

# Energy – Subsequent Application Process

Last Updated: 09/20/2023

Last Reviewed: 09/20/2023

## Table of Contents:

Overview .....	1
Step-by-Step Instructions.....	2
Determining Subsequent Application Process .....	2
Energy Benefit Search .....	5
Add Energy Application.....	6
Adding/Editing Applicable Information .....	7
Verifications .....	10
Authorize, Deny, or Withdraw .....	15

## Overview

This job aid describes the steps to complete a subsequent Energy Assistance application. Use this process whenever a household which includes the same members applies again for Energy Assistance.

The subsequent Energy application process involves adding an application to the household's existing Energy Income Support case. NC FAST then pulls information from the household's last Energy application into this added ("short") application. The worker then updates relevant information on the short application. The *Energy – Application Process Decision Tool* in FAST Help contains detailed guidance on how to determine which application process to use to key an Energy application.

**Note:** NC FAST will not allow a user to add or remove household members during the subsequent Energy Assistance application process.

Any subsequent Energy Assistance application can include CIP, LIEAP, or both CIP and LIEAP no matter what Energy program(s) that exact same household last applied for. All previous Energy Assistance applications associated with household members must be disposed of. In addition, NC FAST will determine the household ineligible if:

- The household has already received LIEAP benefits in the current fiscal year.
- The application would cause the household to exceed the maximum allowable CIP benefits for the fiscal year.

The subsequent Energy application process greatly reduces:

- The amount of time required to key an Energy application.
- The number of Energy Income Support cases in NC FAST.

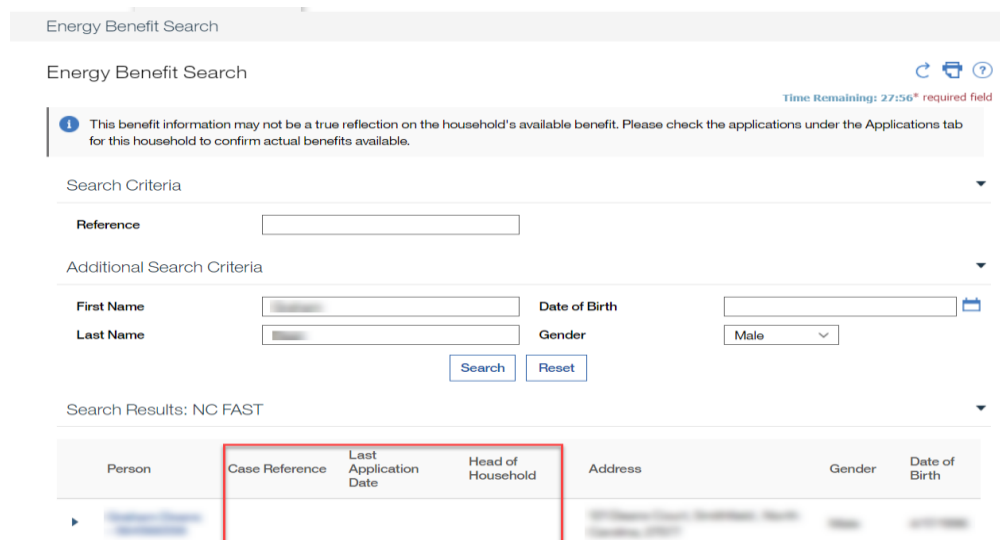
## Step-by-Step Instructions

### Determining Subsequent Application Process

1. Complete the steps in the *Energy – Application Process Decision Tool* job aid to determine which of the two Energy Assistance application processes to use to key the household's application.

**Notes:** While completing these steps, do not close Any Energy Benefit Search page that includes a search result for a current household member who received Energy Assistance as head of household (i.e., “Yes” appears in the Head of Household column) if the search result includes either:

- A hyperlinked case reference number for an Energy Income Support case that includes the same household members as the one currently applying.
- A Last Application Date in the current fiscal year.



Energy Benefit Search

Energy Benefit Search

Time Remaining: 27:56\* required field

**i** 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
<a href="#">[Link]</a>						

- Energy Applications associated with an Energy Income Support case reference number listed in the search results described above.
2. After determining to follow the subsequent application process step 9.a of the *Energy – Application Process Decision Tool* job aid, complete the following:
- a. Click the **Energy Benefit Search** tab.
    - i. The Energy Benefit Search page displays. Click the **toggle** associated with the search result for this head of household.
    - ii. Current Fiscal Year Energy Benefits Received for this person display.

