

Adding and Removing Documents in NC FAST

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Overview

This job aid describes how the functionality allows county users to complete the file upload process for single and multiple documents within one screen. This job aid describes how to attach files, such as Word documents, PDF documents, audio files (Voice signatures) etc., in NC FAST. This job aid describes how to detach a document in the All-Documents tab.

Notes:

- Drag and Drop procedure follows the same structure as single file upload that can be performed at the person page. PDC and income support.
- Caseworkers can only detach a document from the All Documents tab.
- On the ISC, IAAC, Traditional PDC and MAGI PDC caseworkers can only cancel a document on the Clients Contact tab. This changes the name hyperlink to regular text.

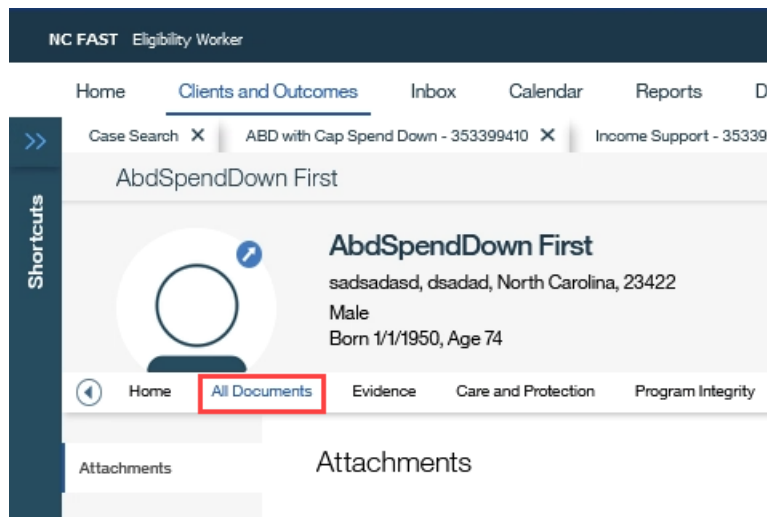
Step-by Step Instructions

Single Document Attachment on the Person Page – All Documents Tab

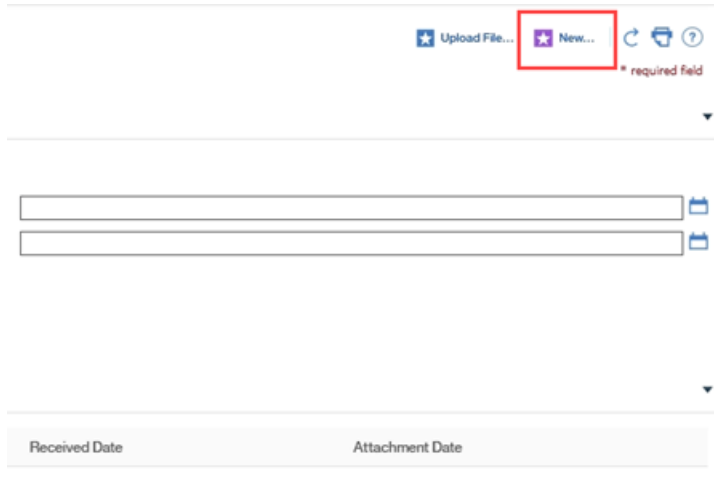
1. Navigate to the Person Page then click the **All Documents** tab.

Note: The ability to view attachments is based on the program (Economic Benefits and/or Child Welfare) a user role has access to. These limitations are applied at the

Application and Case Level. The person page is shared across both Areas, therefore both Areas can view attachments at the person level.



2. Click the **Attachments** folder. The Attachments page displays then click **New**.



3. The New Attachment pop-up appears. Click **Browse**.

New Attachment



* required field

File

Browse...

Location

Reference

Category *

Receipt Date

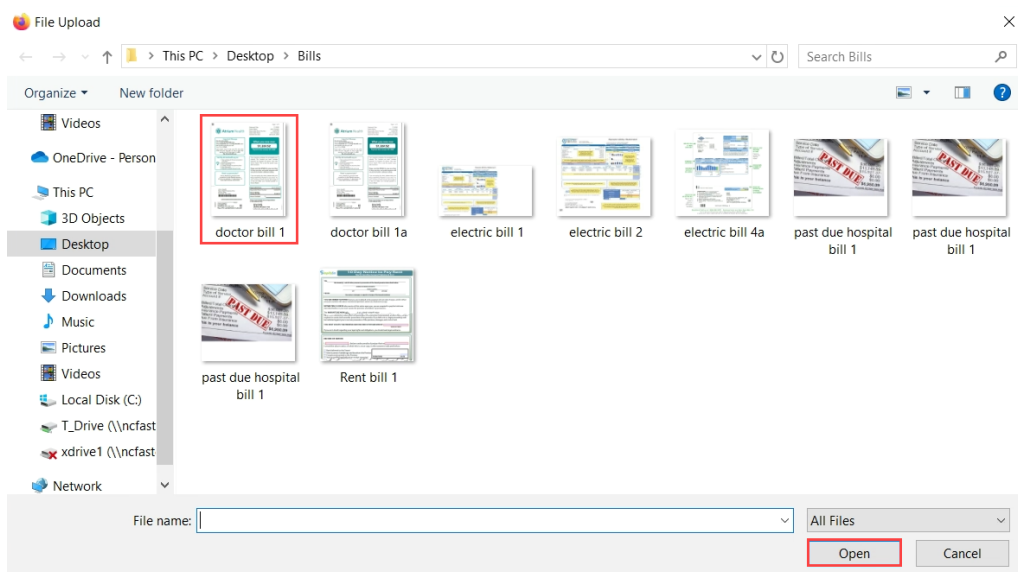
Sub-Category *

Description *

Save

Cancel

- The File Upload screen displays. Navigate to document location and select the **document** to upload/open.
- Click **Open**. The New Attachment pop-up displays.



- The New Attachment pop-up appears. Enter the applicable criteria then click **Save**.
 - Category:** Defined by the NC FAST attachment taxonomy
 - Sub-Category:** Pre-set list of sub-categories determined by the selected category
 - Receipt Date:** Date of when document was received by the county
 - Description:** Description of document

New Attachment



* required field

File	Browse...		
	doctor bill 1.png		
Location	<input type="text"/>	Reference	<input type="text"/>
Category *	<input type="text"/>	Receipt Date	<input type="text" value="6/18/2024"/>
Sub-Category *	<input type="text"/>		
Description *	<div></div>		

[Save](#) [Cancel](#)

Note: Category, Sub-category, and Description are required fields. Refer to the *Taxonomy Reference Guide* for further guidance on selecting taxonomy.

