

Adding a New Client to Applications (Not Registered)

Last Updated: 07/03/2024

Last Reviewed: 07/03/2024

Table of Contents:

Overview	1
Step-by-Step Instructions.....	1
Manage Evidence	5

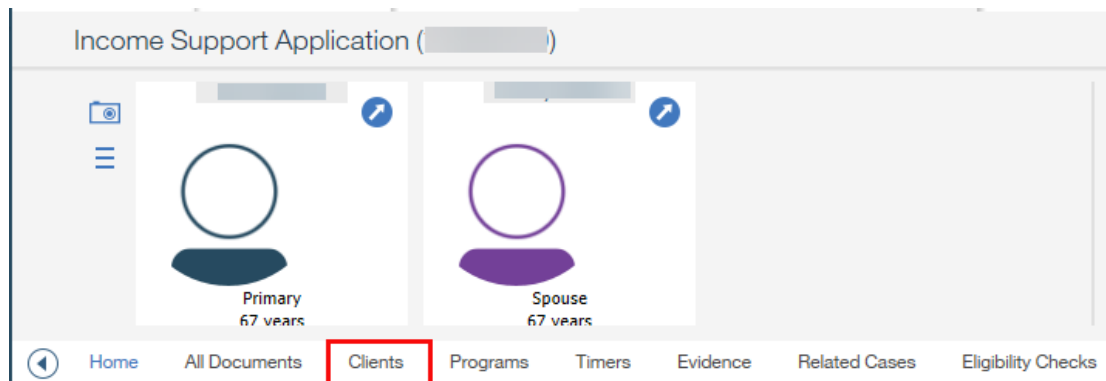
Overview

This job aid describes how to add a new client that has not been registered in NC FAST to an application.

Note: This job aid only applies to traditional applications.

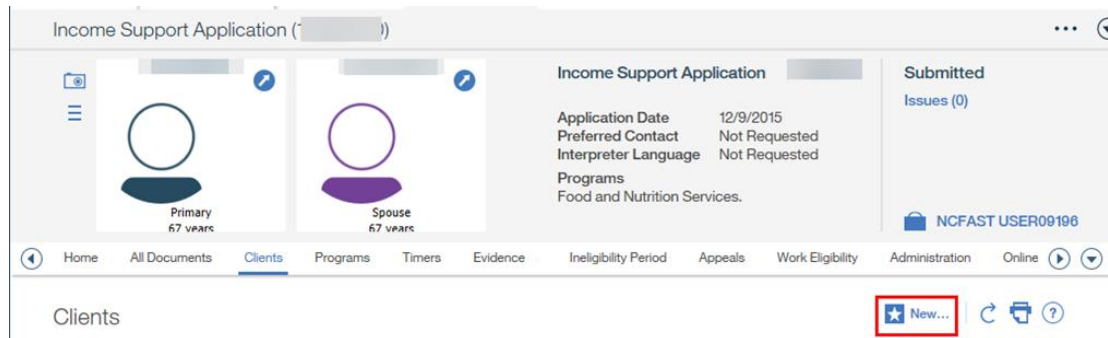
Step-by-Step Instructions

1. Navigate to the Income Support Application page. Click the **Clients** tab.



Note: For step regarding navigation to the Income Support Application, refer to *Searching for Applications* job aid.

