

Energy – CIP & LIEAP Combined Application to Case

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Overview

This job aid outlines the steps to complete a Head of Household’s first Energy Assistance [Crisis Intervention Program (CIP) and Low-Income Energy Assistance Program (LIEAP)] application in NC FAST. Only one application is needed for non-Federal CIP funds and/or for Federal CIP funds; NC FAST is programmed to determine the funding source.

If this Head of Household:

- Is applying for the Low-Income Energy Assistance Program (LIEAP), follow the steps outlined in the *LIEAP Application to Case* job aid.
- Is applying for both CIP and LIEAP, refer to the *Combined CIP and LIEAP Application* web-based training (WBT).

- Has already applied in NC FAST for CIP, LIEAP, or both (i.e., has an Energy Income Support case), refer to the *Subsequent Energy Assistance Applications* job aid.

Notes:

- When a pledged payment is included in a payment request, the application associated with the pledged payment can no longer be edited or reassessed. Refer to the *Energy Payment Requests and Check Recording Process* job aid for guidance.
- Energy Assistance programs (CIP and LIEAP) use a customized application (Guided Interview) that is separate from the integrated application used for other benefit programs in NC FAST (e.g., FNS, Medicaid, CA, Subsidized Child Care Assistance, etc.). Therefore, only Energy Assistance can be included in an Energy Assistance application and only Eligibility workers can complete a separate, non-Energy application in NC FAST.
- The NC Rate Settlement fund can be used in conjunction with other CIP & non-federal CIP funds. These funds are ranked as higher priority over other non-federal CIP funds such as Share the Light.
- Households who have already received the maximum amount of \$600 for CIP, are eligible for an additional \$400 when additional Energy funds are available, for a total of up to \$1,000.
- When date of application changes for CIP when dual applications are submitted through ePASS, the CIP application will need to be rekeyed with the changed date of application based on the interview completion date.
- More than one Energy program application can be keyed when one is pending and not disposed. A new Energy program application can be keyed if it is not for the same Energy program that is already in submitted status.

Step-by-Step Instructions

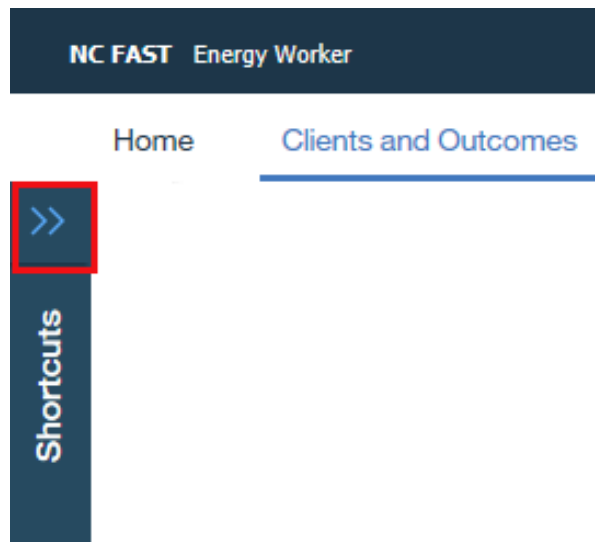
It is critical to perform a thorough person search in NC FAST for everyone included in the application. This will help prevent duplicate person registrations and incorrect eligibility determinations.

1. Search NC FAST for each household member to see if they are already registered in NC FAST. Refer to the *Searching for Persons* job aid.
2. If any household member is not registered in NC FAST, register them before continuing the application process. Refer to the *Registering Persons* job aid for detailed instructions.

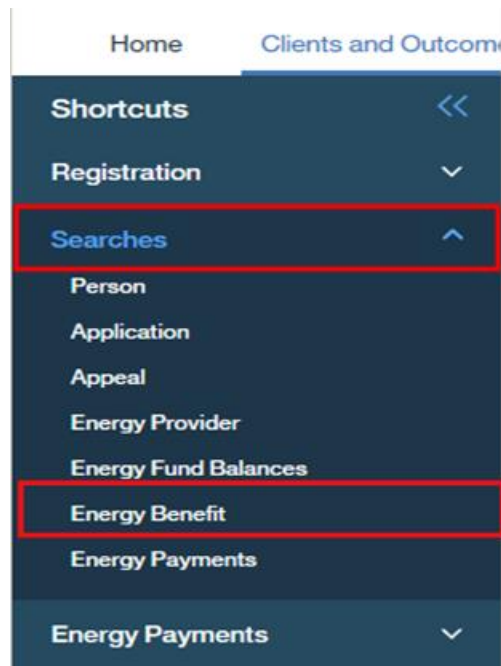
3. Review each household member's Person page for accuracy, whether they were previously registered. Update Person page information, as necessary.