7. The Person page displays. The document is saved to the Person page.
8. Caseworkers can locate the document by clicking **Search**.

Attachments

Search Criteria

Users can search by Category and Sub-Category or Document Type.

Category	<input type="text"/>	Received Date	<input type="text"/>
Sub-Category	<input type="text"/>	Attachment Date	<input type="text"/>
Document Type	<input type="text"/>		

[Search](#) [Reset](#)

Search Results

Description	Category	Sub-Category	Document Type
-------------	----------	--------------	---------------

Notes:

- After clicking Search, caseworkers are able to choose the Page Size and select a specific page if needed.
- File size submission is limited to 500 pages or approximately 100 mb. If the file size is exceeded, the user will get an error message upon submission.

9. In the Search Results you will see the attached document.

Attachments

Search Criteria

Users can search by Category and Sub-Category or Document Type.

Category Received Date

Sub-Category Attachment Date

Document Type

Search Results

Description	Category	Sub-Category	Document Type
test of doc attachment	Education	Financial Aid	

Single Document attachment using the Browse DMS Feature

1. Navigate to the applicable Application or Case then click the **Evidence** tab.

NC FAST Eligibility Worker

Home Clients and Outcomes Inbox Calendar Reports Dashboards

Case Search X ABD with Cap Spend Down - 353399410 X Income Support - 353399401 X AbdSpendDown First X Incom

Income Support Application (112096549)

AbdSpendDown

Primary 74 years

Income Support Application

Application Date 2/9/2023
Preferred Contact Not Requested
Interpreter Language Not Requested
Programs Medical Assistance.

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

Note: Evidence attachments can only be added to an Application or Case.

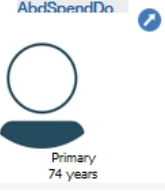
2. The Evidence Dashboard displays. Click the **Verifications** folder.

NC FAST Eligibility Worker

Home Clients and Outcomes Inbox Calendar Reports Dashboards

Case Search X ABD with Cap Spend Down - 353399410 X Income Support - 353399401 X AbdSpendDown First X Income Suppo

Income Support Application (112096549)



Primary
74 years

Income Support Application

Application Date 2/9/2023
Preferred Contact Not Requested
Interpreter Language Not Requested
Programs Medical Assistance.

Home All Documents Clients Programs Timers Evidence Related Cases Eligibility Checks Ineligibility Period Appe

Dashboard
Active
In Edit
Verifications
Issues
Incoming Evidence

Verifications

Outstanding All

Item for Verification	Evidence Type

- The Verifications page displays. Click the **List Actions Menu** then select **Add Proof**.

Verify... | Refresh | Print | Help

Participant	Mandatory	Due Date
AbdSpendDown First	No	

...

Add Proof...

- The Add Proof pop-up displays. Enter the Case Participant then select the applicable data.
- Scroll down to the Attachment section and click the **Browse** drop-down. Then select **Browse DMS**.

Attachment ▼

Please specify a file to attach or enter a file location and/or reference.

Browse ▼

Browse DMS 🔍 ✕

Comments ▼

6. Click the Browse DMS **magnifying glass**.

Attachment ▼

Please specify a file to attach or enter a file location and/or reference.

Browse ▼

Browse DMS 🔍 ✕

Comments ▼

7. The Attachments Search pop-up appears. Select **Category** and **Sub-Category** or **Document Type** but not both. Click **Search**.

Attachments Search



* required field

Search Criteria

Users can search by Category and Sub-Category or Document Type.

Category	<input type="text"/>	Received Date	<input type="text"/>
Sub-Category	<input type="text"/>	Document Type	<input type="text"/>
Attachment Date	<input type="text"/>		

Search Results

Action	Attachment Name	Received Date	Category	Sub-Category	Document Type	Attachment Date
--------	-----------------	---------------	----------	--------------	---------------	-----------------

Note: Category and Sub-Category or Document Type is required. Refer to the *Taxonomy Reference Guide* for further guidance on selecting taxonomy.

- The Search Results displays. Click the **Select** hyperlink for the applicable attachment.

Attachments Search



* required field

Search Criteria

Users can search by Category and Sub-Category or Document Type.

Category	<input type="text"/>	Received Date	<input type="text"/>
Sub-Category	<input type="text"/>	Document Type	<input type="text"/>
Attachment Date	<input type="text"/>		

Search Results

Action	Attachment Name	Received Date	Category	Sub-Category	Document Type	Attachment Date
Select	5/9/2023_Application.pdf	5/9/2023				5/9/2023
Select	doctor bill 1.png	6/17/2024	Education	Financial Aid		6/17/2024

- The Add Proof pop-up displays. Click **Save**.

Add Proof



* required field

Item

Date Received

Provided By

If the provider of the item is a case participant, please select from below.

Case Participant

If the provider of the item is registered on the system, please select from below.

Participant

If the provider of the item is not registered on the system please enter their name in the field below.

Name

Attachment

Please specify a file to attach or enter a file location and/or reference.

Browse

Browse DMS

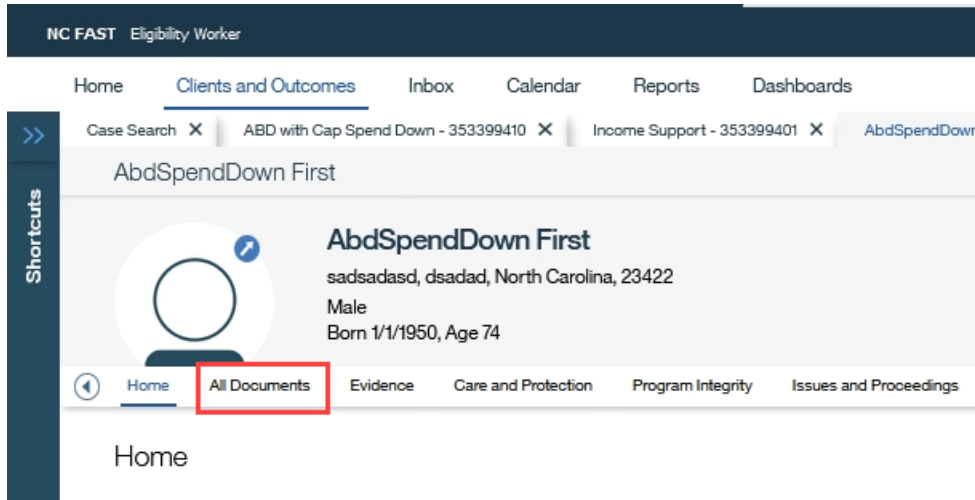
Comments

Save

Note: File size submission is limited to 500 pages or approximately 100 mb. If the file size is exceeded, the user will get an error message upon submission.