**Notes:** The following informational message appears at the top of the Energy Benefit Search page when search results display: “This benefit information may not be a true reflection on the household’s available benefit. Please check the applications under the Application tab for this household to confirm actual benefits available.” This means that the amount listed in the Potential Remaining Balance column of a toggled search result may not be accurate. The message advises the Energy worker to perform the steps listed in 2.b-d below:

- To tally CIP benefits received during the current fiscal year.
- To note whether anyone in the household received LIEAP benefits in the current fiscal year.

NC FAST Eligibility Worker Enter Ref. Number or Keyword Welcome NCFast USER57916 (26:11)

Home Clients and Outcomes Inbox Calendar Reports

Energy Benefit Search X

Energy Benefit Search

Time Remaining: 26:11 \* required field

**1** 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 KIRA Date of Birth 1/1/1980

Last Name CARBAJAL Gender Female

Search Reset

Search Results: NC FAST

Person	Case Reference	Last Application Date	Head of Household	Address	Gender	Date of Birth
<a href="#">KIRA B CARBAJAL</a>	987654321	2/3/2020	Yes	123 N MAIN ST, BENSON, Johnston, North Carolina 27504	Female	1/1/1980

Current Fiscal Year Energy Benefits Received

Benefit Type	Benefit Received	Potential Remaining Balance
LIEAP	300.00	0.00
Federal CIP	89.52	510.48

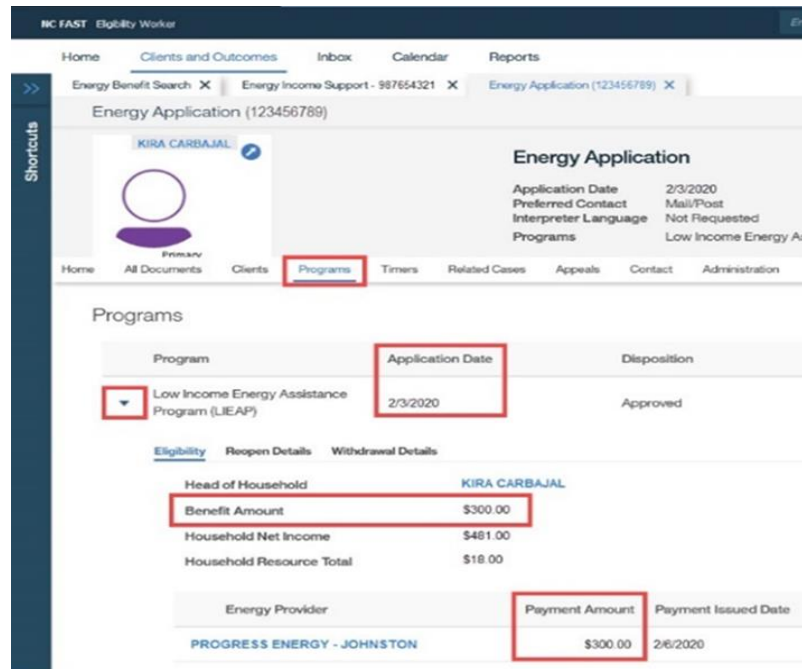
- b. Navigate to the head of household's Person page. On the Energy Benefit Search page, click the **head of household's name** hyperlink in the search result.

Search Results: NC FAST

Person	Case Reference
<a href="#">KIRA B CARBAJAL</a>	987654321

- c. The Person page displays. Return to a relevant Energy Application on which a current household member is listed as head of household to tally the current fiscal year's CIP benefits the household has received. In addition, note whether the household has received LIEAP benefits in the current fiscal year. To find this information:
- On step 9 of the Decision Tool ("The Clients page of the Energy Application displays"), after comparing the clients listed to the composition of the household currently applying for Energy Assistance, click the **Programs** tab.

- ii. The Program page displays. Click the toggle associated with an Energy program that is listed (either CIP or LIEAP) in the current fiscal year.
- iii. Eligibility results display. Both the benefit amount and the application date are listed.



