

Energy – LIEAP Application to Case

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Overview

This job aid outlines the steps to complete a Head of Household's first Energy Assistance [Low Income Energy Assistance Program (LIEAP)] application in NC FAST. An Energy application is created when the Guided Interview is completed and submitted.

Criteria for Early LIEAP Only:

- Households with a person 60+ years old or
- Disabled and receiving Division of Aging and Adult Services (DAAS), and

- Active FNS/SNAP Case (Applicable to automated LIEAP only).

If this Head of Household:

- Is applying for the Crisis Intervention Program (CIP), follow the steps outlined in the *Energy - CIP Application to Case* job aid.
- Is applying for both CIP and LIEAP, refer to the *CIP & LIEAP Combined Application to Case* job aid.
- Has already applied in NC FAST for CIP, LIEAP, or both (*i.e.*, has an Energy Income Support case), refer to the *Subsequent Energy Assistance Applications* job aid.

When a pledged payment is included in a payment request, the application associated with the pledge payment can no longer be edited or reassessed. Refer to the *Energy Payment Requests and Check Recording Process* job aid.

Note: Energy Assistance programs (CIP and LIEAP) use a customized application (Guided Interview) that is separate from the Income Support applications used for other benefit programs in NC FAST (e.g., Food & Nutrition Services, Medicaid, Cash Assistance, Subsidized Child Care Assistance, etc.). Therefore, only Energy Assistance can be included in an Energy Assistance application.

Step-by-Step Instructions

Person Search and Registration

It is critical to perform a thorough, Person Search in NC FAST for everyone included in the application. This will help prevent duplicate person registrations and incorrect eligibility determinations.

1. Search NC FAST for each household member to see if they are already registered in NC FAST. Refer to the *Searching for Persons* job aid.
2. If any Household Member is not registered in NC FAST, register each before continuing the application process. Refer to the *Registering Persons* job aid.
3. Review each household member's Person page for accuracy and to determine whether they were previously registered. Update Person page information as necessary.

Notes:

- This step should occur before starting any Energy application; Person page updates will not transfer to an in-progress Energy application. Refer to the *Editing Person Information* and *Adding Addresses* job aids.
- Energy Applications and Cases are based on the Head of Household Private Address, where the client resides, and which indicates the location requiring heating or cooling. A Mailing Address is not required for Energy cases and will not transfer to the Energy Assistance application. If the Mailing Address exists on the Person page or the Energy Assistance Integrated Case, it will be printed on all Energy Assistance notices.
- If new address evidence needs to be added, end date an existing Private Address and add a new record. Do not delete any existing evidence on the Person page.
- No Energy user roles (a county staff person or Contractor who is assigned to either an Energy or Lumbee Energy user role) can make updates to addresses on the record of a registered person. These user roles are only able to add a Private Address record when completing an initial Person Registration in NC FAST. The Mailing Address and Private Address fields are editable in the Energy Application. The Energy Integrated Case will store these addresses for any subsequent applications and pull them into the Guided Interview.
- Keep the Head of Household's Person page open. This is where an Energy worker begins the Head of Household's initial Energy application.
- The latest information (Address, Phone Number, Date of Birth and Social Security Number) from Person Evidence will now be populated in application when an in-progress Energy application is resumed or while editing an already submitted application.

Search for Prior Energy Assistance Benefits

1. Perform an Energy Benefits Search to determine whether the Head of Household previously received Energy Assistance benefits in NC FAST.
2. From the NC FAST home page click the **Clients and Outcomes** tab then click the **toggle** to expand the Shortcuts panel.
3. The Shortcuts panel displays. Click the **Searches** folder.
4. The Searches folder expands. Click the **Energy Benefit** hyperlink.
5. Enter the Search Criteria for the Head of Household then click **Search**.

- The search results display. Click the **toggle** next to any result that says **Yes** in the Head of Household column. Information about Energy benefits received displays.