Detaching an attachment in the All-Documents tab

1. Navigate to the Person page then click the All Documents tab.



NC FAST Eligibility Worker

Home Clients and Outcomes Inbox Calendar Reports Dashboards

Case Search X ABD with Cap Spend Down - 353399410 X Income Support - 353399401 X AbdSpendDown

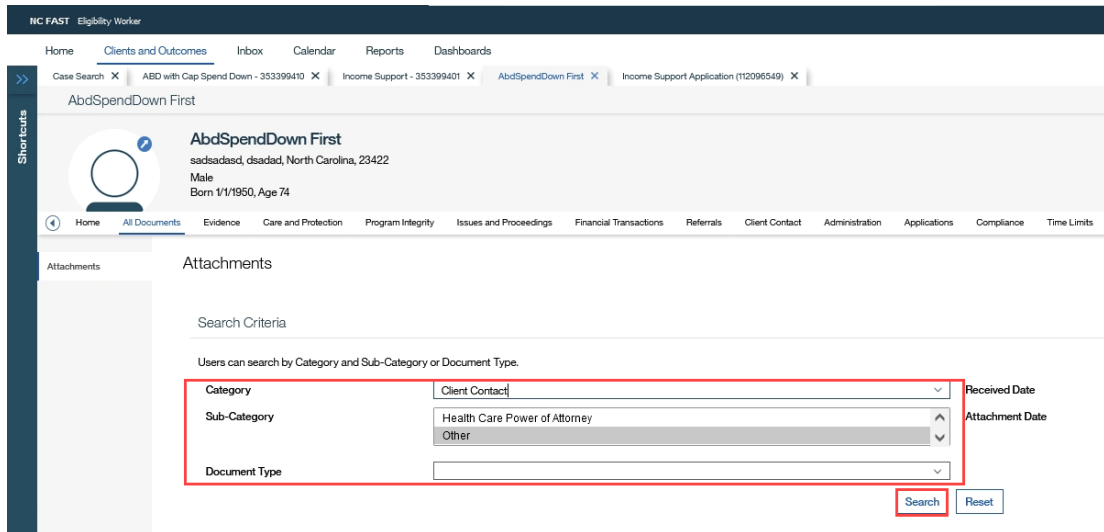
AbdSpendDown First

AbdSpendDown First
sadsadasd, dsadad, North Carolina, 23422
Male
Born 1/1/1950, Age 74

Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings

Home

- The Attachments page displays. Select **Category** and **Sub-Category** or **Document Type** but not both. Click **Search**.



NC FAST Eligibility Worker

Home Clients and Outcomes Inbox Calendar Reports Dashboards

Case Search X ABD with Cap Spend Down - 353399410 X Income Support - 353399401 X AbdSpendDown First X Income Support Application (112096549) X

AbdSpendDown First

AbdSpendDown First
sadsadasd, dsadad, North Carolina, 23422
Male
Born 1/1/1950, Age 74

Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings Financial Transactions Referrals Client Contact Administration Applications Compliance Time Limits

Attachments

Attachments

Search Criteria

Users can search by Category and Sub-Category or Document Type.

Category Client Contact Received Date

Sub-Category Health Care Power of Attorney Attachment Date

Other

Document Type

Search Reset

Notes: Caseworkers can click Search without entering any search criteria to view all attachments. After clicking Search, caseworkers are able to choose the Page Size and select a specific page if needed.

- The Search Results display. Click the applicable **List Actions Menu** then select **Detach**.

[Upload File...](#)
[New...](#)
[Refresh](#)
[Help](#)

* required field

Received Date	Attachment Date
6/17/2024	6/17/2024

...
[Edit...](#)
[Detach...](#)

4. Detach pop-up appears. Click the **Detach Reason** then select the applicable Detach Reason.
5. Enter any required Comments then click **Submit**.

Detach

[?](#)
[×](#)

* required field

Detach Reason *

Comments *

Submit

Cancel

Notes:

- The Detach Reason and Comments will be visible to the Lead Worker and Supervisor in the My County's Unindexed Attachments.
- Once an attachment is detached, the line item in the Search Result field will be removed.

Note: The ability to view attachments is based on the program (Economic Benefits and/or Child Welfare) a user role has access to. These limitations are applied at the

Application and Case Level. The person page is shared across both Areas, therefore both Areas can view attachments at the person level.

6. The Person Page displays. Verify the document has been detached by clicking **Search**.

Attachments

Search Criteria

Users can search by Category and Sub-Category or Document Type.

Category Received Date

Sub-Category Attachment Date

Document Type

Search Results

Description	Category	Sub-Category	Document Type

Notes:

- After clicking Search, caseworkers are able to choose the Page Size and select a specific page if needed.
- File size submission is limited to 500 pages or approximately 100 mb. If the file size is exceeded, the user will get an error message upon submission.

7. In the Search Results the document should not appear.

Single Document Attachment using Client Contact tab

1. From the Person Page, click the **Client Contact** tab.

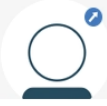
Note: The ability to view attachments is based on the program (Economic Benefits and/or Child Welfare) a user role has access to. These limitations are applied at the Application and Case Level. The person page is shared across both Areas, therefore both Areas can view attachments at the person level.

NC FAST Information Support Unit

Home Information Support Inbox Calendar Reports Dashboards

Case Search X ABD with Cap Spend Down - 353411128 X Income Support - 353411111 X Abd first X

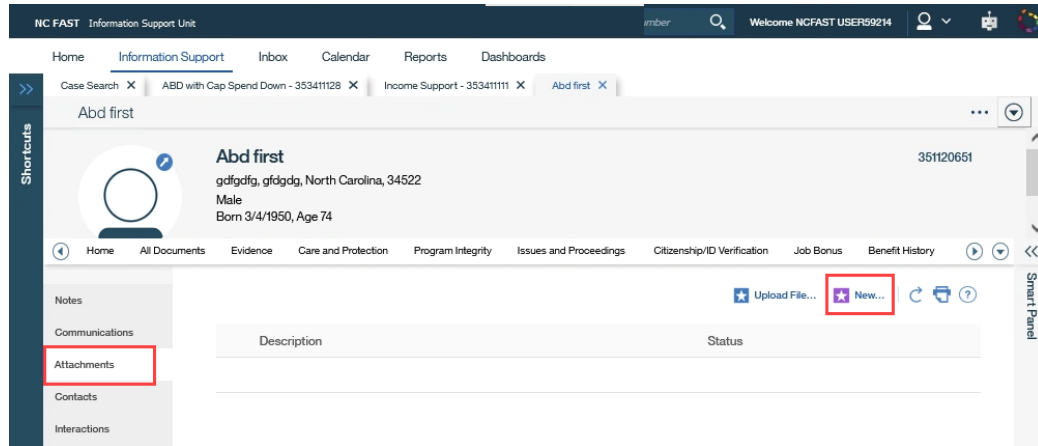
Abd first

 **Abd first**
gdfgdfg, gfdgdfg, North Carolina, 34522
Male
Born 3/4/1950, Age 74

Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings Financial Transactions Referrals **Client Contact** Administration

