

Phase I - Module 5

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Keying Energy Applications

Scenarios are located in Module 5 folder.

Applicants can apply through ePASS, by mail/fax. In-person, or over the telephone.

New vs. Subsequent

Application Process	When to Use	Path in CCE
NEW	<ul style="list-style-type: none"> For household's first Energy Assistance application in NC FAST If the household composition has changed since the household's last Energy application. 	On the head of household's <i>Person Page</i> , click the Applications tab then click New Application hyperlink.
SUBSEQUENT	The household's next Energy Assistance application if the household's composition has NOT changed from the previous application.	On the <i>Energy Income Support</i> case, click the Tab Actions Menu then select Add Energy Application .

Job Aids

Energy – Application Process Decision Tool
Energy – LIEAP Application to Case
Energy – CIP Application to Case
Energy – CIP LIEAP Combined Application to Case

Energy – Subsequent Application Process

Tips to remember before you key an application:

- Check to make sure the application is signed if not done in person.
- Ensure all documentation has been gathered and/or information has been requested.
- Search for a Person.
- Register the individual(s) if not already registered.
- Complete an Energy Benefits Search using the applicant(s) social security number or CNDIS number.
- Decide which application type is needed – ‘Add Application’ (existing case with same household composition) or new application.
- CIP may pay multiple providers (ex. Electric and wood). LIEAP will only pay the primary heat source.

Now start the application process. Utilize the scenarios given in this module to demonstrate and guide students through the steps in class. Homework should be given to each student to practice outside of class.

Match Clients in NC FAST

From the submitted application click on the **Clients Tab** to make sure everyone is matched. If not, perform the match client process.

Processing and Determinations

FNS & Work First Tab – Review here to look at the income or expenses that were used for other programs.

Authorizing an Approval:

Authorize use the ellipses (three dots at top right corner of app.

The application status will change to disposed.

Go to Contacts, communications and Print notice DSS 8107 and mark as *SENT*.

OVS |The Work Number | SAVE

Online Data – the use of the SSN to obtain online data matches in NC FAST for each unit member’s wage and UIB data to discover leads possible wages, previous work history, and potential eligibility for UIB.

The Work Number database provides comprehensive verification services for commercial and government verifiers, employers and employees.

The fee-based system to check immigration status is the **System Alien Verification** for **Entitlements**. SAVE must be run for every application with an eligible or ineligible alien in the household.

Questions regarding citizenship when keying a CIP application.

1. "What is the claimant's citizenship status?"
2. How was citizenship verified?"

Forms/Notices

Discuss the forms/notices that are common for the Energy Assistance Programs.

Energy Programs Notice of Approval/Denial - DSS 8107
Language Services Agreement – DSS 10001
NC Rights and Responsibilities for Public Assistance – NC FAST 20009
Low Income Energy Assistance Program/Crisis Intervention Program Information Needed to Complete Your Application - DSS 8185
Energy Program Application – DSS 8178

Timeframes

CIP

With a current heating/cooling source ... If no verification is needed for CIP the application should be processed within 48 hours (2 business days) of the application date.

If verification is needed, a DSS 8185 must be completed and tracked.

Without a current heating/cooling source... without a heating/cooling source and no verification needed the CIP application must be processed within 18 hours of the date of application.

If verification is needed, the applicant has 2 business days to return the requested information and the worker has 18 hours (1 day) to process it, a DSS 8185 must be completed and tracked.

LIEAP

Applications must be processed within 10 business days from the application date. If information is required, contact the household by phone to resolve the change. If unable to contact the household by phone, send the household a DSS-8185 requesting the information. Allow household 10 business days to provide information.

Income Support Navigation

Demonstrate in the CCE how to navigate the Income Support page. This will allow students to familiarize themselves with how to navigate these areas in the CCE.

NOTE: There is no dashboard for Energy Programs like there is for other programs.

NC FAST Eligibility Worker Enter Ref. Number or Keyword Welcome NCFast USER22240

Home Clients and Outcomes Inbox Calendar Reports

Person Search X Sam Smith X Income Support Application (111461020) X

Income Support Application (111461020) **A**

Sam Smith **B** Submitted Issues (0)

Primary 47 years

Income Support Application 111461020

Application Date 5/1/2018
Preferred Contact Not Requested
Interpreter Language Not Requested
Programs Food and Nutrition Services.

