

Energy – Application Process Decision Tool

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Overview

The guidance in this job aid helps an Energy worker determine which application process to use to key an Energy Assistance application. The two application processes are:

- The new Energy application process involves keying an entirely new application (which creates a new Energy Income Support case).
- The subsequent Energy application process adds 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 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

What governs which application process to use?

Energy Assistance policy's definition of "household" governs which of these two application processes to follow. As used here, "household" means "household composition" (i.e., the members of the household). The Energy worker must therefore establish whether a household with the same composition has applied for Energy Assistance via NC FAST in the past. That involves performing an Energy Benefit search for each household member and evaluating the results. After verifying whether the household has applied for Energy Assistance in the past, the Energy worker will either:

- **Follow the new Energy application process:**

1. When this is a household's first application for Energy Assistance in NC FAST
 2. If household composition has changed since the last Energy application. Policy considers this a new household. Examples of changes in household composition include:
 - A member leaves the household (e.g., dies, divorces, moves)
 - A new member joins the household
- **Follow the subsequent Energy application process** whenever a household which includes the same household members applies again for Energy Assistance.

What does not impact which application process to use?

The following do not influence which Energy Assistance application process to use:

- The Energy Assistance program(s) — whether CIP or LIEAP or both — applied for (or applying for)
- The head of household ("applicant"): Any adult in a household may apply for Energy Assistance. If household composition does not change, the same person is used as head of household on subsequent Energy application (whether s/he or any other adult in the household is actually applying).
- Changes to the household's residential ("Private") address

Step-by-Step Instructions

To decide on which application process to use, the Energy worker must establish whether the same household has already applied in NC FAST for Energy Assistance. This involves performing an Energy Benefit search then locating the most recent application which includes all current household members (if one exists).

1. From the NC FAST Home page, click the **Clients and Outcomes** tab.
2. The Clients and Outcomes page displays. Click the **toggle** to expand the Shortcuts panel.
3. The Shortcuts panel expands. Click the **Searches** folder.

4. The contents of the Searches folder display. Click the **Energy Benefit** hyperlink.
5. The Energy Benefit Search page displays. Enter and/or select search criteria then click **Search**.

Notes:

- Conduct four separate searches for the head of household. Search by:
 - First Name, Last Name, Gender
 - First Name, Last Name, Gender, Date of Birth
 - Social Security number (SSN) if the household member has one
 - First Name (three letters), Last Name (three letters), Date of Birth, Gender
 - Consult the *Searching for Persons* job aid for detailed guidance.
6. Search results display. Click the hyperlinked head of household's **name** to open her/his Person page.
 7. The Person page displays on the Home page. Click the **Applications** tab.
 - a. The Applications page displays. Click the **Type** header once to group the applications alphabetically by benefit program.
 - b. NC FAST groups the applications by benefit program. Locate any application(s) with Type *Energy*. In that grouping, find the Energy application with the most recent Due Date then click the **Reference** number hyperlink associated with that application.
 8. The Energy Application displays on the Home page. Click the **Clients** tab.
 9. The Clients page displays. Compare the clients listed here to the composition of the household which is currently applying for Energy Assistance. Repeat steps 5-9 for each household member aged 18 years and older who might have previously applied for Energy Assistance in NC FAST. Next, move to step 9.a or 9.b below, depending on the results of the investigation.

Note: Performing an Energy Benefit search for each household member and examining the clients on the household member's most recent Energy application decreases the likelihood that an Energy worker will key an application which results in the household exceeding the fiscal year's maximum LIEAP/CIP benefit amount. For example, failing to follow this guidance could result in two different members in the same household receiving LIEAP benefits in the same fiscal year.

- a. When/if the Energy worker locates an application which includes the exact same household composition as the household applying for Energy Assistance:
 - i. Navigate to the Energy Income Support case associated with this application to begin the subsequent Energy application process. On the Energy application, click the **Related Cases** tab.
 - ii. The Related Cases page displays. Click the Energy Income Support case **Reference** number hyperlink.

Note: The Energy worker can also access the Energy Income Support case from Energy Benefit search results. Just locate the correct search result then click the hyperlinked **Case Reference number** associated with the person.

- iii. The Energy Income Support case displays. See the table below for further guidance.
- b. If the Energy worker cannot locate an application which includes the same household composition as the household applying for Energy Assistance:
 - i. Register any household members who are not registered. Consult the *Registering Persons* job aid for guidance.
 - ii. Navigate to the head of household's Person page to begin the new Energy application process. See the table below for further guidance.

APPLICATION PROCESS	WHEN TO USE	PATH IN NC FAST	RELEVANT JOB AID(S)
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NC FAST

North Carolina Families Accessing
Services through Technology

NEW	<ul style="list-style-type: none">• For the household's first Energy Assistance application in NC FAST• If household composition has changed since the household's last Energy application	On the head of household's Person page, click the Applications tab then click the New Application hyperlink.	<ul style="list-style-type: none">• <i>Energy – New Application Process (LIEAP)</i> job aid• <i>Energy – New Application Process (CIP)</i> job aid• <i>Energy – New Application Process (combined CIP and LIEAP)</i> job aid
SUBSEQUENT	The household's next Energy Assistance application if household composition has NOT changed from the previous application	On the Energy Income Support case, click the Tab Actions Menu then select Add Energy Application .	<i>Energy – Subsequent Application Process</i> job aid