Energy Benefit Search X

Energy Benefit Search

Energy Benefit Search 🔄 🔍 ? * required field

! This benefit information may not be a true reflection on the household's available benefit. Please check the applications under the Applications tab for this household to confirm actual benefits available.

Search Criteria

Reference

Additional Search Criteria

First Name Date of Birth

Last Name Gender

Search Results: NC FAST

Person	Case Reference	Last Application Date	Head of Household	Address	Gender	Date of Birth
<input type="checkbox"/>		9/5/2017	Yes		Female	12/21/1960
<input type="checkbox"/>					Female	1/29/1965

Notes:

- If the Head of Household column contains **Yes**, determine the type (and amount) of Energy assistance already received. If the Head of Household column reads **Yes** and the client is still eligible for LIEAP benefits (whether in the current fiscal year or not), follow the guidance outlined in the *Subsequent Energy Assistance Applications* job aid (do not use the steps outlined in this *LIEAP Application to Case* job aid).
- If the Head of Household column contains **No**, continue to step 5 below.
- To examine an existing Energy Income Support case in detail, click the **Case Reference** number. The Energy Income Support case is displayed in a new tab. An Energy worker should begin any subsequent Energy Assistance application (whether for CIP or LIEAP) from this page, not from the Head of Household's Person page.
- This message will display after the search criteria is entered: This benefit information may not be a true reflection on the household's available benefit. Please check the applications under the Applications tab for the household to confirm actual benefits available.

Initial LIEAP Application

- Navigate to the Head of Household's Person page. Click the **Applications** tab.
- The Applications page displays. Click the **New Application** hyperlink.

3. The New Application pop-up appears. Select the **Low Income Energy Assistance Program (LIEAP)** check box then click **Next**.

Note: Depending on the NC FAST user role, there may be an option to select the **Energy** radio button then clicking **Next**. On the next page, select the Low-Income Energy Assistance Program (LIEAP) check box.

4. The Guided Interview wizard opens (on the About the Claimant page). The Guided Interview is divided into several sections. Enter or select the applicable information on each page.

Notes:

- An asterisk (*) indicates mandatory information. Some mandatory information (like Race and Ethnicity) may not always be marked with an asterisk. After entering or selecting all mandatory information on a Guided Interview page, click **Next** to progress to the next page.
- If an Energy worker does not enter or select an answer to a mandatory question, clicking **Next** generates a validation message that lists the information that must be supplied to progress further. Enter or select answers to those questions then click **Next**.
- When the application progresses successfully to the next page, NC FAST automatically saves all information entered on the previous page. The Energy worker can select **Close** (at bottom left) at any time to end the Guided Interview. The next page allows the worker to choose whether to save the application and continue it later (In-Progress status) or quit/delete it.

About the Claimant

1. Enter or select the applicable information then click **Next**.

Information About The Claimant

Application Details

Method of Receipt: *

--Please Select--

Application Date: *

Date of Interview *

Close

Next

Notes:

- The question, *Does this person have an SSN?* is a required field.
- Select **Yes** if the Head of Household has an SSN. The Head of Household's SSN then appears in the field below (if SSN evidence was to the Head of Household's Person page).
- Select **No** if the Head of Household (an ineligible alien, for example) does not have an SSN. Select **N/A** for the *Has the claimant applied for an SSN?* question that appears. Answering Yes to *Is this person disabled?* will trigger NC FAST to apply the \$85 Medical Deduction (if SSI is chosen as the client's Benefit income type later in the Guided Interview).
- Selecting **Yes** in response to the question: *Has the claimant lived at this address for 12 months or longer?* triggers NC FAST to ask questions later about all the household's Energy providers.
- If someone other than the Head of Household or a Household Member is applying for Energy Assistance on behalf of the household, select **Yes** for *Is someone other than a household member applying for the household?* then enter the representative's first and last names in the fields that appear.
- The Date of Interview field has been added for combined CIP & LIEAP applications.