NC FAST Eligibility Worker

Home Clients and Outcomes Inbox Calendar Reports

Energy Benefit Search X Energy Income Support - 987654321 X Energy Application (123456789) X

Energy Application (123456789)

KIRA CARBAJAL

Primary

Home All Documents Clients **Programs** Timers Related Cases Appeals Contact Administration

Energy Application

Application Date 2/3/2020  
Preferred Contact Mail/Post  
Interpreter Language Not Requested  
Programs Low Income Energy As

Programs

Program	Application Date	Disposition
Low Income Energy Assistance Program (LIEAP)	2/3/2020	Approved

Eligibility Reopen Details Withdrawal Details

Head of Household KIRA CARBAJAL

Benefit Amount	\$300.00
Household Net Income	\$481.00
Household Resource Total	\$18.00

Energy Provider	Payment Amount	Payment Issued Date
PROGRESS ENERGY - JOHNSTON	\$300.00	2/6/2020

- d. If applicable:
  - i. Repeat steps 2.b.ii-iii for the other Energy program listed on the Program page.
  - ii. Repeat steps 2.c.i-iv for each adult household member listed as head of household in Energy Benefit Search results, when warranted.
  - iii. Click **X** to close each Energy Application tab.
  - iv. Click **X** to close any Energy Benefit Search page that doesn't include the most recent application from the household.

## Energy Benefit Search

1. The Energy Benefit Search page which includes search results for the same household's most recent application displays. Click the **Case Reference number** hyperlink to open the Energy Income Support case.
2. The Energy Income Support case displays. Click the head of household's **name** in the Context Panel to access her/his Person page.

3. The head of household's Person page displays. Edit information on the page (e.g., marital status) and/or manage evidence (e.g., address), as warranted, to ensure that the information is both accurate and current. When done, click **X** to close the Person page tab.

**Notes:**

- Consult the following job aids for guidance: Adding Address Wizard, Editing Person Information, Editing Addresses, and Adding/Editing the Social Security Number (SSN).
- Only Eligibility-level users can change the client's address and add/edit the SSN on a Person page. Energy and Lumbee Energy user roles cannot. They can, however, edit Private Address and Mailing Address fields on an Energy application. NC FAST then stores these updates in the Energy Income Support case. The next subsequent application will pull them into the Guided Interview.

## Add Energy Application

1. The Energy Income Support case displays. Repeat steps 4-5 above for each household member. Click the **Tab Actions Menu** on the Energy Support case then select **Add Energy Application**.



2. The New Application pop-up appears. Select the check box(es) associated with the applicable Energy Assistance program(s) then click **Next**.
3. The Review the Claimant's Answers page displays on the Summary section of the Guided Interview. It is pre-populated with relevant information from the most recent application and the current Person page information for all household members. Review, edit, add, and/or delete information, as needed.
  - Drag the **scroll bar** to the top of the Review the Claimant's Answers page, if necessary.
  - Complete steps 8.a-e below, when applicable. At the end of each step, click **Next** to return to the Summary section of the Guided Interview.
  - a. If no primary phone number appears under Contact Details:

- i. Close the application and delete it.
- ii. Navigate to the head of household's Person page.
- iii. Add new Phone Number evidence to type Personal. Refer to the *Adding Addresses* job aid for guidance.
- iv. Navigate to the Energy Income Support case. Click the **Tab Actions Menu** then select **Add Energy Application**.

## Adding/Editing Applicable Information

1. Edit the **Date of Application** and the **Date the claimant** signed the application or DMA-5001. If these are not changed, the application date will display incorrectly on the application PDF.

**Note:** This date cannot be changed once the application is submitted.

**Review The Claimant's Answers** (?) (X)

---

- About The Claimant
- The Claimant's Home
- Household Details
- Summary**
- Eligibility Results

### Review The Claimant's Answers

Here is a full summary of what the claimant has told us about the claimant and the claimant's home so far.

Print

**Application Details** ▼

Date of Application:	Received Method:	Action
	In-Person	<span style="border: 1px solid red; padding: 2px;">Edit</span>

**Authorization Details** ▼

Authorization Date:	Action
1/1/2019	<span style="border: 1px solid red; padding: 2px;">Edit</span>