Home

2. Click the **Attachments** folder. The Attachments page displays. Click the **New** hyperlink.



3. The New Attachment pop-up appears. Click **Browse**.

New Attachment

File

Location

Category *

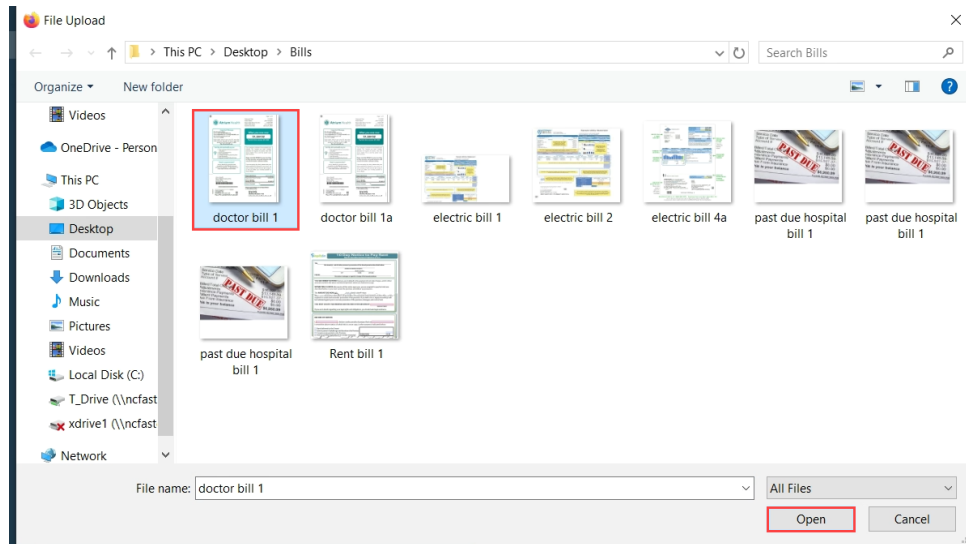
Sub-Category *

Description *

Reference

Receipt Date

4. The File Upload screen displays. Navigate to the document location then select the **document** to upload/open.
5. Click **Open**. The New Attachment pop-up appears.



6. Enter New Attachment criteria then click **Save**.

- **Category:** Defined by the NC FAST attachment taxonomy
- **Sub-Category:** Pre-set list of sub-categories determined by the selected category
- **Receipt Date:** Date of when document was received by the county
- **Description:** Description of document

Note: Category, Sub-category, and Description are required fields. Refer to the *Taxonomy Reference Guide* for further guidance on selecting taxonomy.

New Attachment

? ×

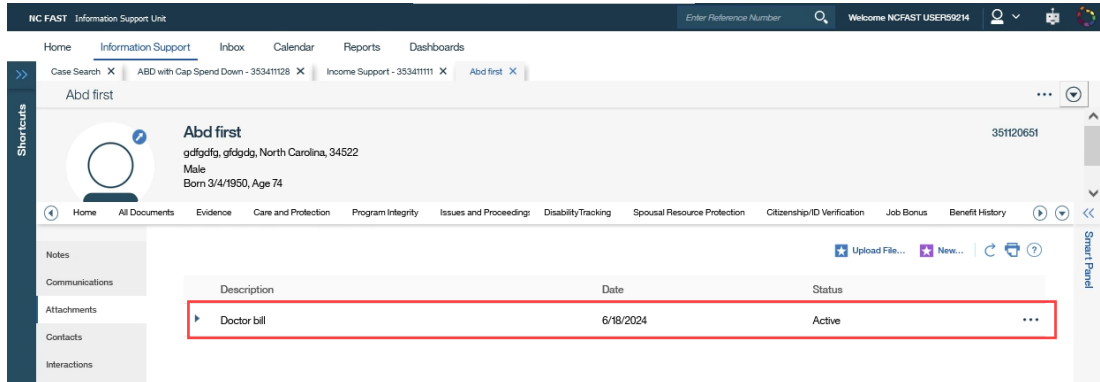
* required field

File	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Browse...</div> doctor bill 1.png		
Location	<input type="text"/>	Reference	<input type="text"/>
Category *	<input type="text"/>	Receipt Date	<input type="text" value="6/18/2024"/> <input style="float: right; width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="📅"/>
Sub-Category *	<input type="text"/> <div style="text-align: right; width: 20px; height: 20px; border: 1px solid #ccc; position: relative;"> ↑ ↓ </div>		
Description *			

Save

Cancel

7. The Person page displays. The document is saved to the Person page.

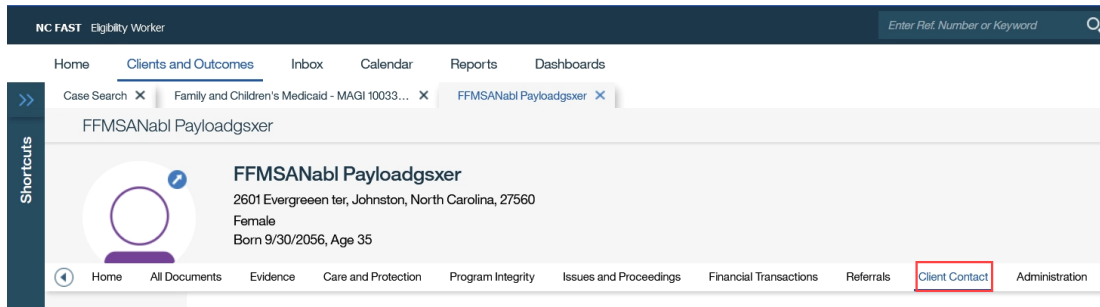


Notes:

- After clicking Search, caseworkers are able to choose the Page Size and select a specific page if needed.
- File size submission is limited to 500 pages or approximately 100 mb. If the file size is exceeded, the user will get an error message upon submission.