The Claimant's Home Section

1. Select the **Energy Provider** from the Provider Name drop-down menu.

Energy Provider Search

About The Claimant

The Claimant's Home

Household Details

Summary

Eligibility Results

your home

Energy Provider Search

Please identify the household's energy providers.

Print

Select Energy Provider

The following is the result of your search. If you do not see the vendor you are looking for, please go back and rerun the search.

Provider Name *

×

▼

Close

Back

Next

Notes:

- All fields are mandatory on the Energy Provider Search page.
- When the Energy worker enters a minimum of two consecutive characters found in an Energy provider's name (in the Energy Provider Name text field), any enrolled provider with those consecutive letters in its name appear in the search results. For example, entering "as" for the Energy Provider Name will return all results that include both gas and Washington in the provider's name.
- If an Energy provider does not appear in the search results, contact a supervisor, or lead worker for guidance. They enter and submit all county Energy providers with contracts to state-level personnel who approve or reject them. If a provider's status is not Enrolled (which means approved), that provider will not appear in search results.
- On the Select Energy Provider screen, a provider must be selected.
- Housing Status is mandatory for the application to be submitted. Select an applicable option from the drop-down menu.

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Claimant Details

Has the claimant been emancipated through a court order? --Please Select--

Housing Status: (select one) * --Please Select--

Voter Registration

If you are not registered to vote where you live now, would you like to apply to register to vote here today? IF YOU DO NOT ANSWER THE QUESTION, YOU WILL NOT BE ELIGIBLE TO VOTE.

Close Back Next

Household Details Section

1. Enter or select information about the Household.

Household Details

The Claimant's Home

Household Details Help

* Indicates a required item

Does any one in the claimant's home have any income ? * --Please Select--

Does any one in the claimant's home have any expenses ? * --Please Select--

Does any one in the claimant's home have any resources ? * --Please Select--

Close Back Next

2. When Yes is a response to the items listed above Select the applicable radio button beneath question.

Notes:

- Add income, expenses, and resources for all household members. LIEAP requires current month amounts for these.
- NC FAST classifies some sources of income as Benefit Income instead of as Unearned Income. For example, SSI is Benefit Income, not Unearned Income.

Summary Section

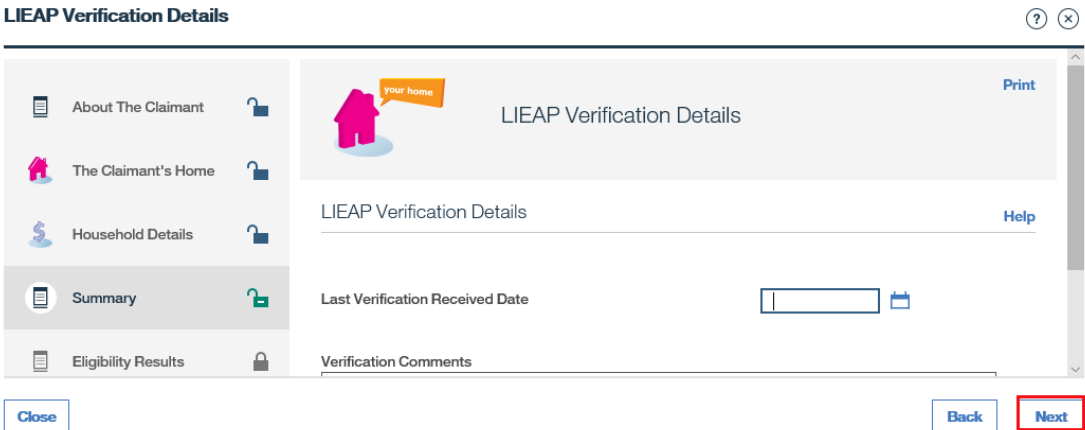
1. The *Review the Claimant's Answers* page summarizes all information entered on the Guided Interview. Review this page thoroughly.

- a. Edit, delete, or add information as necessary on this page.
- b. After confirming that all information is accurate, click **Next**.