NCFast USER80484

Home All Documents Clients Programs Timers Evidence Related Cases Eligibility Checks Ineligibility Period Appeals Work Eligibility Administration Online Data

Home

Application Details

Submitted Date Time 5/1/2018 14:35 Method of Receipt In-Person
Expedited Yes Source
Revised Application Date Date of Discouragement
Discouragement Type

Program Applied For

Program	Disposition	Disposed On	Reduce Resources
Food and Nutrition Services	Pending		...

Eligibility Checks

Date	Checked By	Result
5/1/2018 14:46	NCFast USER80484	Ineligible for all programs checked.

C **D**

THE APPLICATION PAGE



Find the "Income Support Application" and its number here. Below is key status information about the application



Edit Case details, Check and Review Eligibility, Ready for Determination, Add clients, programs, etc.



Select a tab to see:

- Clients on the case
- Programs applied for
- Timers, interview (a calendar), and Related Cases
- Access the Evidence Dashboard
- Eligibility Checks, Ineligible Periods
- Appeals, Contact (communications)
- Work Eligibility status and history
- Administration



Programs Applied for and Eligibility Checks for the person display on the Home Tab.

Here's where case management starts with a claimant's application information collected during the Guided Interview and the programs, they are determined eligible for.

Documentation

Demonstrate how to complete the narrative process. **Narrate all actions**, this should be a complete rationale of the outcome, how you verified information and any forms you sent.

Step-by Step Instructions

1. Navigate to the Person page. Click the **Client Contact** tab.

The screenshot shows the profile of Jane Crow, located at 143 MARTIN LUTHER KING PKWY, DURHAM, North Carolina, 27713. She is female, born 1/1/1975, and is 45 years old. The bottom navigation bar includes tabs for Home, All Documents, Evidence, Care and Protection, Program Integrity, Issues and Proceedings, Financial Transactions, Referrals, **Client Contact** (highlighted with a red box), and Administration.

Note: For navigation steps to the Person page, refer to Searching for Persons job aid.

2. The Notes page displays. Click **New**.

The screenshot shows the 'Notes' page for Jane Crow. It includes a 'New...' button (highlighted with a red box), a 'Time Remaining' field (marked as a required field), and date pickers for 'From Date' and 'To Date'. There are also 'Filter' and 'Reset' buttons.

3. The New Note pop-up appears. Enter and Select applicable information then Click **Save**.

Note: Text must be entered when creating a note either in the summary or comment section or both.

The screenshot shows the 'New Note' pop-up form. It includes a 'Time Remaining' field (29:47), a 'Subject' field, a 'Priority' dropdown (set to Medium), and a 'Sensitivity' dropdown (set to 1). There is a rich text editor with a toolbar and a large text area. At the bottom, there are 'Save' (highlighted with a red box) and 'Cancel' buttons.

- The Notes page displays the newly created note.

Subject	Last Update	Entered By	Date	Priority	Status
Testing	Testing only	NCFast USER68732	3/12/2020 15:40	Medium	Canceled
Testing	A new address given 03/11/2020	NCFast USER68732	3/12/2020 15:37	Medium	Active

Adding Notes to Approved Cases

- Navigate to the Integrated Case then click the **Contact** tab.
- The Notes page displays. Click **New**.
- The New Note pop-up appears.
 - Enter or select required information: **Subject**, **Priority**, and **Sensitivity**.
 - Add note content to the text box.
 - Click **Save**.
- The new note is displayed on the Notes page.

Edit or Delete a Note

- Navigate to the Notes page. Click the **List Actions Menu** for the note to be modified then select **Edit** (or **Delete**).
- The Edit Note pop-up appears. Update the applicable information then click **Save**.
- The Notes page displays the updated communication.

Note: When a note is deleted, it will still be listed on the Notes page but with a Status of *Cancelled*.

Cited Sources

Buncombe County DSS Training Curriculum

NCDHHS Energy Programs Policy Manuals [EP Policies/Manuals – NCDHHS Policies and Manuals](#)

NC FAST HELP

https://ncfasthelp.nc.gov/FN_B/FN_B/server/general/projects/FAST_Help/FAST_Help.htm