Notes:

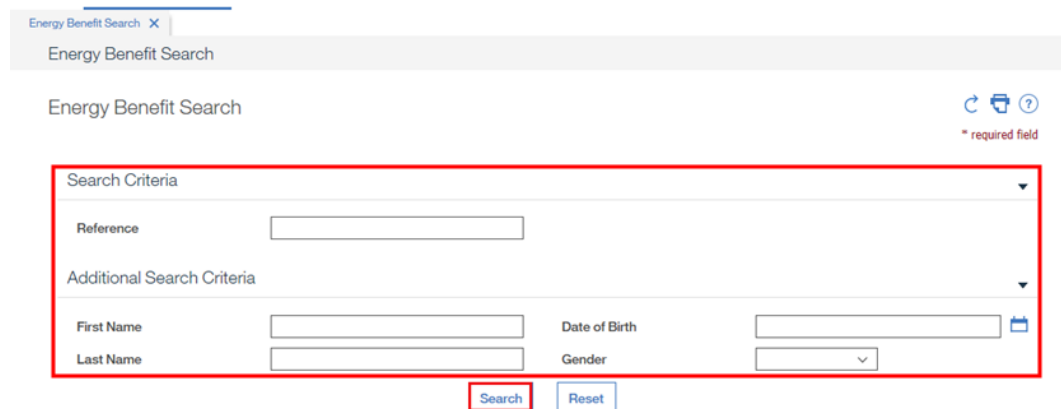
- Complete this step before starting any Energy application; Person page updates will not transfer to an in-progress Energy application. Refer to the *Editing Person Information* and *Adding Addresses* job aids.
 - Keep the Head of Household's Person page open. This is where an Energy worker begins the Head of Household's initial Energy application.
 - The latest information (Address, Phone Number, Date of Birth and Social Security Number) from Person Evidence will now be populated in application when an in-progress Energy application is resumed or while editing an already submitted application.
4. Perform an Energy Benefits Search to determine if the Head of Household previously received Energy Assistance benefits in NC FAST.
 - a. From the Clients and Outcomes tab, click the **toggle** to expand the Shortcuts panel.



- b. The Shortcuts panel expands. Click the **Searches** folder then select the **Energy Benefit** hyperlink.



- c. Enter the applicable search criteria for the Head of Household then click **Search**.



Energy Benefit Search X

Energy Benefit Search

Energy Benefit Search

Search Criteria

Reference

Additional Search Criteria

First Name Date of Birth

Last Name Gender

Search Reset

* required field

- d. The search results display. Click the **toggle** next to any result that has Yes in the Head of Household column. From here, the Energy worker can review information about Energy benefits received.

Energy Benefit Search

Energy Benefit Search

Time Remaining: 27:56* required field

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

Male

Search

Reset

Search Results: NC FAST

Person	Case Reference	Last Application Date	Head of Household	Address	Gender	Date of Birth
						

Notes:

- If the Head of Household column contains *Yes*, determine what type (and amount) of Energy assistance has been received. If the Head of Household column reads *Yes* and the client is still eligible for CIP benefits (whether in the current fiscal year or not), follow the guidance outlined in the *Subsequent Energy Assistance Applications* job aid (instead of using the steps outlined in this *CIP Application to Case* job aid).
- If the Head of Household column contains *No*, continue to step 5 below.
- To examine the existing Energy Income Support case in detail, click the **case reference number** hyperlink. The Energy Income Support case is displayed in a new tab. An Energy worker should begin any subsequent Energy Assistance application (whether for CIP or LIEAP) from this page, not from the Head of Household's Person page.