LIEAP Verification Details Section

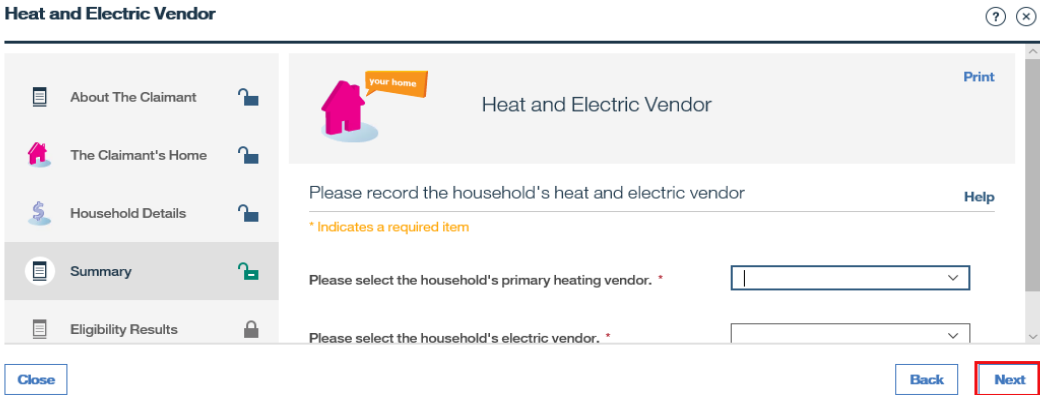
1. Enter the last verification received date and comments then click **Next**.

Note: The application cannot be authorized if the last verification received date is not entered.



Heat and Electric Vendor Section

1. Select the household's **primary heat vendor** from the drop-down menu.
2. Select the household's **electric vendor** from the drop-down menu then click **Next**.



Note:

- An authorized rep will be assigned to an application only if the Energy Provider is not registered with FIS.

Home - CHATHAM

Home Financial Credentials Relationships Contact Alternative ID

Home

Enrollment Date	9/29/2023	End Date	
Preferred Language	English	Preferred Communication	Mail/Post
Service County	Chatham	Primary Category	Energy Vendor [View Types]

Payment Details

Location ID		Direct Deposit Status	
Currency	US Dollar	Authorized Rep Provider	Yes

- Yes, will be displayed on the Energy Provider screen for Authorized Rep Provider
- The system will recognize that the provider is not registered and will link it to the DSS County Office as the Authorized Rep.
- The approval notice will only display the non-registered provider and not the DSS County Office as the provider on the notice.

Eligibility Results Section

1. Review all information to make certain the eligibility determination matches expectations. Click **Next**.

Rights and Responsibilities Section

1. Select each **check box** then click **Submit**.

Note: If needed, Energy workers can open the Client Rights and Responsibilities document (in English or Spanish) and print it using the hyperlinks on this page. Each one opens in another window as a PDF document. Closing the PDF returns the Energy worker to the Guided Interview's Rights and Responsibilities page.

2. The Application tab on the Head of Household's Person page displays. Click the **reference number** hyperlink for this application.

Note: The application Status must be *Submitted* for the Reference Number to become a hyperlink. Click the **refresh** icon to update the application Status to *Submitted*.

3. The Energy Application Home page displays. Click the **Clients** tab to confirm that NC FAST has matched all household member information entered on the Energy application with information (name, SSN, date of birth) that appears on each household member's Person page:

- a. A list of household members included on this application displays. A status of *No* in the Registered column indicates that the person's name, date of birth, and/or SSN as entered on the application does not match these same details on their Person page.
- b. For each household member with *No* in this column, click the **List Actions Menu** then select **Match Client**. Refer to the *Match Client* job aid for details.
- c. After successfully completing the Match Client process, *Yes* should now appear in the Registered column for every household member.

Note: NC FAST automatically matches name, SSN, and date of birth (Status = *Yes*) if what is entered on an application matches this same information on the Person page.