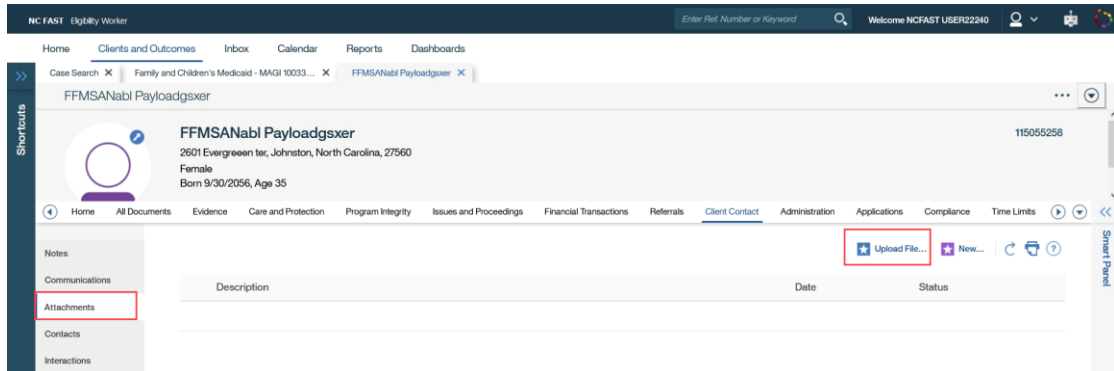
Multiple Document upload on Person Page – New Process

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



Note: For navigation steps to the Income Support Application, refer to *Searching for Applications* job aid.

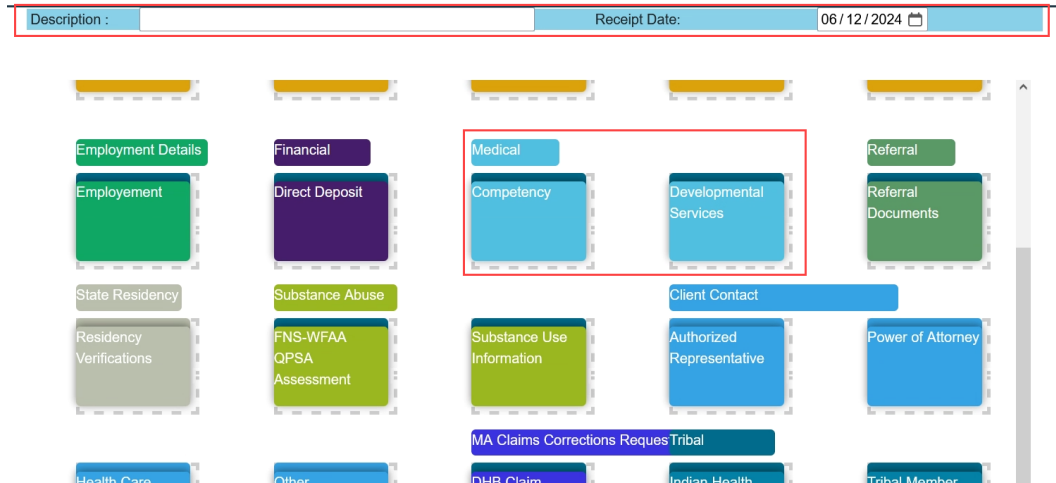
2. The Client Contact displays. Click the **Attachments** folder then click the **Upload File** hyperlink.



3. The Multi File Upload pop-up appears. Enter the applicable information for:

- Description:** Space for user to enter description of uploaded item(s).
- Receipt Date:** Space for user to enter date item(s) received.
- Participant Dropdown** for the caseworker to select the case participant.

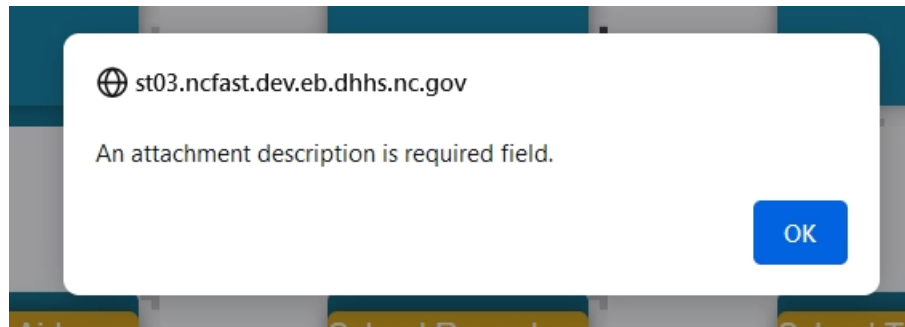
Note: The Participant drop-down will not display when uploading files directly to a person page.



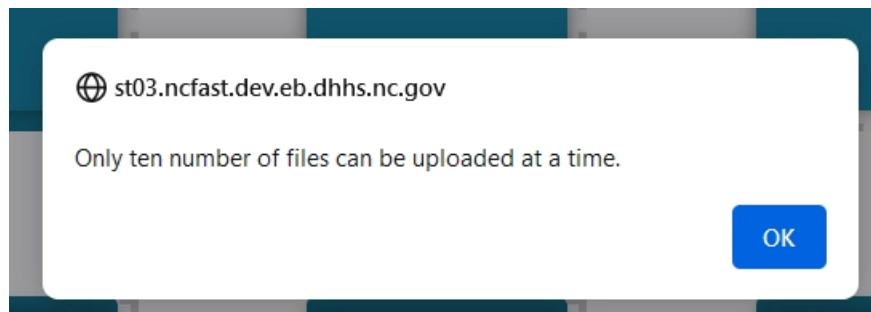
Note: Category files are different colors. The Sub-category folders are color coded to match the Category folders.

Notes: There are validations for:

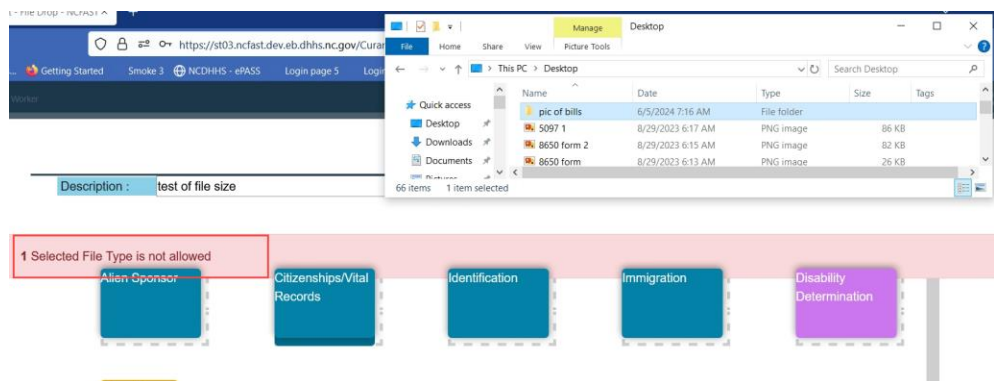
- If Caseworker drags and drops a file into a folder and does not enter any text into description field, it will not upload files and displays the file you tried to upload. Click the **back arrow** to return to NC FAST page.



