

# Attach and Detach in NC FAST

Last Updated: 6/12/2019

## Overview

This job aid describes how to attach and detach a document in the All Document tab. This job aid also describes how to attach a document in the Evidence tab by using the Browse DMS feature.

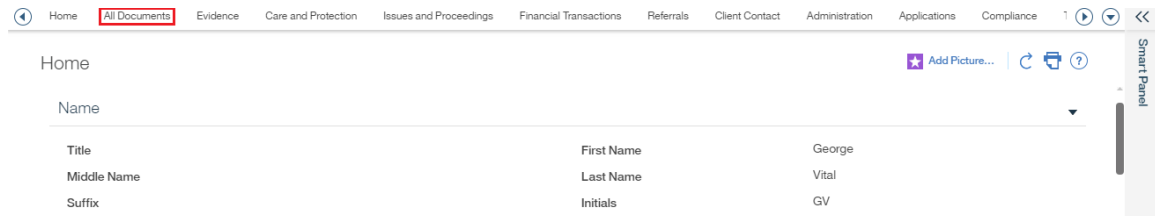
## Step-by-Step Instructions

### Creating an attachment in the All Documents tab

1. Navigate to the Person, Application, or Case's All Documents tab.

**Note:** The ability to view attachments is based on the Area (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 **All Documents** tab.



The screenshot shows the NC FAST application interface. At the top, there is a navigation bar with tabs: Home, All Documents (highlighted with a red box), Evidence, Care and Protection, Issues and Proceedings, Financial Transactions, Referrals, Client Contact, Administration, Applications, and Compliance. Below the navigation bar, the 'Home' section is visible, showing a form for a person named George. The form has fields for Title, First Name, Middle Name, Last Name, Suffix, Initials, and Vital. The 'First Name' field contains 'George', 'Last Name' contains 'Vital', and 'Initials' contains 'GV'. There is also an 'Add Picture...' button with a star icon.

3. The Attachments page displays. Click **New**.



Home All Documents Evidence Care and Protection Issues and Proceedings Financial Transactions Referrals Client Contact Administration Applications Compliance 1

Attachments

Search Criteria

Category  Received Date

Sub-Category  Attachment Date

Document Type

Search Reset

New...

\* required field

4. The New Attachment window displays. Click **Browse**.

New Attachment

File  Browse...

Location  Reference

Category \*  Receipt Date  11/15/2018

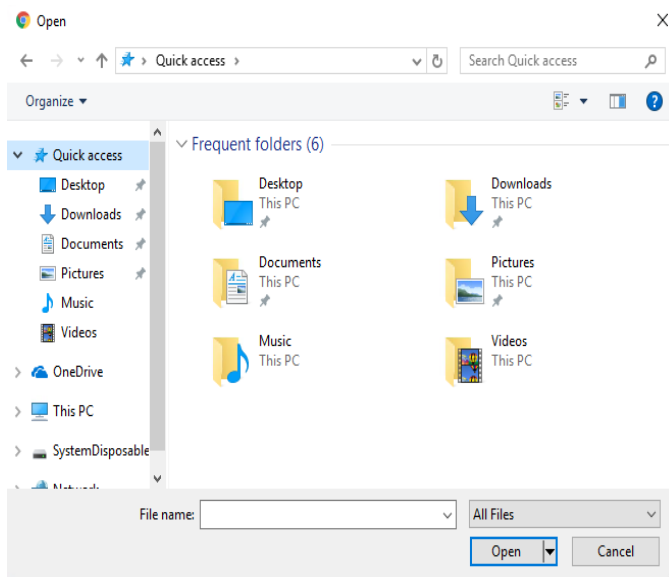
Sub-Category \*

Description \*

Save Cancel

\* required field

5. The File Upload screen displays.



6. Navigate to document location and select document(s) to upload.
7. Click **Open**. The New Attachment pop-up displays.

**New Attachment** ? ×

\* required field

File	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block; background-color: #007bff; color: white;">Browse...</div>		
	Billys Document.txt		
Location	<input type="text"/>	Reference	<input type="text"/>
Category *	<input type="text"/>	Receipt Date	<input type="text" value="11/15/2018"/>
Sub-Category *			
Description *			

Save

Cancel

8. Enter New Attachment criteria. Available options include:

**Note:** The Location field auto populates with FileNet Data.

- a. **Reference:** Associated with the application
- b. **Category:** Defined by the NC FAST attachment taxonomy

- c. **Sub-Category:** Pre-set list of sub-categories determined by the selected category
- d. **Receipt Date:** Date of when document was received by the county
- e. **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.

