applicable). This includes clients interviewed on the day of the application. Refer to the <i>Scheduling an Interview</i> job aid.</p>	
Match Client	<ol style="list-style-type: none"> a. Perform the manual Match Client process for any applicants not matched during the automated process b. Navigate to the Clients tab from the Income Support Application, click the List Actions Menu next to the client then select Match Client or Potential Match from the drop-down menu to begin the manual Match process. <p>Notes:</p> <ul style="list-style-type: none"> • For additional information on 	<input type="checkbox"/>

	<p>matching a client, refer to the <i>Match Client</i> job aid.</p> <ul style="list-style-type: none"> If a Person Merge is required, refer to the <i>Completing Person Merge</i> job aid. 	
<p>Manage Evidence (Application Status = Submitted)</p>	<p>a. Resolve issues with evidence, edit existing evidence, or add new evidence. Mandatory evidence types must be added to process the application. Note: Refer to the <i>NC FAST Mandatory Evidence and Verifications</i> job aid to process an application.</p> <ul style="list-style-type: none"> Person Evidence <ul style="list-style-type: none"> Add a New or Existing ID Number - Navigate to the Person's page and click the Evidence tab then click the New hyperlink. Click the List Actions Menu then select Add. Application Evidence <ul style="list-style-type: none"> Add New Evidence - Navigate to the application Evidence tab, click the Page Actions Menu then select New Evidence from the drop-down menu. Click the List Actions Menu then select Add. Household Member Evidence. Edit this evidence. Regarding the <i>Applied for SSN</i> field use the following criteria: <ul style="list-style-type: none"> If the client does not have a SSN, but has applied for one select Yes. If the client does not have a SSN and has not applied for one select No. If the client has a SSN or is not required 	<input type="checkbox"/>

	<p>to apply for one select N/A.</p> <p>Note: Adding/updating evidence must be completed even if all verifications have not been received.</p> <p>Note from DMA: Remember that CCNC/CA enrollment information is not taken within the Medicaid application/IEG. It should be added within the Primary Care Provider-NC Medicaid Direct evidence on the Evidence Dashboard prior to authorizing the application.</p>	
Eligibility (For an Application)		
Request Online Data	<p>a. Gather online data for the evidence entered.</p> <p>Note: Online Data can only be pulled once per day. (Supervisors can pull when needed.)</p> <p>a. Click the Online Data tab then click the Request Online hyperlink.</p>	
Verify Evidence	<p>a. Ensure all necessary verifications received are added onto the client's Application and Person pages.</p> <ul style="list-style-type: none"> • Person Verifications: <ul style="list-style-type: none"> i. Go to the Person page then click the Evidence tab. ii. Click the List Actions Menu next to the ID number then select Add Proof. • Application Verifications: <ul style="list-style-type: none"> i. Click the Evidence tab (Evidence Dashboard) ii. Click the Verifications folder 	<input type="checkbox"/>

	<p>iii. Click the List Actions Menu next to the item to verify then select Add Proof.</p> <p>Note: Failure to enter mandatory verifications may result in an ineligible decision.</p>	
Check Eligibility	<p>a. Check eligibility to determine the eligible benefit amount for the client or to see if the client is ineligible for benefits.</p> <ul style="list-style-type: none"> Click the Eligibility Checks tab. Click the Check Eligibility hyperlink then click the applicable check box for program requested. 	<input type="checkbox"/>
Apply Changes (Activate Evidence)	<p>a. Applying Changes to evidence activates the evidence for the eligibility process. Evidence can be activated one piece at a time or all at once as a group.</p> <ul style="list-style-type: none"> Click the Evidence tab (Evidence Dashboard) Click the Page Actions Menu then select Apply Changes <p>Note: All received verifications should be added. Apply Changes to evidence, even if all verifications have not been entered.</p>	<input type="checkbox"/>
Mark Ready for Determination	<p>a. After eligibility is checked, mark Ready for Determination.</p> <ul style="list-style-type: none"> Click the Tab Actions Menu then select Ready for Determination. 	<input type="checkbox"/>
Authorize	<p>a. Authorize the case (if eligible) or Deny the case (if ineligible).</p> <p>Note:</p> <ul style="list-style-type: none"> If denying an FNS or CA Application for Missed Interview, refer to the <i>Denying a</i> 	<input type="checkbox"/>



	<p><i>Program job aid.</i></p> <ul style="list-style-type: none">• If denying Medical Assistance, navigate to the Administration tab then click the Communications folder to review the DSS-8109 notice for accuracy.• Click the Tab Actions Menu then select Authorize or Deny from the drop-down menu.	
Activate Online	<p>a. Activate the Product Delivery Case (PDC) online</p> <ul style="list-style-type: none">• Navigate to the newly-approved PDC. Click on the Tab Actions Menu then select Activate Online.	<input type="checkbox"/>
Outcome - Program Activated & Benefits Issued or Benefits Denied		