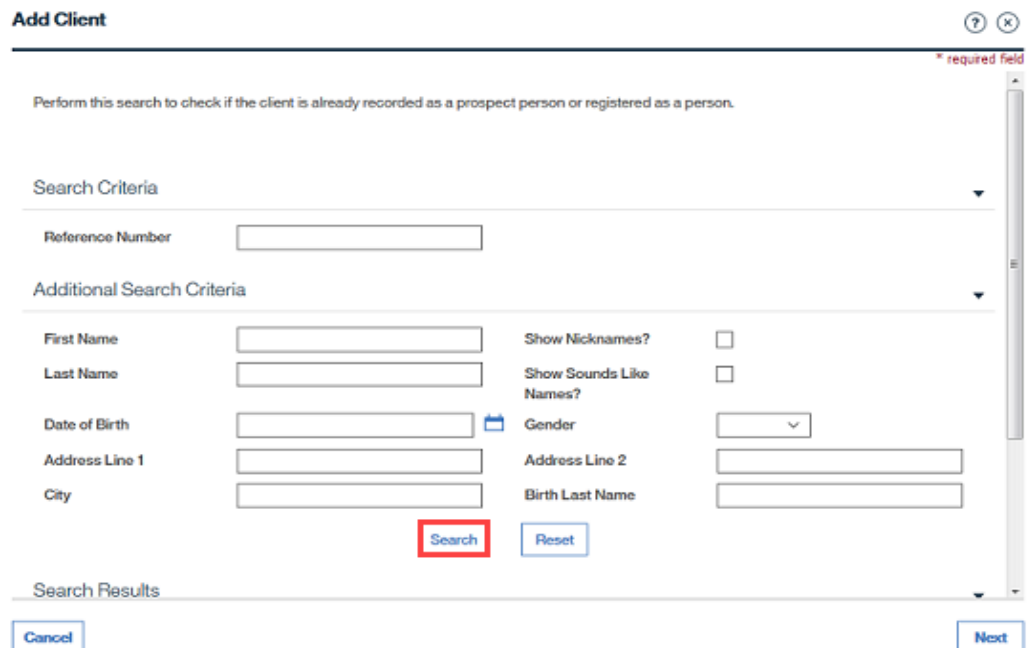
2. The Client page displays. Click the **New** hyperlink.



3. The Add Client pop-up appears. Enter and select the applicable information then click **Search**.

Note: Caseworkers should conduct four separate person searches to verify the correct person is found or selected:

- a. First Name, Last Name, Gender.
- b. First Name, Last Name, Gender, Date of Birth.
- c. SSN or CNDS ID, if the client has one.
- d. First Name (three letters), Last Name (three letters), Gender, Date of Birth.



4. The Search Results display.

Notes:

- If the Search Results display a registered person with Source NC FAST, refer to *Adding a New Previously Registered Client to Applications* job aid.
- If Search Results displays a Prospect Person with Source NC FAST or a person with Source CNDS, select applicable radio button then click **Next**.
- If Search Results do not display the person, click **Next**.

Add Client ? ✕

* required field

First Name Show Nicknames? ☐

Last Name Show Sounds Like Names? ☐

Date of Birth Gender

Address Line 1 Address Line 2

City Birth Last Name

Search Results

Name	Source	Address	Gender	Date of Birth
<input type="radio"/> Mindy Williams - 598425681	NCFast	123 Westmoore Dr., Raleigh, North Carolina, 27604	Female	1/1/1970
<input type="radio"/> MINDY R WILLIAMS - 291603671	CNDS		Female	8/21/1974
<input type="radio"/> MINDY D WILLIAMS -				

- The Add Client Registration pop-up appears. Enter and select the applicable data then click **Next**.

Note: When a person with Source CNDS is selected, the CNDS Person Information pop-up appears. Review CNDS information then click **Next** to get to the Add Client Registration pop-up.

Add Client

1 CNDS Person Information 2 **Registration** 3 Validate Primary Address 4 Validate Mailing Address 5 Finish

Step 2: Registration

* required field

Social Security Number (SSN)	B35444566	Title	
First Name *	RAY	Middle Name	
Last Name *	RAY	Suffix	
Initials		Birth Last Name	
Mother's Birth Last Name		Gender *	Male

Details

Date of Birth *	1/1/2000	Date of Death	
Registration Date *		Marital Status *	Single
Special Interest		Nationality	
Country of Birth		Heritage	

Cancel Back **Next**

6. The Validate Primary Address pop-up appears. Select the applicable data, then click **Next**.

Validate Address

1 CNDS Person Information 2 Registration 3 **Validate Primary Address** 4 Validate Mailing Address 5 Finish

Step 3: Select the suggested address returned by the system or the entered address.