5. Begin this Head of Household's initial application.
 - a. Navigate to the Head of Household's Person page then click the **Applications** tab.
 - b. The Applications page displays. Click the **New Application** hyperlink.
 - c. The New Application pop-up appears. Select the **Crisis Intervention Program (CIP)** check box and the **Low-Income Energy Assistance Program** check box, then click **Next**.

Notes:

- Depending on the NC FAST user role, the radio button may have to be selected for Energy then click Next. Select the Crisis Intervention Program (CIP) check box and the Low-Income Energy Assistance Program check box.
- The application date for LIEAP appli

The Guided Interview

Step-by-Step Instructions

1. The Guided Interview is divided into several sections. Enter or select the applicable information on each page then click **Next**.

- a. About the Claimant Section:

Notes:

- An asterisk (*) indicates mandatory information. Some mandatory information (like Race and Ethnicity) is not always marked with an asterisk.
- If an Energy worker does not enter or select an answer to a mandatory question, clicking **Next** generates a validation message that lists the information that must be supplied to progress further.
- When the application progresses successfully to the next page, NC FAST automatically saves all information entered on the previous page. The Energy worker can select **Close** (at bottom left) at any time to end the Guided Interview. The next page allows the worker to choose whether to save the application and continue it later (*In-Progress* status) or quit/delete it.
- The Date of Interview field has been added for combined CIP & LIEAP applications.

Information About The Claimant

Application Details

Method of Receipt: *

--Please Select--

Application Date: *

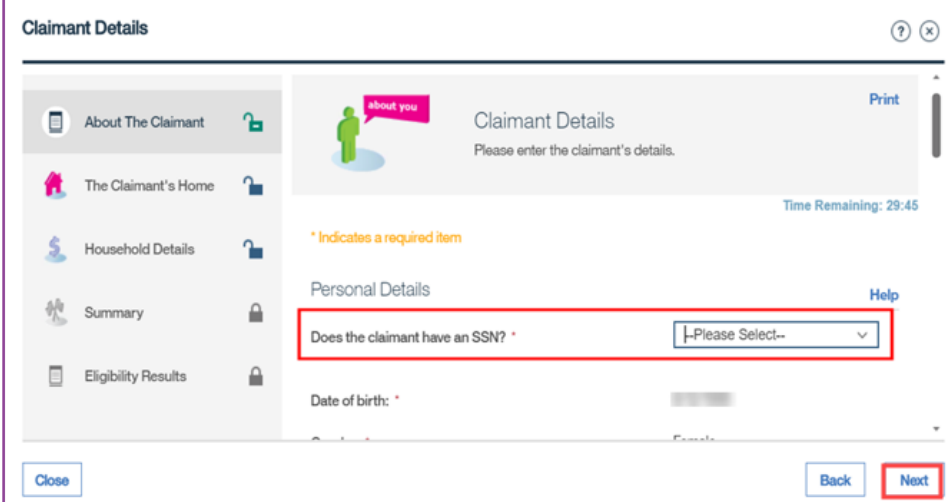
Date of Interview *

Close

Next

Notes:

- Does this person have an SSN? is a required field.
- Answer Yes if the Head of Household has an SSN. The Head of Household's SSN then appears in the field below (if SSN evidence has been added to the Head of Household's Person page).
- Answer No if the Head of Household (an Ineligible alien, for example) does not have an SSN. Select N/A for Has the claimant applied for an SSN? question that then appears.
- Answering Yes to Is this person disabled? will trigger NC FAST to apply the \$85 medical deduction (only if SSI is chosen as the client's Benefit income type later in the Guided Interview).
- Answering Yes to Has the claimant lived at this address for 12 months or longer? triggers NC FAST to ask questions later about all the household's Energy providers.
- If someone other than the Head of Household or a household member is applying for Energy Assistance on behalf of the household, select **Yes** for Is someone other than a household member applying for the household? then enter the representative's first and last names in the fields that appear.

