

# Uploading Documents into NC FAST

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## Overview

This job aid describes how:

- Caseworkers are able to upload documents for all case types within NC FAST.
- Counties need only the software to scan and save the document prior to uploading it to the NC FAST System, which in general, scanners already have preinstalled or bundled as part of the device purchase.
- There are no size limitations for files being attached and uploaded into NC FAST.
- Users are granted access according to the role attached to their NCID/NC FAST login. Only documents pertaining to an NC FAST case are to be uploaded.
- Any document transmitted **MUST** be pertinent to an active, case within NC FAST
- The primary areas of focus are the person/participant, integrated case, product delivery case, evidence/verification screens and the application.  
NOTE: For the purposes of the County interface, documents should be attached at the person level or the integrated case level.

## Step-by-Step Instructions

### Adding Attachments to the Person Page

1. Go to the NC FAST page. Click the **Clients and Outcomes** tab.
2. Click the Shortcuts panel **toggle**.
3. The Shortcuts menu expands. Click the **Searches** folder.
4. Click the **Person** hyperlink.
5. The Person Search page displays. Enter and select applicable search criteria, then click **Search**.
6. The Search Results display. Click the applicable **person** hyperlink.
7. The Person page displays. Click the **Client Contact** tab.
8. The Contacts page displays. Click the **Attachments** folder.

9. The Attachments page displays. Click the **New** hyperlink.
10. The New Attachment pop-up appears. Click the **Browse** hyperlink. Navigate to the folder where the document is saved on the computer.
11. When the file is located, **double click** on the file.
12. The Choose File to Upload pop-up closes and the file is now located in the File field in the pop-up.
13. Add additional file information as applicable, then click **Save**.

### **Adding Attachments to the Integrated Case**

1. Go to the NC FAST page. Click the **Clients and Outcomes** tab.
2. Click the Shortcuts panel **toggle**.
3. The Shortcuts menu expands. Click the **Searches** folder.
4. Click the **Person** hyperlink.
5. The Person Search page displays. Enter and select applicable search criteria, then click **Search**.
6. The Search Results displays. Click the applicable **person** hyperlink.
7. The Person page displays. Click the **Care and Protection** tab.
8. The Care and Protection page displays. Click the applicable **hyperlink** for the Integrated Case.
9. The Integrated Case displays. Click the **Case Details** tab.
10. The Case Details page displays. Click the **Attachments** folder.
11. The Attachments page displays. Click the **New** hyperlink.
12. The New Attachment pop-up appears. Navigate to the folder where the document is saved on the computer.
13. When the file is located, **double click** on the file.
14. The Choose File to Upload pop-up closes and the file is now located in the File field in the pop-up.
15. Add additional file information as applicable, then click **Save**.

## Viewing Attachments on the Person Page

1. Go to the NC FAST page. Click the **Clients and Outcomes** tab.
2. Click the Shortcuts panel **toggle**.
3. The Shortcuts menu expands. Click the **Searches** folder.
4. Click the **Person** hyperlink.
5. The Person Search page displays. Enter and select applicable search criteria, then click **Search**.
6. The Search Results displays. Click the applicable **person** hyperlink.
7. The Person page displays. Click the **Client Contact** tab.
8. The Contacts page displays. Click the **Attachments** folder.
9. The Attachments page displays, showing all the attached documents. Users can sort through each column by clicking on **Description**, **Date**, or **Status**.

## Viewing Attachments on the Integrated Case

1. Go to the NC FAST page. Click the **Clients and Outcomes** tab.
2. Click the Shortcuts panel **toggle**.
3. The Shortcuts menu expands. Click the **Searches** folder.
4. Click the **Person** hyperlink.
5. The Person Search page displays. Enter and select applicable search criteria, then click **Search**.
6. The Search Results displays. Click the applicable person hyperlink.
7. The Person page displays. Click the **Care and Protection** tab.
8. The Care and Protection page displays. Click the applicable **hyperlink** for the Integrated Case.
9. The Integrated Case displays. Click the **Case Details** tab.
10. The Case Details page displays. Click the **Attachments** folder.



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11. The Attachments page displays, showing all the attached documents. Users can sort through each column by clicking on **Description**, **Date**, or **Status**.

### **Cancel Attachment**

1. Go to the **Attachments** page.
2. Click the **List Actions Menu** for the intended attachment and select **Delete**.
3. The Attachment Status displays as Canceled.