**Name** ▼

Close

Back
Next

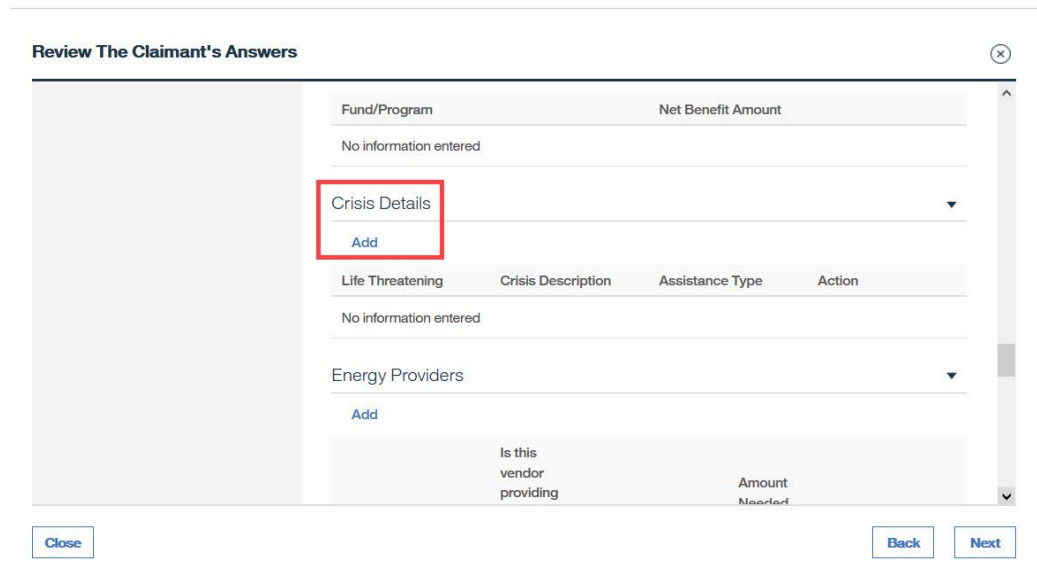
2. Edit the Private Address and/or Mailing Address, if incorrect.

### Notes:

- Eligibility workers, lead workers, and supervisors can add and edit address records on the Person page, but Energy and Lumbee Energy user roles cannot. They must instead update addresses on the Energy application (before submitting the application).

- Housing Status is mandatory for the application to be submitted. Select the applicable option from the drop down menu.

a. Add Crisis Details.



**Review The Claimant's Answers**

Fund/Program	Net Benefit Amount
No information entered	

**Crisis Details** ▼

[Add](#)

Life Threatening	Crisis Description	Assistance Type	Action
No information entered			

**Energy Providers** ▼

[Add](#)

Is this vendor providing	Amount Needed

[Close](#) [Back](#) [Next](#)

b. Add the Energy provider(s).

**Note:** If the application includes CIP and the heating source for the crisis is anything other than an electric provider, users must enter both an electric and non-electric heating provider. If the client does not request assistance for the electric provider, enter a \$0 crisis amount for the electric provider and select *No emergency* as the status of this energy source/account. Add the non-electric heating provider and include the actual status of the account and the actual crisis amount.

**Example:** Client is a Duke Energy customer but only needs assistance with LP gas at AmeriGas. The worker will add both Energy providers to the application. For AmeriGas, the user will select the actual status of the account and enter the actual amount needed to alleviate the crisis. For Duke Energy, the user will select *No emergency* as the status of the account and enter 0 [zero] as the crisis



amount).

**Review The Claimant's Answers**

Energy Providers

Add

Provider Name	Is this vendor providing the household's primary heating source?	Account Number	Source Status	Amount Needed to Alleviate Crisis	Pre-Paid Metering	Action
No information entered						

Household Electric Vendor

Close Back Next

c. Add Income, Resource, and/or Expense details:

- Click the **name** drop-down then select the name of the application household member.
- Click **Add**.

**Note:** Repeat step c.-ciii as often as is necessary to include each household member's income, resources, and expenses on the application.