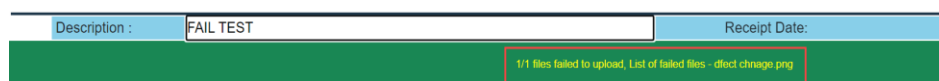
- If Caseworker drags and drops a file into a folder and the file size exceeds 100mb. It will show a validation error.
- If the caseworker drags and drops more than 10 files in one action into a folder.



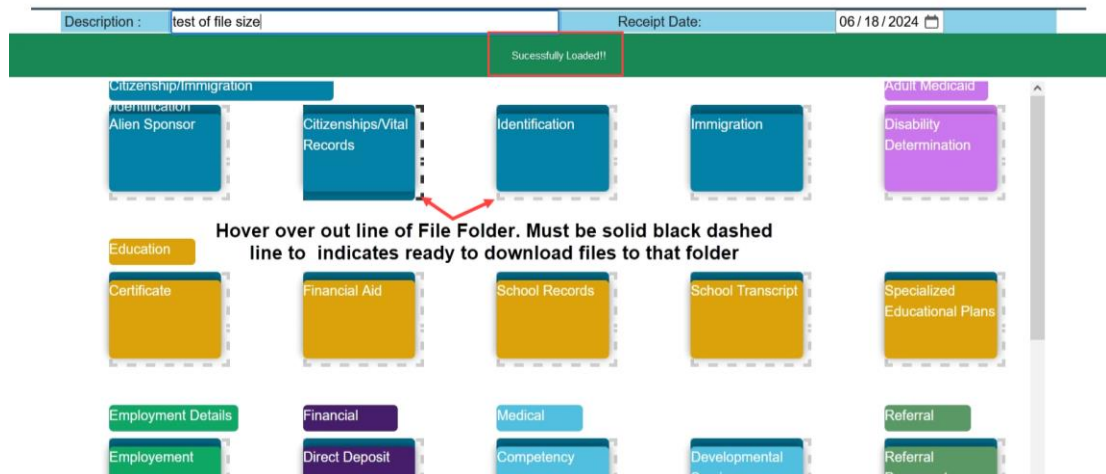
- If the caseworker drags and drops a file which is not a supported file type. Supported file types are, (PDF, JPEG, BMP, Word document).



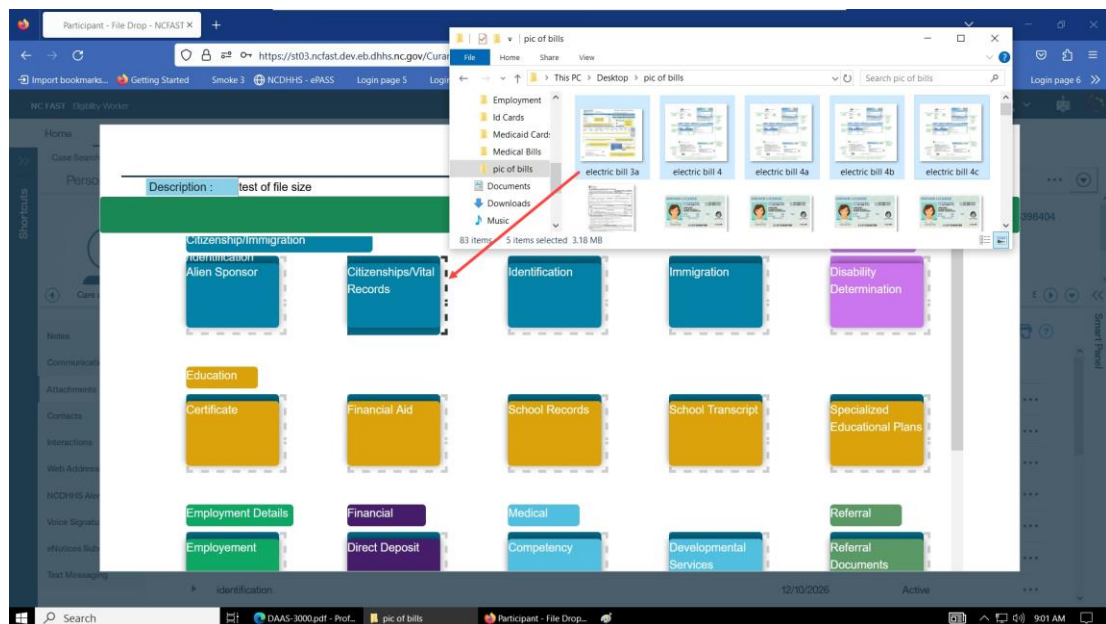
- When FileNet is unavailable, and files fail to upload caseworker will see green bar with **YELLOW** text.



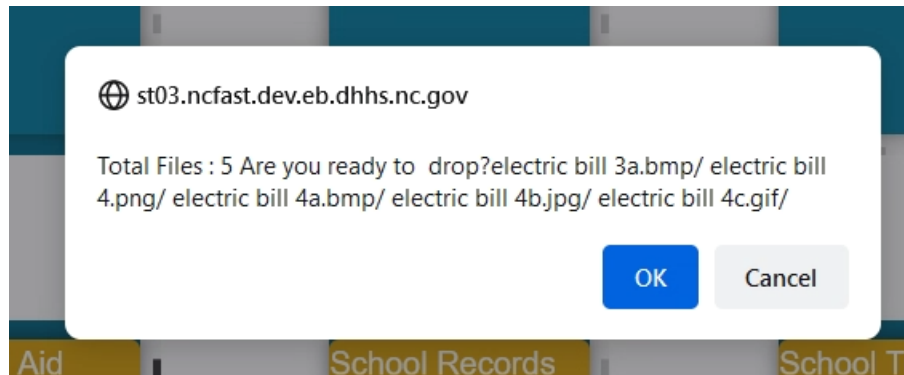
4. Navigate to where the file is located.
5. Highlight the file and drag it to the applicable folder. Drop the file(s) into the applicable folder once the **dotted grey outline turns black**.