1 A suggested address was not returned, to accept entered address please continue.

Suggested Address		Entered Address	
Apt/Suite	Address1	Apt/Suite	Address1
Address2	City	Address2	City
County	State	County	State
Zip		Zip	

Cancel Back **Next**

7. The Validate Mailing Address pop-up appears. Review the data, then click **Register**.

Validate Address

1 CNDS Person Information 2 Registration 3 Validate Primary Address 4 **Validate Mailing Address** 5 Finish

Step 4: Select the suggested address returned by the system or the entered address.

Suggested Address		Entered Address	
Apt/Suite	Address1	Apt/Suite	Address1
Address2	City	Address2	City
County	State	County	State
Zip		Zip	

Cancel Back **Register**

8. The Add Client Finish pop-up appears. Enter applicable data then click **Finish**.

Add Client

1 CND5 Person Information 2 Registration 3 Validate Primary Address 4 Validate Mailing Address 5 Finish

Step 5: Finish

* required field

Enter the date added and confirm the details of the client you are adding to the application.

Date Added

Client Details

First Name	RAY	Last Name	RAY
Date of Birth	1/1/2000	Reference	835444566
Gender	Male	Marital Status	Single

Contact

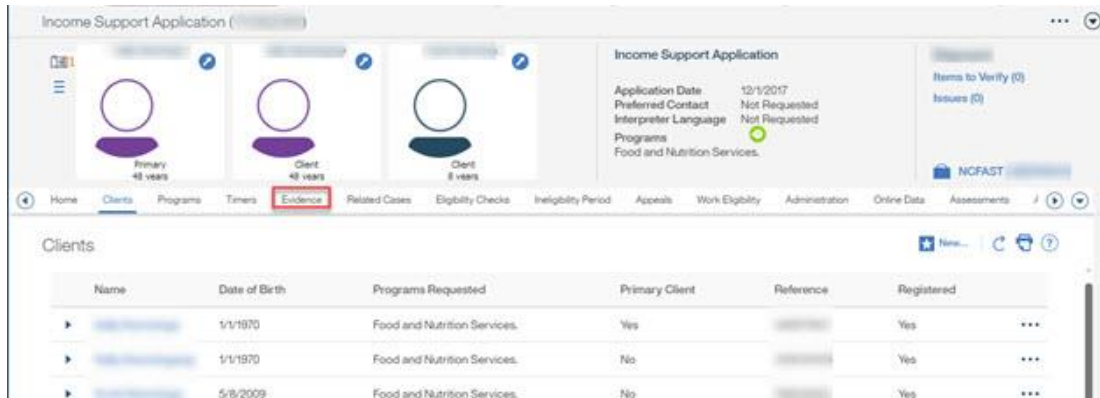
Address	1 Main Raleigh, Wake, North Carolina, 27707 United States	Phone Number	
---------	---	--------------	--

Cancel

Finish

Manage Evidence

1. The Income Support Application page displays. Click the **Evidence** tab.



Income Support Application ()

Application Date: 12/1/2017
Preferred Contact: Not Requested
Interpreter Language: Not Requested
Programs: Food and Nutrition Services.

Items to Verify (0)
Issues (0)

NCFAST

Home Clients Programs Timers **Evidence** Related Cases Eligibility Checks Ineligibility Period Appeals Work Eligibility Administration Online Data Assessments

Clients

Name	Date of Birth	Programs Requested	Primary Client	Reference	Registered
Primary 48 years	1/1/1970	Food and Nutrition Services.	Yes		Yes ***
Client 48 years	1/1/1970	Food and Nutrition Services.	No		Yes ***
Client 8 years	5/8/2009	Food and Nutrition Services.	No		Yes ***

Note: Household Member, Living Arrangement and Residency are a few of the basic evidence types required when adding a new client to an application. Additional evidence may be needed depending on the type of application. Refer to the *Minimum Mandatory Reference* job aid.