Verify Evidence with OVS or FNS & Work First

1. Click the **Online Data** tab to check multiple online databases that might verify evidence included on the application. Refer to the *Requesting and Viewing Online Data OVS* job aid. Make a note of any OVS results that do not match the details recorded during the Guided Interview.
2. Click the **FNS & Work First** folder to view any income, resources, and/or expenses used to determine a household member's eligibility for active Food & Nutrition Services (FNS) or Work First/Cash Assistance cases. Note any details that affect the household's Energy Assistance application.
3. If either OVS results or information found on the FNS & Work First folder indicate that an evidence or verification source needs to be edited/updated on the Guided Interview:
 - a. Click the **Tab Actions Menu** then select **Edit Application Information**.
 - b. The Summary page of the Guided Interview pop-up appears. Select **Edit**, **Delete**, or **Add** (if available) to any section of the Summary page to change information recorded on the Guided Interview.

Note: Selecting Delete removes the information from the application immediately. Selecting Edit or Add, on the other hand, opens the relevant page of the Guided Interview. When the page displays:

- i. Update information as necessary.
- ii. Change the verification method, if necessary.
- iii. Click **Next** to return to the Summary page.
- iv. Repeat steps 17-19biii as often as necessary to record OVS results.

- v. Click **Next**.

Check Eligibility and Authorize or Deny the Application

1. The Eligibility Results page displays. Review eligibility results then click **Next** if satisfied with the results.

Note: Clicking **Back** returns to the Summary page.

2. The Update Application pop-up appears. Click **Confirm** for NC FAST to use the changes you made on the Guided Interview to reassess eligibility.
3. Click **Cancel** to return to the Summary page.
4. The Energy Application page displays. Authorize or Deny the application.
5. To authorize the application, click the **Tab Actions Menu** then select **Authorize Program**.

Note: If Authorize Program is greyed out, click the to the **Programs** tab, and check the ineligible decision.

6. The Authorize Program pop-up appears. Select the applicable **check box** then click **Authorize**.
7. To deny the application click the **Contacts** tab to add case notes to substantiate denying the application.
Note: Case notes can only be added to an Energy application before the application is disposed.
8. Click the **Notes** folder then select the **New Note** hyperlink.
9. Enter a Subject and your notes. Click **Save**.
10. Click the **Programs** tab.
11. Click the **List Actions Menu** then select **Deny**.
12. The Deny Program Request pop-up appears. Select the **Denial Reason** from the drop-down menu, add **comments**, then click **Save**.
Note: The denial reason "Eligible but there are not funds available," is now available in the drop-down menu when the applicant is eligible but, there are no funds available.
13. Print the approval or denial notice:

Note: The Energy Programs Action Notice is sent through Central Print for LIEAP One Time Supplement payments. The manual option is available for county workers to

print, if needed. For example, if an Energy Programs Action Notice is returned to the local DSS agency by the postal service, workers can print a notice and send it to the client's new address.

- a. Click the **Contacts** tab then click the **List Actions Menu** associated with the notice.

Note: The approval/denial notice is also accessible on the Head of Household's Person page (Contact tab → Communication folder).

- b. Select **View/Print**. The approval or denial notice opens as a PDF file.

Note: Depending on the web browser used, the notice may open automatically in a new browser tab, or it may download (in which case it must be opened manually).

- c. Check the notice for accuracy. Print then close the PDF file.

14. The Contacts page on the Energy Application displays. To update the notice's status from *Draft* to *Sent*:

- a. Click the **List Actions Menu** then select **Edit**.
- b. Click the drop-down menu for **Status** then select **Sent**.
- c. Click **Save**.

15. View the Pledged Payment Status:

- a. Navigate to the Energy Application page. Click the **Programs** tab.
- b. Click the **toggle** next to the Program to review details.

16. Add case notes. Click the **Related Cases** tab.

- a. Click the **reference number** hyperlink.
- b. The Energy Income Support Case displays. Click the **Case Details** tab.
- c. The Notes page displays. Click **New**.

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

18. The Energy Income Support page displays.