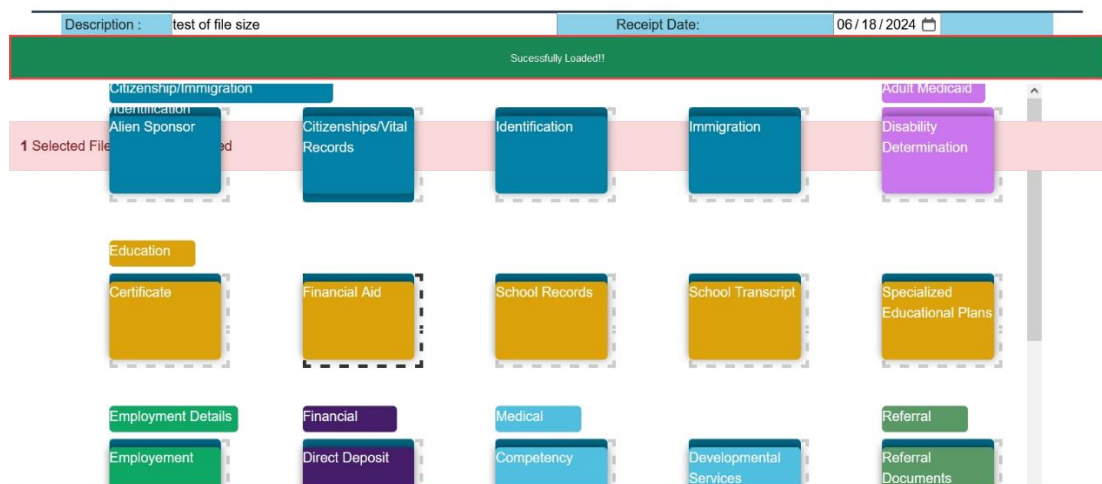
6. When selecting multiple documents hold down the **Ctrl** key to select **multiple documents**. Then drag and drop the files into the applicable folder.



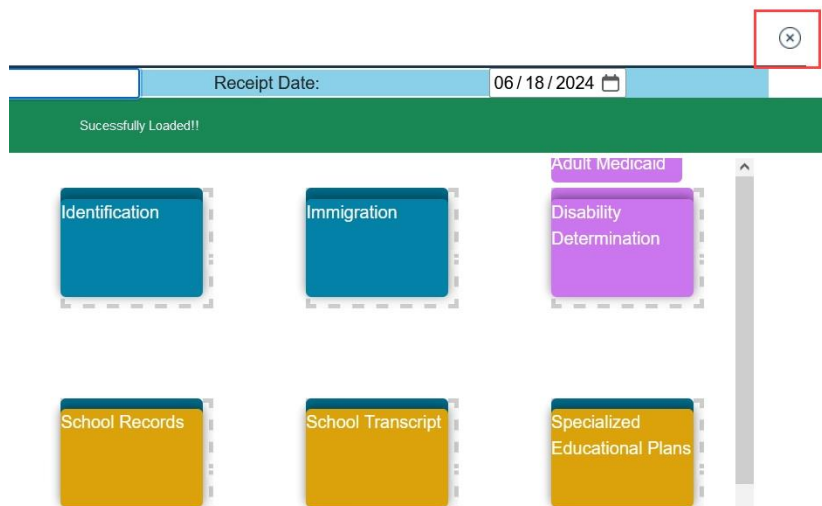
7. The Confirmation pop-up appears. Click **OK**.



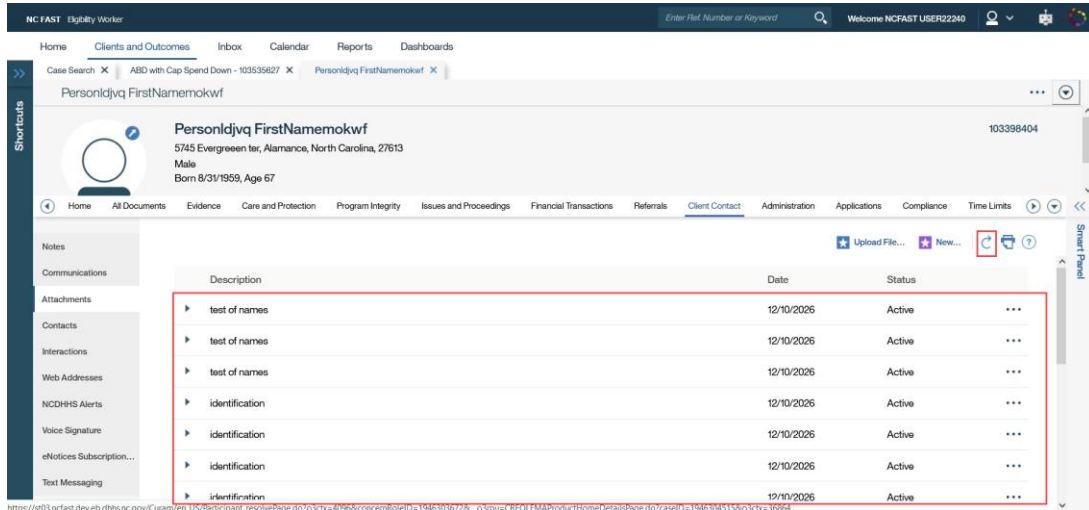
8. The green status bar will indicate when the files have been successfully uploaded.



9. Once the caseworker has completed uploading all applicable files, click **X** to close the pop up.



10. The Attachments page will display. Refresh the page and the document will display on the list.



NC FAST Eligibility Worker

Enter Ref. Number or Keyword

Welcome NCFast USER22240

Home Clients and Outcomes Inbox Calendar Reports Dashboards

Case Search X ABD with Cap Spend Down - 103535627 X PersonIdjvq FirstNamemokwf X

PersonIdjvq FirstNamemokwf

PersonIdjvq FirstNamemokwf
5745 Evergreen ter, Alamance, North Carolina, 27613
Male
Born 8/31/1959, Age 67

103398404

Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings Financial Transactions Referrals Client Contact Administration Applications Compliance Time Limits

Notes

Communications

Attachments

Contacts

Interactions

Web Addresses

NCDHHS Alerts

Voice Signature

eNotices Subscription...