Income Details

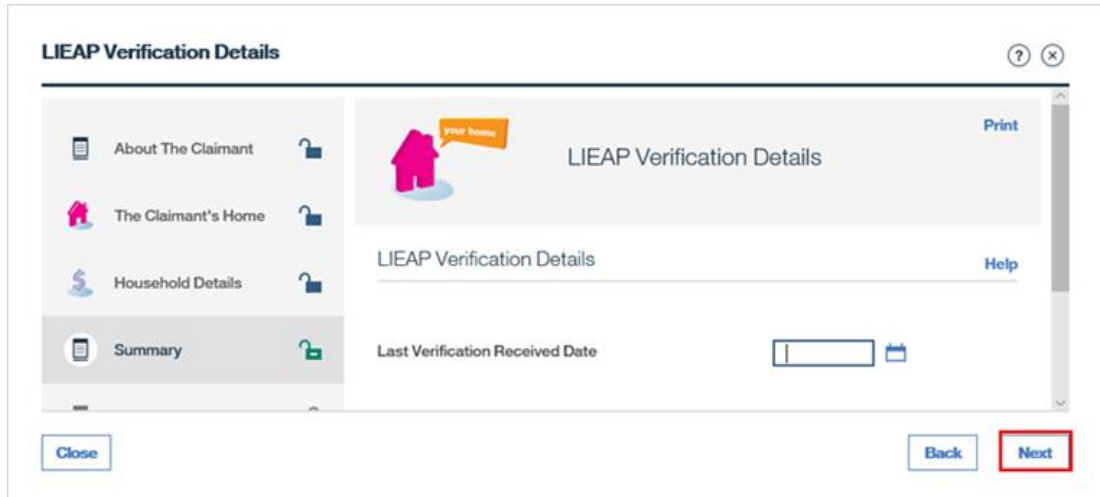
Graham Add +

First Name	Type	Current Month Amount	Prior Month Amount	Verification Item	Action
No information entered					

Expense Details

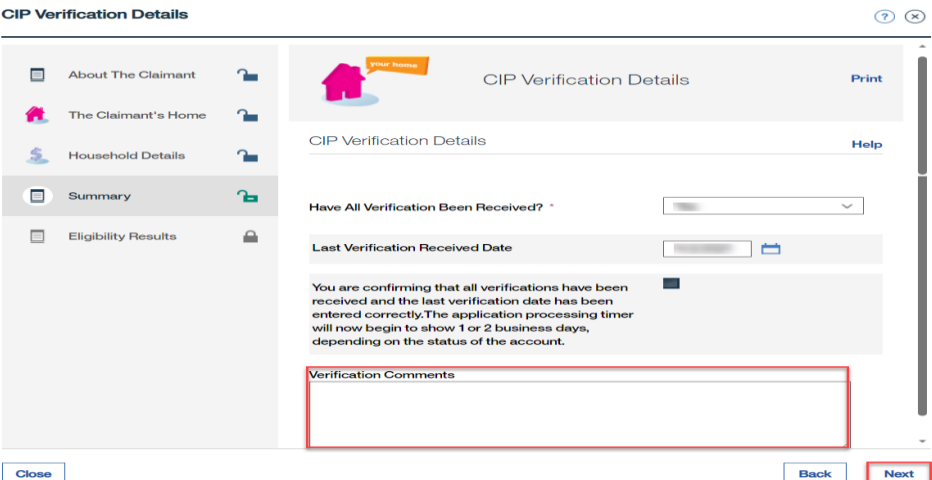
Back Next

- After the review process is complete, click **Next**.
- Enter the LIEAP Verification Details then click **Next**.

