



## Job Aid: Application to Case

LOG INTO NC FAST		
Login	Use your NCID and password to login to NC FAST.	<input type="checkbox"/>
INTAKE (For an Application)		
Search for Person	<p>Enter First name, Last Name, and Gender to search for a Person.</p> <p>Go to Clients and Outcomes tab, click on <b>Searches</b> shortcut, and <b>Person</b> hyperlink to access the Person Search.</p> <p><b>NOTE:</b> For additional information on Searching for a Person, please refer to the <i>Searching for Persons</i> procedure.</p> <p>If Person is not found, fully register Person using First Name, Last Name, Gender, and other applicable information.</p> <p><b>Note:</b> Please add SSN and mark primary on person page under evidence tab</p> <p>Ensure all clients on the Application are fully registered as Persons in NC FAST prior to starting the application.</p> <p><b>Note:</b> For additional information on Registering a Person, please refer to the <i>Registering Persons</i> job aid.</p>	<input type="checkbox"/>
Start Application	<p><b>Note:</b> If the Head of Household already has an existing integrated case, please 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.</p> <p><b>Note:</b> If beginning a MAGI application, please refer to the <i>Streamlined Application to Case &amp; Key Differences Checklist</i> job aid.</p> <p>To begin an application, go to the head of household's person page, click the applications tab, click the <b>New Application</b> hyperlink, and select the application checkboxes for desired programs.</p> <p>Complete the application by entering information <b>About The Claimant, Claimant's Home, Benefits, Income, Resources, Expenses</b> and review answers in the <b>Finish</b> section.</p>	<input type="checkbox"/>



<b>Submit Application</b>	<p>Once the worker gets to the last page of the application:</p> <ol style="list-style-type: none"><li>1. Click the “<b>Rights and Responsibilities</b>” hyperlink in the New Application pop-up (before you click the Submit button!) to access Rights and Responsibilities form. Print all 6 pages of <b>Rights and Responsibilities</b>, review the Rights and Responsibilities with applicant, and have client sign the signature page. (First 5 pages go to applicant; DSS keeps the signature page). If electronic signature is available, the Caseworker may use the technology.</li><li>2. 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.</li><li>3. If client asks for a copy of <b>Application PDF</b>, worker can print out the IEG. Otherwise, they should just print the signature page. To do so, after the application is submitted go to the Applications tab, click the <b>List Actions Menu</b> next to the submitted Application then select <b>View Application PDF</b> to print a copy of the Application PDF and Signature Page.</li></ol> <p><b>Note from DMA:</b> Remember that CCNC/CA enrollment information is not taken within the Medicaid application/IEG. Be sure to obtain this information so you can add it to the Managed Care evidence on the Evidence Dashboard prior to authorizing the application.</p> <p><b>Note from DSS:</b> 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>	<input type="checkbox"/>
<b>Match Client</b>	<p>Perform the manual Match Client process for any applicants not matched during the automated process</p> <p>Go to the Clients tab from the Income Support Application, click the <b>List Actions Menu</b> next to the client then select <b>Match Client</b> from the drop-down menu to begin the manual Match process.</p> <p><b>Note:</b> For additional information on matching a client, please refer to the <i>Match Client</i> job aid.</p> <p><b>Note:</b> If a Person Merge is required, please refer to the <i>Completing Person Merge</i> job aid.</p>	<input type="checkbox"/>
<b>Manage Evidence</b>  (Application Status = Submitted)	<p>Resolve issues with evidence, edit existing evidence, or add new evidence. Mandatory evidence types must be added in order to process the application. See the <i>NC FAST Mandatory Evidence and Verifications</i> job aid in order to process an application.</p> <p><u>Person Evidence:</u> Add a New or Existing ID Number - Go to the Person’s page and click the <b>Evidence</b> tab, and click the <b>New..</b> hyperlink. Click the <b>List Actions Menu</b> then select <b>Add</b>.</p> <p><u>Application Evidence:</u> Add New Evidence - Go to the application <b>Evidence</b> tab, click the <b>Page Actions Menu</b> then select <b>New Evidence</b> from the drop-down menu. Click the <b>List Actions Menu</b> then select <b>Add</b>.</p>	<input type="checkbox"/>



	<p><b>Note:</b> Adding/updating evidence must be completed even if all verifications have not been received.</p> <p><b>Note from DMA:</b> Remember that CCNC/CA enrollment information is not taken within the Medicaid application/IEG. It should be added within the Managed Care evidence on the Evidence Dashboard prior to authorizing the application.</p>	
<b>ELIGIBILITY (For an Application)</b>		
<b>Request Online Data</b>	<p>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>Click the <b>Online Data</b> tab then click the <b>Request Online</b> hyperlink.</p>	<input type="checkbox"/>
<b>Verify Evidence</b>	<p>Ensure all necessary verifications received are added onto the client's Application and Person pages.</p> <p><b>Person Verifications:</b></p> <ul style="list-style-type: none"><li>• Go to the Person page then click the <b>Evidence</b> tab</li><li>• Click the <b>List Actions Menu</b> next to the ID number</li><li>• Select <b>Add Proof</b> from the drop-down menu</li></ul> <p><b>Application Verifications:</b></p> <ul style="list-style-type: none"><li>• Click the <b>Evidence tab</b> (Evidence Dashboard)</li><li>• Click the <b>Verifications folder</b></li><li>• Click the <b>List Actions Menu</b> next to the item to verify</li><li>• Select <b>Add Proof</b> from the drop-down menu</li></ul> <p><b>Note:</b> Failure to enter mandatory verifications may result in an ineligible decision.</p>	<input type="checkbox"/>
<b>Check Eligibility</b>	<p>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"><li>• Click the <b>Eligibility Checks tab</b></li><li>• Click the <b>Check Eligibility</b> hyperlink then click box for program requested</li></ul>	<input type="checkbox"/>
<b>Apply Changes (Activate Evidence)</b>	<p>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"><li>• Click the <b>Evidence</b> tab (Evidence Dashboard)</li><li>• Click the <b>Page Actions Menu</b></li><li>• Select <b>Apply Changes</b> from the drop-down menu</li></ul> <p><b>Note:</b> All received verifications should be added. Apply Changes to evidence, even if all verifications have not been entered.</p>	<input type="checkbox"/>



<b>Mark Ready for Determination</b>	<p>After eligibility is checked, mark Ready for Determination.</p> <ul style="list-style-type: none"><li>• Click the <b>Tab Actions Menu</b></li><li>• Select <b>Ready for Determination</b> from the drop-down menu</li></ul>	<input type="checkbox"/>
<b>Review Eligibility Result &amp; Authorize</b>	<p>Authorize the case (if eligible), or Deny the case (if ineligible) <b>Note:</b> If denying an FNS Application for Missed Interview, refer to the <i>Denying a Program</i> procedure.</p> <ul style="list-style-type: none"><li>• Click the <b>Tab Actions Menu</b></li><li>• Select <b>Review Eligibility Result</b> from the drop-down menu</li><li>• Click the <b>List Actions Menu</b> next to the Product Delivery Case (PDC)</li><li>• Select <b>Authorize</b> or <b>Deny</b> from the drop-down menu.</li></ul>	<input type="checkbox"/>
<b>Activate Online</b>	<p>Activate the Product Delivery Case Online</p> <p>Go to the newly-approved PDC. Click on the <b>Tab Actions Menu</b> then select <b>Activate Online</b>.</p>	<input type="checkbox"/>
<b>OUTCOME</b>	Program Activated & Benefits Issued or Benefits Denied	