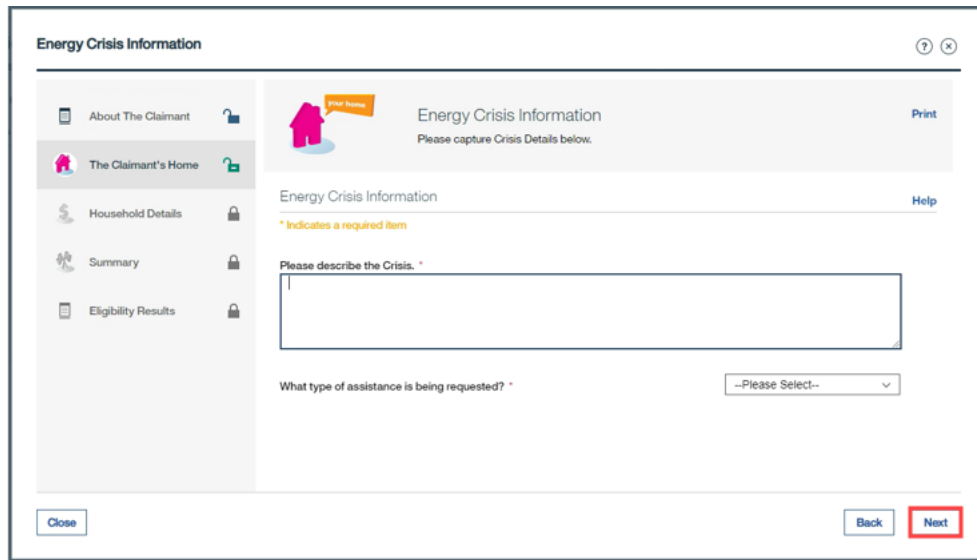


The Claimant's Home Section:

1. Enter the applicable Energy Crisis Information then click **Next**.

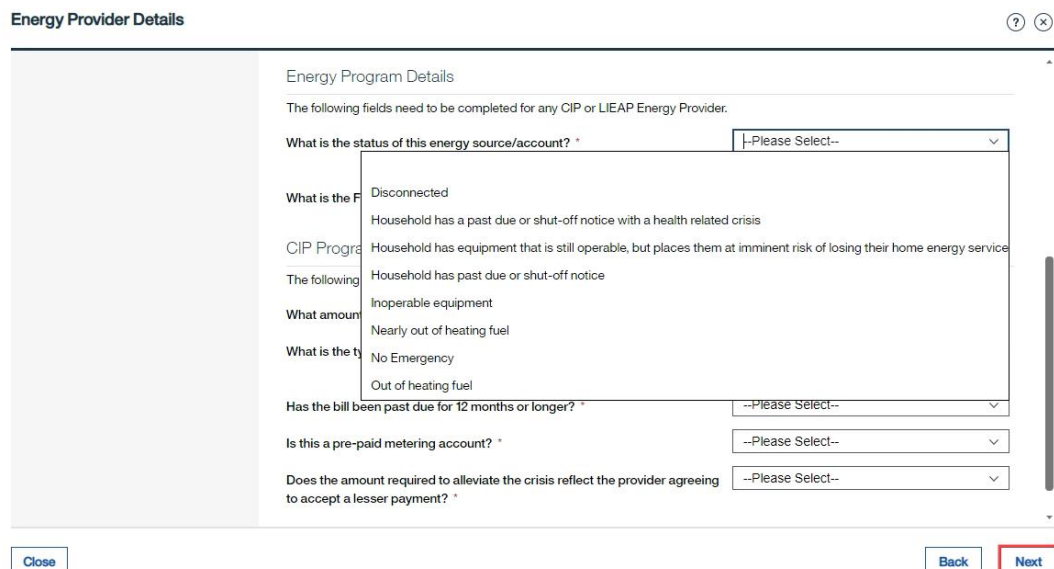
Notes:

- On the Energy Crisis Information page, describe the crisis (minimum of 20 characters).
- The application date for CIP applications submitted after 5:00 pm, **weekends** and **holidays** will be updated to the **next business day** in NC FAST.
- The "**Submitted Date**" Time on the Home screen will continue to display the actual date and time a CIP application is submitted. The "**Application Date**" on the Programs screen will display the "**Revised Application Date**" when a CIP application is submitted after 5:00 pm, on a **weekend**, or **holiday**.
- CIP applications can't be authorized *prior* to the *Revised Application* date.
- CIP application dates can't be changed to the same day of submission when submitted after 5:00 pm, on a **weekend**, or **holiday**.
- In the example below, the following question has been removed: Is the household facing a life threatening or health related emergency and is without a heating or cooling source or in danger of disconnection?