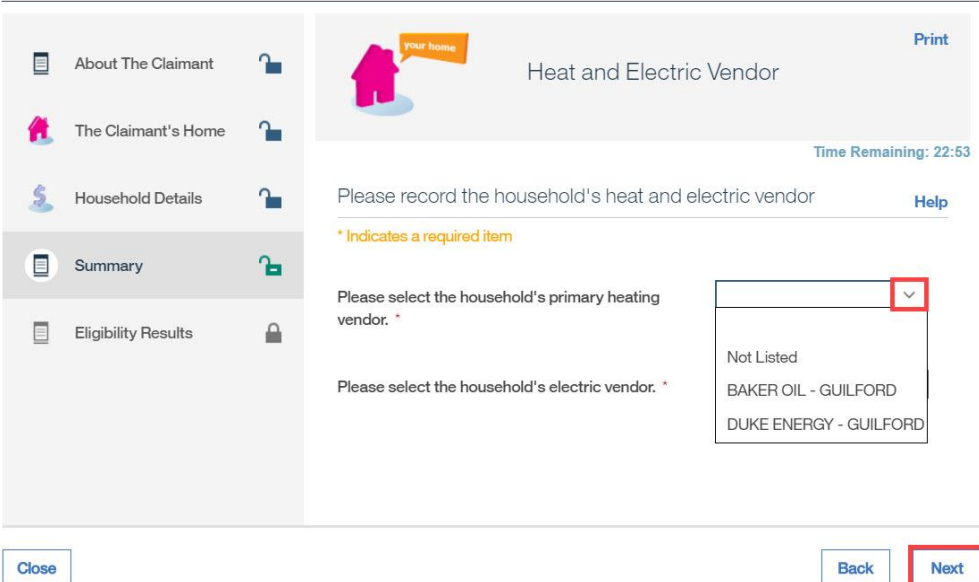


## Verifications

1. CIP Verification Details: Click the **Have All Verification Been Received** drop-down menu then select the applicable option.
  - a. Select **No** when all verifications have not been received. Enter necessary **Verification Comments** then Click **Next**.
  - b. Select **Yes** When all verifications have been received.
    - i. Enter the Last Verification Received Date.
    - ii. Select the “You are confirming that all verifications have been received and the last verification date has been entered correctly. The application timer will now begin to show 1 or 2 business days, depending on the status of the account.” Check box.
    - iii. Enter any necessary **Verification Comments** then click **Next**.



2. The Heat and Electric Vendor page of the Summary displays. Click the **Please select the household's primary heating vendor** drop-down menu then select the applicable vendor.
  - a. Click the **Please select the household's electric vendor** drop-down menu then select the applicable vendor. Click **Next**.



3. The Eligibility Results page displays. Scroll to review results to make certain they match eligibility expectations then click **Next**.

4. The Rights and Responsibilities page displays. Select each **check box** to confirm the claimant has completed the associated action then click **Submit**.
5. The Energy Income Support page displays. Click the **Case Details** tab.
  - a. The Notes page displays. Click the **Applications** folder.
  - b. The Applications page displays. Click the **Reference number** hyperlink associated with the submitted application.

**Note:** If the application is in *Submitting* status, click the **Refresh** icon until the status changes to *Submitted*.

6. The Energy Application displays on the Home page. Click the **Clients** tab to confirm that NC FAST has matched all household member information on the Energy application with the same information (name, SSN, date of birth) that appears on each household member's Person page.
7. A list of household members included on this application displays. Yes, should appear in the Registered column if all household members were registered on the most recent application.
8. Click the **Online Data** page 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 for guidance.

**Note:** Make a note of any OVS results that do not match the details recorded during the Guided Interview. This will allow the user to quickly update the associated evidence on the Energy application later.

9. Click the **FNS & Work First** tab to view any income, resources, and/or expenses used to determine a household member's eligibility for any active Food & Nutrition Services (FNS) or Work First/Cash Assistance cases.
10. If either OVS results or information found on the FNS & Work First tab indicate that evidence or verification source needs to be edited/updated on the Guided Interview:

11. Click the **Tab Actions Menu** then select **Edit Application Information**.

12. The Review the Claimant's Answers page of the Guided Interview pop-up appears. Select *Edit*, *Delete*, or *Add* (if available) for any section of the Summary page to change information recorded earlier on the Guided Interview.

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

- a. Update information as necessary
- b. Change the verification method, if necessary.
- c. Select **Yes** When all verifications have been received.
- d. Enter the **Last Verification Received Date**.
  - i. Select the “You are confirming that all verifications have been received and the last verification date has been entered correctly. The application timer will now begin to show 1 or 2 business days, depending on the status of the account.” Check box.

**Note:** Add any additional required verification comments. Do not delete any previous comments.

- e. Click **Next** to return to the Summary page.
- f. Repeat steps 17.b-f as often as necessary.
- g. Click **Next**.
- h. The Eligibility Results page displays. Review eligibility results to ensure they match expected eligibility. Click **Next** when satisfied with the results.

**Note:** To add, edit, or delete additional information, click Back to return to the Summary page.

- i. The Update Application pop-up appears. Click Confirm to apply the changes made on the Energy application.

**Note:** Click Back to return to the Summary page (to continue updating the Energy application).

13. The Energy Application page displays. Print the application for the client to sign.

- a. Click the **Contact** tab.
- b. The Contact page displays. Click the **Attachments** folder.
- c. The Attachments page displays. Click the **toggle** associated with the correct Application PDF.

**Note:** The list likely includes more than one Application PDF. If in doubt as to which PDF is the most recent, click the **toggle** associated with each Application PDF to compare the day/times in the Name hyperlink.

