

ePASS Document Upload

Last Updated: 05/06/2024

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Overview

This job aid describes how to accept, reject, or request additional information from a document for a specific verification sent by a client through ePASS.

Notes:

- The client's ePASS account must be linked to their NC FAST account to upload documents. Refer to the *ePASS-Linked Accounts and Change of Circumstance* job aid.
- This process gives clients the ability to view outstanding verifications from the Insurance Affordability Application Case or Integrated Case and upload files to support the evidence associated with the verification.
- When the client uploads and submits a document, it becomes viewable to the caseworker to verify.
- When the caseworker verifies and accepts the document, the applicable outstanding verification is automatically cleared.
- Caseworkers cannot deny an application when there are pending submitted documents.

Standalone Document Upload

- Linked ePASS users will now be able to upload documents via their enhanced ePASS account at any time to provide information to the local DSS Agency. The option to upload documents will no longer be contingent on an outstanding verification or recertification in progress. A new task has been developed to alert the caseworker when documents are submitted via this method which will appear on the Person Page of the applicant/beneficiary who has submitted the documents. The task is also sent to each caseworker of any Integrated Application Case or Integrated Case for the applicant/beneficiary who has submitted the documents. Individuals will now upload documents via ePASS to their linked account regardless of if they are opted in for eNotices or not.

Step-by-Step Instructions

1. From the Home page, click the **Inbox** tab.

NC FAST Eligibility Worker

Home Clients and Outcomes **Inbox** Calendar Reports

Home

2. The My Tasks page displays. Click **Assigned Tasks**.

My Tasks

My Open Tasks My Deferred Tasks **Assigned Tasks**

Open Tasks

3. The Assigned Tasks page displays. Select the applicable **Task ID** hyperlink.

NC FAST Eligibility Worker

Home Clients and Outcomes **Inbox** Calendar Reports

>> My Tasks Task Search X

My Tasks

My Open Tasks My Deferred Tasks **Assigned Tasks**

Assigned Tasks

Task ID	Subject	Priority
111199232	An update to receive to share nono-dential evidnce for Star Star	High

4. The selected task page displays. Click the **Submitted Documents** hyperlink.

NC FAST Eligibility Worker Enter Ref. Number or Keyword

Home Clients and Outcomes **Inbox** Calendar Reports

My Tasks Task 111199001 X

Task 111199001

Task 111199001

Status	Open	Worked on by	Deadline
Priority	High	Time Worked	Last Assigned
		00:00	

Verification documents submitted by Star Star on 11/5/2024 for Integrated Case 100155945.

Home History and Comments Assignments Graphical View

Home


Primary Action Supporting Information

Submitted Documents Participant Home Page

5. The applicable Home page of the Insurance Affordability Application, Income Support Application, or Integrated case displays. Click the **Evidence** tab.

Insurance Affordability Application (300704257) X

Insurance Affordability Application

 **Insurance Affordability Application**

Application Date 6/3/2036
Preferred Contact Not Recorded

Programs Insurance Affordability

37 years

Home All Documents Clients Programs Timers **Evidence** Eligibility Checks Related Cases Tasks

6. The Evidence page displays. Click the **Submitted Documents** folder.

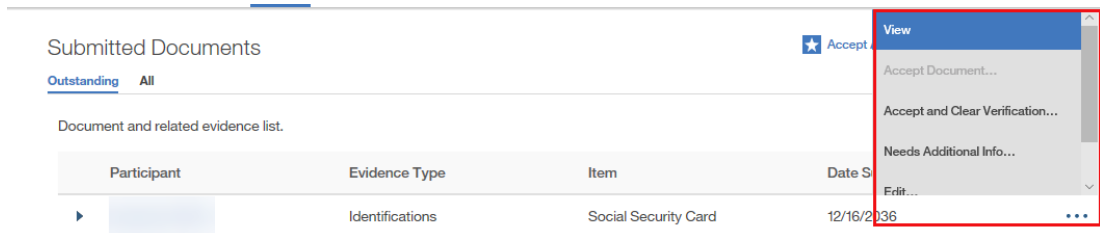
Evidence

Dashboard Verifications Issues Incoming Evidence Guided Change **Submitted Documents**

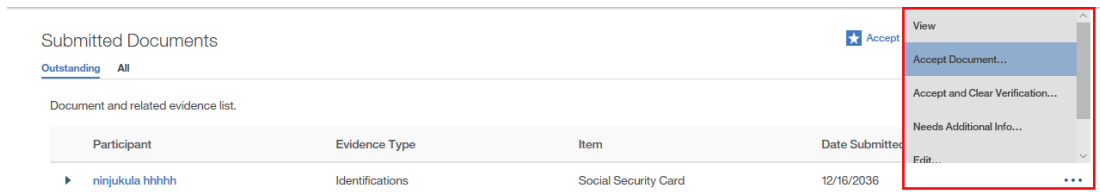
Evidence

Type	Client	Description
▶ Residency		Is a North Carolina resident.
▶ Addresses		Mailing address is [Redacted], North Carolina, 78523
▶ Tax Filing Status		Has a tax filing status of Non Filer
▶ Addresses		Private address is [Redacted] North Carolina, 78523

7. The Submitted Documents page displays a list of Outstanding verifications, or another document uploaded by the client. Click the **List Actions Menu** for the applicable evidence line item then select **View**.



8. The document displays. Review the document to make sure all required information is received before accepting or rejecting the submitted information. Close the document.
9. If the document satisfies verification requirements click the **List Actions Menu** then select **Accept Document**.



Notes:

- When the caseworker accepts the required level of documentation, the system automatically clears the verification.
 - Changes can be made to the document type (item) if it was entered incorrectly by the ePASS user by selecting **Edit** in the drop-down menu.
 - If the caseworker clears the verification manually from the verification list any associated document upload records in *Submitted* status change to *Accepted* status.
 - When the caseworker rejects the document, add notes to explain why the documentation was rejected. Notes are returned to ePASS and are viewable by the client.
 - If the document can be used but is incomplete, mark the document as missing information by selecting **Needs Additional Info** from the drop-down menu and adding notes to indicate what information is still needed.
 - On the Insurance Affordability application page caseworkers can view every document uploaded through ePASS by clicking the **Evidence** tab, selecting the **Submitted Document** folder, then clicking the **All** tab.
10. The Accept Document pop-up appears. Select the Item type from the drop-down. This is a required field. Then click **Accept**.

Note:

- If a caseworker selects Reject or Needs Additional Info the applicable pop-up will appear.
- Caseworkers must select the appropriate Item Type when accepting documents submitted through ePASS.
- The Item Type drop-down menu displays as a required field on both the Accept Document and the Accept and Clear Verification pop-ups on the Submitted Documents page.
- The default Item Type selection is *Uploaded from ePASS*. To accept the document, caseworkers are required to click the Item Type drop-down menu, then select the appropriate document type. If the selection is not changed from *Uploaded from ePASS*, caseworkers will encounter an error message when attempting to accept the document.
- The Item Type drop-down menu will not be added to the Needs Additional Information or Reject Document pop-ups.

Accept Document



* required field

Select the Item Type to accept this document.

Participant

Star Star

Item for Verification

Citizen Status

Item Type

Uploaded from ePASS



Accept

Cancel