2. What is the status of this energy source/account?

Note: A new reason has been added to the question, What is the status of this energy source/account? The new reason is “Household has a past due or shut-off notice with a health-related crisis.”



3. Enter the applicable Energy Provider information then click **Next**.


Energy Provider Search

About The Claimant

The Claimant's Home

Household Details

Summary



Energy Provider Search

Please identify the household's energy providers.

Energy Provider Search

Please enter search criteria below and click next to perform the search.

Energy Provider Name *

Close

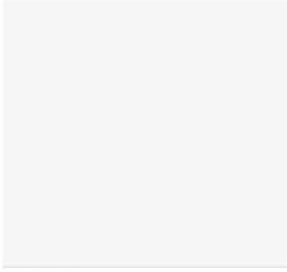
Back

Next

Notes:

- When the Energy worker enters a minimum of two consecutive characters found in an Energy provider's name (in the *Energy Provider Name* text field), any enrolled provider with those consecutive letters in its name appear in the search results. For example, entering "as" as part of the Energy Provider Name will return all results that include both gas and Washington in the provider's name.
- If an Energy provider does not appear in the search results, contact a supervisor, or lead worker for guidance. They enter and submit all county Energy providers with contracts to state-level personnel who approve or reject them. If a provider's status is not *Enrolled* (which means approved), that provider will not appear in search results.
- On the Select Energy Provider screen, a provider must be selected.
- Housing Status is mandatory for the application to be submitted. Select an applicable option from the drop-down menu.

Claimant Details ? x



Has the claimant been emancipated through a court order? --Please Select--

Housing Status: (select one) *

Voter Registration

If you are not registered to vote where you live now, would you like to apply to register to vote here today? IF YOU DO NOT ANSWER THE QUESTION, YOU WILL BE ASSIGNED TO THE STATE OF NORTH CAROLINA.

Close

Back **Next**

--Please Select--

Own

Rent with Utilities Billed Separately

Rent with Utilities included in rental fee



Other



4. Enter Energy Provider Details then click **Next**.



Notes:



- On the Energy Provider Details screen, the benefit amount cannot exceed the amount needed to alleviate the crisis.
- For the Energy Provider used for LIEAP, enter 0 as the amount needed to alleviate the crisis.
- On the Household Electric Vendor screen, select **Heating and Cooling** if the client has an electric vendor.


Energy Provider Details ? x

 About The Claimant 

 **The Claimant's Home** 

 Household Details 

 Summary 



Energy Provider Details Print

Please identify the details of this Energy Provider.

Energy Provider Details Help

* Indicates a required item

Provider Name Duke Energy 700 - Wake

Close

Back **Next**

- An authorized rep will be assigned to an application only if the Energy Provider is not registered with FIS.

- CHATHAM

Home

Enrollment Date	9/29/2023	End Date	
Preferred Language	English	Preferred Communication	Mail/Post
Service County	Chatham	Primary Category	Energy Vendor [View Types]

Payment Details

Location ID		Direct Deposit Status	
Currency	US Dollar	Authorized Rep Provider	Yes

- Yes, will be displayed on the Energy Provider screen for Authorized Rep Provider
- The system will recognize that the provider is not registered and will link it to the DSS County Office as the Authorized Rep.
- The approval notice will only display the non-registered provider and not the DSS County Office as the provider on the notice.

Household Details Section:

1. Enter Household Details then click **Next**.

Notes:

- NC FAST classifies some sources of income as Benefit Income instead of as Unearned Income. For example, SSI is Benefit Income, not Unearned Income.
- CIP requires current monthly amounts for this information.

Household Details

Household Details

Please tell us about the people in the claimant's home have income, expenses and resources

Household Details

* Indicates a required item

Does any one in the claimant's home have any income ? *

[-Please Select-]

Close

Back

Next

Summary Section:

1. Review the claimant's information, make edits if needed, then click **Next**.


Review The Claimant's Answers

About The Claimant

The Claimant's Home

Household Details

Summary



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
12/13/2018	In-Person	Edit

Close

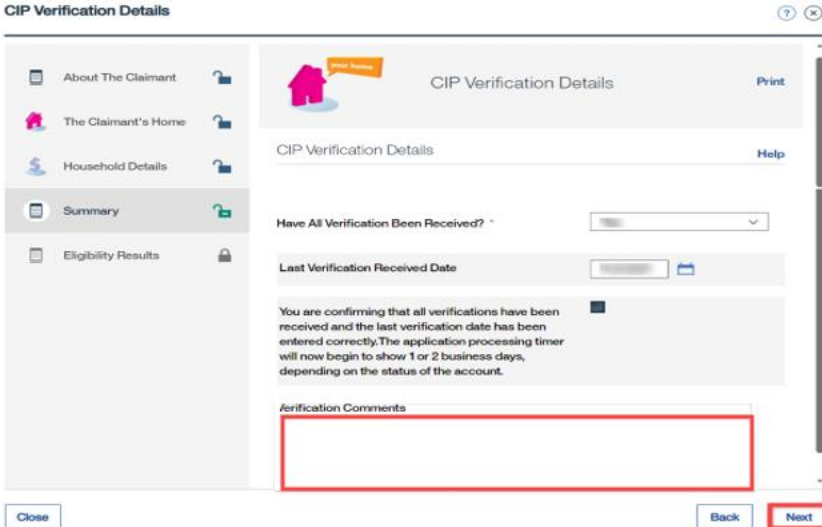
Back

Next

Notes:

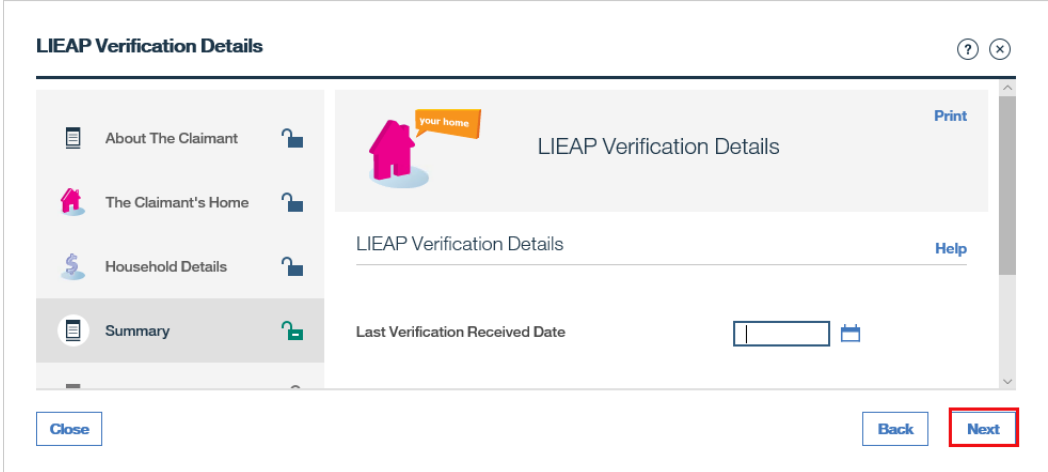
- The Review the Claimant's Answers page summarizes all information entered on the Guided Interview. Review this page thoroughly. Edit, delete, or add information as necessary on this page.
 - For CIP applications, if the heating source for the crisis is anything other than an electric provider, users must enter both an electric and non-electric heating provider. If assistance is not requested for the electric provider, enter a \$0 crisis amount for the electric provider and add the non-electric heating provider with the actual crisis amount. Example: Client is a Duke Energy Progress customer, but only needs assistance with LP gas at AmeriGas. The worker will add both energy providers to the application but enter a \$0 crisis amount for Duke Energy Progress. For AmeriGas, the worker will add the crisis amount that is needed to alleviate the crisis. When the worker authorizes the application, it should be approved for Share the Light funds depending upon fund availability.
- a. CIP Verifications Detail: Click the **Have All Verifications Been Received** drop-down menu then select the applicable option.
 - b. Select **No** when all verifications have not been received. Enter necessary Verification Comments then click **Next**.
- Note:** Guidance on how to Edit the CIP Verification Details can be found in the *Rights and Responsibilities Section, Step 9, iii-v*.
- c. 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**.