Energy Application (987654321)

Home All Documents Clients Programs Timers Related Cases Appeals **Contact**

Notes

**Attachments**

Communications

### Attachments

Description
<div> <div>▼</div> <div>Application PDF</div> </div> <div> <div>Name</div> <div>03/25/2020 11:09:33_Application.pdf</div> </div> <div> <div>Location</div> <div></div> </div> <div> <div>Category</div> <div></div> </div> <div> <div>Sub-Category</div> <div></div> </div>
<div> <div>▼</div> <div>Application PDF</div> </div> <div> <div>Name</div> <div>03/25/2020 11:49:38_Application.pdf</div> </div> <div> <div>Location</div> <div></div> </div> <div> <div>Category</div> <div></div> </div> <div> <div>Sub-Category</div> <div></div> </div>

- d. Click the **PDF file hyperlink** in the Name field to open or to download the file.

**Note:** Depending on the web browser used, the Application PDF may open automatically in a new browser tab or it may download (in which case the user must open it manually).

- e. A PDF version of the application displays. Print it for client signature (or capture the client's signature on a signature pad, when possible, before printing).

**Note:** The client's signature on the Application PDF signature page is required to make the application official.

- f. Copy the Application PDF signature page and give the client a copy as proof that s/he completed an Energy application.

- g. Click **X** to close the Application PDF. The Attachment page displays. Add case notes as needed.

**Note:** NC FAST prevents a user from adding case notes to the application after it is disposed.

- h. Click the **Notes** folder.
- i. The Notes page displays. Click the **New** hyperlink.
- j. The New Note pop-up appears. Enter and select information then click **Save**.

## **Authorize, Deny, or Withdraw the Application**

1. Authorize, deny, or withdraw the application.

**Note:** The application cannot be authorized unless the last verification date is entered. A validation message will display “Last Verification Received Date must be entered before authorizing the CIP program.”

- a. To authorize the application:
    - i. Click the **Tab Actions Menu** then select **Authorize Program**.
    - ii. The Authorize Program pop-up appears. Select the applicable **check box** then click **Authorize**.
  - b. To deny the application:
    - i. Click the **Contact** tab.
    - ii. The Notes page displays. Click **New**.
    - iii. The New Note pop-up appears. Enter a subject and case notes to substantiate denying the application then click **Save**.
    - iv. The Contact page appears. Click the **Programs** tab.
  - c. The Programs page appears. Click the **List Actions Menu** associated with the correct Energy program then select **Deny**.
  - d. The Deny Program Request pop-up appears. Click the **Denial Reason** drop-down menu then enter comments then click **Save**.
    - i. The Programs tab appears. The Energy Application status has changed from *Submitted* to *Disposed*.
  - e. To withdraw the application, click the **List Actions Menu** then select **Withdraw** instead of *Deny* on step 26.d.).
2. Print the approval or denial notice:
    - a. On the Energy Application, click the **Contact** tab.
    - b. The Notes page displays. Click the **Communications** folder
    - c. The Communications page displays. Click the **List Actions Menu** associated with form NFDSS-8107 then select **View/Print**.

- d. Check the application for accuracy. Print then close the PDF file.

**Notes:** The approval/denial notice is also located:

- i. On the head of household's Person page click the **Client Contact** tab then click the **Communications** folder.
  - ii. On the Energy Income Support case click the **Case Details** tab then click the **Communications** folder.
  - iii. The approval/denial notice opens as a PDF file. 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).
- e. The Communications page on the Energy Application displays. To update the notice's status from Draft to Sent:
    - i. Click the **List Actions Menu** then select **Edit**.
    - ii. The Edit Pro Forma Communication pop-up appears. Click the Communication Status **drop-down menu** then select **Sent**.
    - iii. Click **Save**.

**Note:** *Sent* status indicates that the user has provided the form to the client. Central Print will not mail this form to the client.

3. View the Pledge Payment Status:
  - a. Navigate to the Energy Application page. Click the **Programs** tab.
  - b. Click the **toggle** associated with the Program to review details.
4. To add case notes to the Energy Income Support case:
  - a. Click the **Related Cases** tab.
  - b. The Related Cases page displays. Click the **reference number hyperlink** associated with the Energy Income Support case.
  - c. The Energy Income Support Case displays. Click the **Case Details** tab.
  - d. The Notes page displays. Click **New** hyperlink.
  - e. The New Note pop-up appears. Enter and select the applicable information then click **Save**.
5. The Notes page on the Energy Income Support case displays.