9. Click **Save**.

10. The document is saved to the Person, Application, or Case.

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

## Creating an attachment using the Browse DMS Feature

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

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

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

3. The Verifications page displays. Click the **ellipsis**.

Verifications ★ Open in New Tab ★ Verify... ↺ 🖨️ ?

Outstanding All

Item for Verification	Evidence Type	Participant	Mandatory	Due Date
▶ Head of Household (Identity)	Head of Household	Kelly Green	No	...

4. The Add Proof drop down displays. Click **Add Proof**.

★ Open in New Tab ★ Verify... ↺ 🖨️ ?

Mandatory	Due Date
No	...

**Add Proof...**

5. The Add Proof pop-up displays.

- a. Enter the Case Participant and select applicable data.
- b. Scroll down and select the **Browse** drop down.
- c. Select **Browse DMS**.

**Add Proof** ? ×

**Attachment** \* required field

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

Browse	<div>Browse Desktop ▾ Browse Desktop Browse DMS</div>		
File			
File Location	<input type="text"/>	File Reference	<input type="text"/>
Category	<input type="text"/>	Receipt Date	<input type="text"/>
Sub-Category	<input type="text"/>	Description	<input type="text"/>

Comments ▾

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

**Add Proof** ? ×

**Name**  \* required field

**Attachment** ▾

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

Browse	<div>Browse DMS ▾</div>	
Browse DMS	<input type="text"/>	

Comments ▾


- The Attachments Search pop-up displays. 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  Received Date  

Sub-Category  Document Type

Attachment Date  

**Search** **Reset**


**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. Select the applicable attachment.


**Attachments Search** ? ×

\* required field

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

Category  Received Date  

Sub-Category  Document Type

Attachment Date  

**Search** **Reset**

Search Results

Action	Attachment Name	Received Date	Category	Sub-Category	Document Type	Attachment Date
<b>Select</b>	TEST ATTACH.txt	6/11/2019	Income	Earned		6/11/2019
<b>Select</b>	6/9/2019_Application.pdf	6/9/2019				6/9/2019

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

Add Proof

?
x

Name

Attachment

▼

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

Browse

Browse DMS
▼

Browse DMS

🔍
✕

Comments

▼

Save
Cancel

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

## Detaching an attachment in the All Documents tab

1. Navigate to the Person, Application, or Case's All Documents tab.
2. Click **All Documents** tab.

Home
All Documents
Evidence
Care and Protection
Issues and Proceedings
Financial Transactions
Referrals
Client Contact
Administration
Applications
Compliance
1
🔍
🔄
🖨️
?

Home

Add Picture...
🔄
🖨️
?

Name

▼

Title
First Name
George
Middle Name
Last Name
Vital
Suffix
Initials
GV

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

**Note:** Click **Search** without entering search criteria to view all attachments.

4. Search Results display. Click the **ellipsis** on the line of the item to detach and select **Detach**.

Home | **All Documents** | Evidence | Care and Protection | Issues and Proceedings | Financial Transactions | Referrals | Client Contact | Administration | Applications | Compliance | Time Limits | Employment | Disability Tracking | Spousal Resource Protection

Attachments

Search Criteria

Category:  Received Date:

Sub-Category:  Attachment Date:

Document Type:

Search Reset

Search Results

Description	Category	Sub-Category	Document Type	Received Date	Attachment Date	Edit...
eeid			Letter	11/28/2018	11/28/2018	<b>Detach...</b>
Test SoapUI Document			Letter	11/28/2018	11/28/2018	

- Detach pop-up displays. Select Detach Reason from the drop-down.
- Enter mandatory Comments. Click **Submit**.

**Note:** The Detach Reason and Comments will be visible to the Lead Worker and Supervisor in the My County's Unindexed Attachments.

**Detach** ? x

\* required field

Detach Reason \*

Comments \*

Submit Cancel

**Note:** Once an attachment is detached, the line item in the Search Result field will be removed.