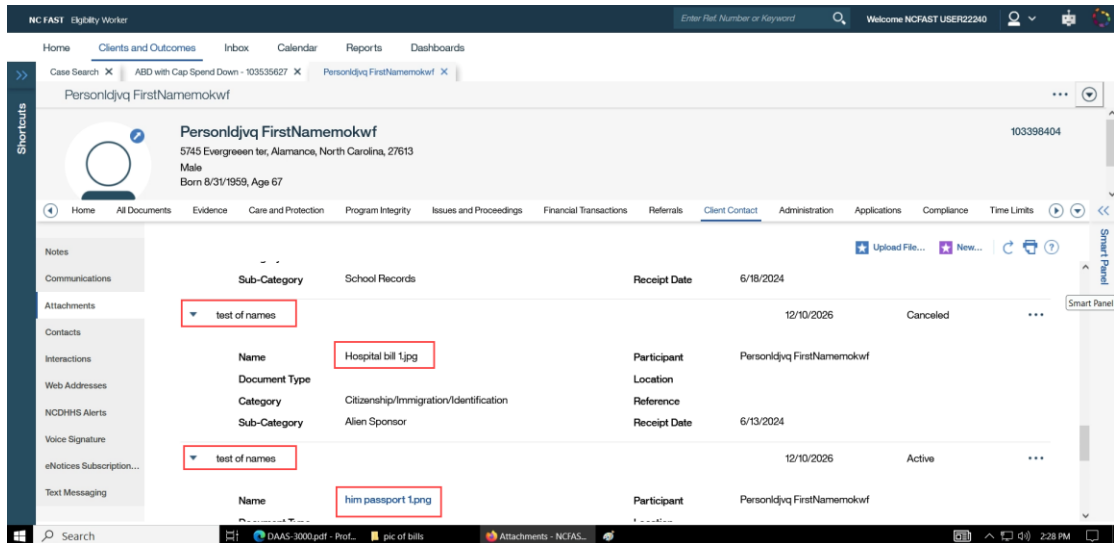
Text Messaging

Upload File... New...

Description	Date	Status
test of names	12/10/2026	Active
test of names	12/10/2026	Active
test of names	12/10/2026	Active
identification	12/10/2026	Active
identification	12/10/2026	Active
identification	12/10/2026	Active
identification	12/10/2026	Active

https://n03.ncfast.dev.dhhs.nc.gov/Caram/en_US/Participant_resolvePage.do?context=4096&concentRoleID=1946303672&_o3jou=CREOLEMAPProductHomeDetailPage.do?caseID=1946304515&o3ctu=3684

11. Click the **toggle** to see the different file names with the same Category description name.



NC FAST Eligibility Worker

Enter Ref. Number or Keyword

Welcome NCFast USER22240

Home Clients and Outcomes Inbox Calendar Reports Dashboards

Case Search X ABD with Cap Spend Down - 103535627 X PersonIdjvq FirstNamemokwf X

PersonIdjvq FirstNamemokwf

PersonIdjvq FirstNamemokwf
5745 Evergreen ter, Alamance, North Carolina, 27613
Male
Born 8/31/1959, Age 67

103398404

Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings Financial Transactions Referrals Client Contact Administration Applications Compliance Time Limits

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NCDHHS Alerts

Voice Signature

eNotices Subscription...

Text Messaging

Upload File... New...

Sub-Category	School Records	Receipt Date
test of names	12/10/2026	Canceled
Name	Hospital bill 1.jpg	Participant
Document Type	Citizenship/Immigration/Identification	Location
Category	Alien Sponsor	Reference
Sub-Category	6/13/2024	Receipt Date
test of names	12/10/2026	Active
Name	him passport 1.png	Participant

Canceling (or removing) an attachment on PDC, ISC, or Application using Client Contact tab

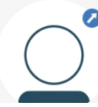
1. Navigate to the Person page then click the **Client Contact** tab.

NC FAST Eligibility Worker Enter Ref. Number or Keyword

Home Clients and Outcomes Inbox Calendar Reports Dashboards

Case Search X ABD with Cap Spend Down - 103535627 X Personldjvq FirstNamemokwf X

Personldjvq FirstNamemokwf

 **Personldjvq FirstNamemokwf**
5745 Evergreen ter, Alamance, North Carolina, 27613
Male
Born 8/31/1959, Age 67

Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings Financial Transactions Referrals **Client Contact** Administration

Notes

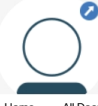
2. Click the **Attachments** Folder. The Attachment page displays. Click the **List Actions Menu** for the applicable document then select **Cancel**.

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

Home Clients and Outcomes Inbox Calendar Reports D

Case Search X ABD with Cap Spend Down - 103535627 X Personldjvq FirstNamemokwf X

Personldjvq FirstNamemokwf 103398404

 **Personldjvq FirstNamemokwf**
5745 Evergreen ter, Alamance, North Carolina, 27613
Male
Born 8/31/1959, Age 67

Home All Documents Evidence Care and Protection Program Integrity Client Contact Administration Applications Compliance Time Limits

Notes

Communications

Attachments

Contacts

Interactions

Web Addresses

NCDHHS Alerts

Description	Date	Status	
▶ test of names	12/10/2026	Active	...
▶ test of names	12/10/2026	Active	Cancel...
▶ test of names	12/10/2026	Active	...
▶ identification	12/10/2026	Active	...

Upload File... New... ?

3. The Cancel Attachment pop-up appears then click **Yes**.

Cancel Attachment ? ×

Are you sure you want to cancel this attachment?

Yes **No**

Note: Cancelling the attachment will remove the hyperlink from the title of the document and it will display Canceled.

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

Home Clients and Outcomes Inbox Calendar Reports

Case Search X ABD with Cap Spend Down - 103535627 X PersonIdjvq FirstNamemokwf

PersonIdjvq FirstNamemokwf 103398404

5745 Evergreen ter, Alamance, North Carolina, 27613
Male
Born 8/31/1959, Age 67

Home All Documents Evidence Care and Protection Program Integrity Client Contact Administration Applications Compliance Time Limits

Notes Upload File... New...

Description	Date	Status
test of names	12/10/2026	Canceled
test of names	12/10/2026	Active
test of names	12/10/2026	Active

Communications

Attachments

Contacts

Interactions

Web Addresses

4. Click the **toggle** to see that the title or file name hyperlink has been removed.

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Case Search X ABD with Cap Spend Down - 103535627 X PersonIdjvq FirstNamemokwf X

PersonIdjvq FirstNamemokwf

5745 Evergreen ter, Alamance, North Carolina, 27613
Male
Born 8/31/1959, Age 67

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test of names	12/10/2026	Canceled

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Text Messaging

Name	Document Type	Participant
Hospital bill 1.jpg	Citizenship/Immigration/Identification	PersonIdjvq FirstNamemokwf
	Category	Reference
	Sub-Category	Receipt Date

Description	Date	Status
test of names	12/10/2026	Active
test of names	12/10/2026	Active