2. The Evidence Dashboard displays. Click the + to the right of Household Member evidence.

Dashboard

Adoption

- Adoption Payment

Alien

- Alien Sponsorship

Alien Sponsor

- Alien Sponsorship

Boarder



Child Immunization


Converted FSIS Benefit


FNS Authorized Representative




Foster Care



- Foster Care Payment

Head of Household  

Household Meal Group 

- Household Meal Group Member 



Household Member   

Household Relationship  


Incarceration

- The New Household Member Evidence pop-up appears. Enter and select the applicable information then click **Save**.

New Household Member Evidence

* required field



Received Date * 

Household Member Details





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




Household Member Participant

If the household member is not a case participant but is registered on the system, please select from below.

Household Member  

Additional Household Member Details

Citizen Status *	<input type="text"/>		
Veteran Status *	<input type="text"/>	Date DMA-5001 or Application Signed	<input type="text"/> 
Applied for S.S.N. *	<input type="text"/>	Date Use of SSN Rescinded	<input type="text"/> 
Start Date *	<input type="text"/> 	End Date	<input type="text"/> 

- The Evidence Dashboard displays. Click the + to the right of Living Arrangement evidence.


- The New Living Arrangement Evidence pop-up displays. Enter and select the applicable information then click **Save and Exit**.

Note: If doing multiple use **Save and Next**.






New Living Arrangement Evidence ? ×

① New Living Arrangement Evidence ② End Existing Living Arrangement Evidence

New Living Arrangement Evidence * required field





Received Date * 

Living Arrangement Details

Household Member *	<input type="text"/>	Nursing Home / Spouse in the Same Room	<input type="checkbox"/>
Arrangement Type *	Home (living with own family) 	Arrangement Status *	Permanent 
Start Date *	<input type="text"/> 	End Date	<input type="text"/> 
Probable End Date	<input type="text"/> 	Number of Meals per Day	<input type="text"/>
Addicted to Drugs or Alcohol	<input type="checkbox"/>	Living on a Reservation	<input type="checkbox"/>
		Subsidized Housing	<input type="text"/>

- The Evidence Dashboard displays. Click the + icon to the right of Residency evidence.

Dashboard ... ↺ ↻ ?


<p>Absence</p> <p>Absent Parent</p> <ul style="list-style-type: none"> - Absent Parent Child Support - Absenteeism <p>Adoption</p> <ul style="list-style-type: none"> - Adoption Payment <p>Alien</p> <ul style="list-style-type: none"> - Alien Sponsorship <p>Alien Sponsor</p>	<p>Family Cap Exemption</p> <p>Family Waiver</p> <p>Money Follows Person</p> <p>Extension</p> <p>FNS Authorized Representative</p> <p>Foster Care</p> <ul style="list-style-type: none"> - Foster Care Payment <p>Head of Household </p> <p>Household Meal Group </p>	<p>Permanent File</p> <p>Presumptive Eligibility</p> <p>Product Exclusion</p> <p>Residency   +</p> <p>Pregnancy</p> <ul style="list-style-type: none"> - Pregnancy Base Period Income - Unborn Child <p>Replacement / Manual Benefits</p> <p>Request CAP PACE LTC Emergency</p>
---	--	---

- The New Residency Evidence pop-up appears. Enter and select the applicable information then click **Save**.

New Residency Evidence



? x

* required field

Received Date * 

Household Member *

Residency Details

Start Date *  End Date 

Is applicant a resident of North Carolina? ☐

Has the applicant's intent to remain in the state been verified? ☐

Does applicant meet Special Assistance residency requirements? ☐

Comments

Note: Household Member, Living Arrangement and Residency are a few of the basic evidence required when adding a new client to an application. Additional evidence may be needed depending on the type of application. Refer to the *Minimum Mandatory Evidence Reference* job aid. When all necessary evidence has been added for the new client, users can resume processing the application.

8. Complete Verifications.
9. Apply Changes.
10. Check Eligibility.
11. Mark Ready for Determinations.
12. Approve Case.
13. Activate On Line.