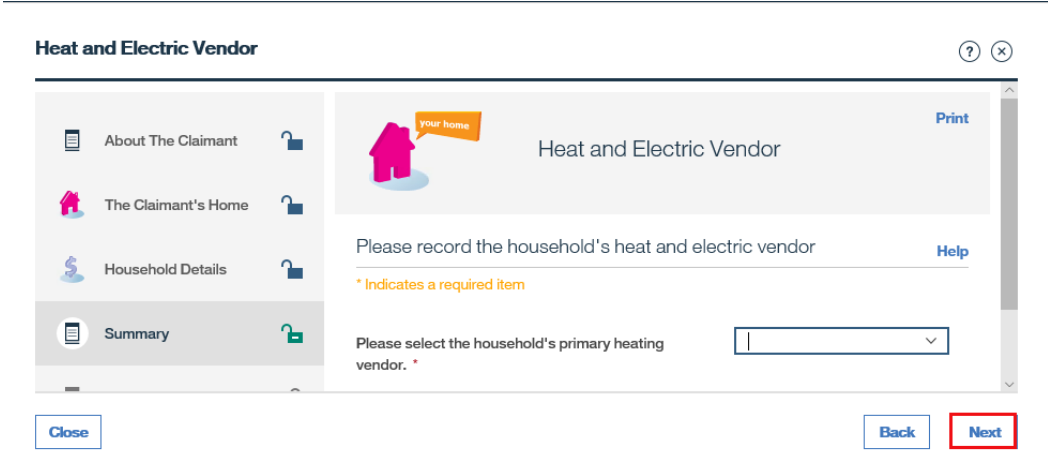


Note: The DSS-8185 date field has been added to the CIP application on the CIP Verification Details screen. Once DSS-8185 date is entered on CIP application, CIP timer should reset and add 2 additional Business Days from the date the DSS-8185 date is entered in **NC FAST**. **This is a mandatory field that requires selection.**

- d. Enter the LIEAP Verifications Details then click **Next**.



- e. Enter the Heat and Electric Vendor Information then click **Next**.



Eligibility Results Section:

Review all information to make certain the eligibility determination matches expectations.

1. Review the Eligibility Results for CIP then click **Next**.

Eligibility Results - CIP

About The Claimant
 The Claimant's Home
 Household Details
 Summary

Eligibility Results - CIP

Print

Eligibility Results - CIP

Head of Household	Jim Smith
Eligibility Decision	Eligible
Lumbee Household	No

Close

Back

Next

- Review the Eligibility Results for LIEAP then click **Next**.

Eligibility Results - LIEAP

About The Claimant
 The Claimant's Home
 Household Details
 Summary

Eligibility Results - LIEAP

Print

Eligibility Results - LIEAP

Head of Household	Jim Smith
Eligibility Decision	Not Eligible
Household already received LIEAP Benefit this Fiscal Year?	No

Close

Back

Next

Rights and Responsibilities Section:

- Select each **check box**.

Note: If needed, Energy workers can open the Client Rights and Responsibilities document (in either English or Spanish) and print it using the hyperlinks provided. Each opens in another window as a PDF document. Closing the PDF returns the Energy worker to the Guided Interview's Rights and Responsibilities page.

- Click **Submit**.

Application



* required field

Claimant's Rights and Responsibilities

[North Carolina Public Assistance Rights and Responsibilities](#)

[North Carolina Public Assistance Rights and Responsibilities - Spanish](#)

[Medical Transportation Assistance Notice of Rights and Responsibilities](#)

☐ Confirmed that claimant has read or been made aware of his/her rights and responsibilities. *

Management and Protection of Personal Health Information Policy

Cancel

Back

Submit

3. The Application tab on the Head of Household's Person page displays. Click the **reference number** hyperlink for this application.

Note: The application Status must be *Submitted* for the Reference number to become a hyperlink. Click the **refresh** icon to update the application Status to *Submitted*.

4. The Energy Application home page displays. Click the **Clients** tab to confirm that NC FAST has matched all household member information entered on the Energy application with information (name, SSN, date of birth) that appears on each household member's Person page:

Note: A list of household members included on this application is displayed. A status of *No* in the Registered column indicates that the person's name, date of birth, and/or SSN entered on the application does not match these same details on their Person pages.

5. For each household member with *No* in this column, click the **List Actions Menu** then select **Match Client**. Refer to the *Match Client* job aid for guidance on completing the Match Client process.
6. After successfully completing the Match Client process, *Yes* should now appear in the Registered column for every household member.

Note: NC FAST automatically matches name, SSN, and date of birth (Status = *Yes*) if what is entered on an application matches this same information on the Person page.

7. Click the **Online Data** 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. Make a note of any OVS results that do not match the details recorded during the Guided Interview.
8. Click the **FNS & Work First** tab to view any income, resources, and/or expenses used to determine a household member's eligibility for active Food & Nutrition Services (FNS) or Work First/Cash Assistance cases. Note any details that affect the household's Energy Assistance application.
9. If either OVS results or information found on the FNS & Work First tab indicate that evidence or verification sources need to be edited/updated on the Guided Interview:
 - a. Click the **Tab Actions Menu** then select **Edit Application Information**.
 - b. The Summary 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:

 - i. Update information, as necessary.
 - ii. Change the verification method, if necessary.
 - iii. Select **Yes** when all verifications have been received.
 - iv. Enter the Last Verification Received Date.
 - v. Select the **You are confirming that all verifications have been received and the last verification date has been entered correctly** check box. The application timer will now begin to show 1 or 2 business days, depending on the status of the account.

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

 - vi. Click **Next** to return to the Summary page.
 - vii. Repeat steps 9.b.i-iii as often as necessary to record OVS results.
 - viii. Click **Next**.
 - c. The Eligibility Results page displays. Review eligibility results, then click **Next** if satisfied with the results.

Note: Clicking **Back** returns to the Summary page.

- d. The Update Application pop-up appears. Click **Confirm**.
- 10. Print the Application signature page and capture client signature.

- a. On the Energy Application page, click the **Contact** tab.
- b. The Contact page displays. Click the **Attachments** folder.
- c. The Attachments page displays. Click the applicable application **toggle**.

Note: If more than one Application PDF appears, click the **toggle** next to each Application PDF to compare the day/times in the name hyperlink to ensure the most recent application is selected and printed.

- d. Click the **Application PDF Name** (displayed as *date time_application.pdf* or *mm/dd/yyyy HH:mm:ss_Application.pdf*) hyperlink to download the Energy Application pdf file.
- e. Open the downloaded file and print the Application PDF signature page.

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 it must be opened manually).

- f. Obtain client's signature on the Application PDF signature page.

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

- g. Copy the Application PDF signature page and give the client a copy as proof that they have completed an Energy application.

- 11. Close the Application PDF.

- 12. The Energy Application page displays. Authorize, deny, or withdraw from each program.

Note: Both CIP and LIEAP must have a non-pending disposition (approved, denied, or withdrawn) to dispose of the Energy application. Both programs can be approved individually or simultaneously. Each program can only be denied or withdrawn individually.

- a. To authorize the application:
 - i. Click the **Tab Actions Menu** then select **Authorize Program**.
 - ii. The Authorize Program pop-up appears. Select the **check box** next to each applicable program then click **Authorize**.

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.”

To deny a program:

1. Click the **Contacts** tab.
2. The Contact page displays. Click **New**.
3. The New Note pop-up appears. Enter a subject and case notes to substantiate denying the application then click **Save**.

Note: Case notes can only be added to an Energy Application before the application is disposed.

4. The Contact page appears. Click the **Programs** tab.
5. The Programs page appears. Click the **List Actions Menu** next to the applicable program then select **Deny**.
6. The Deny Program Request pop-up appears. Click the **Denial Reason** drop-down menu then select the applicable reason.

Note: The denial reason "Eligible but there are not funds available," is now available in the drop-down menu when the applicant is eligible but, there are no funds available.

7. Add comments then click **Save**.
8. The Programs tab appears.

To withdraw a program:

1. Click the **Contacts** tab.
2. The Contact page displays. Click **New**.
3. The New Note pop-up appears. Enter a subject and case notes to substantiate denying the application then click **Save**.

Note: Case notes can only be added to an Energy Application before the application is disposed.

4. The Contact page appears. Click the **Programs** tab.
5. The Programs page appears. Click the **List Actions Menu** next to the applicable program then select **Withdraw**.

6. Enter the required information and comments then click **Save**.
7. The Programs page appears.
8. Print the approval or denial notice:
 - a. On the Energy Application, click the **Contact** tab.

Note: The approval/denial notice is also located on the Head of Household's Person page (Contact tab → Communication folder).
9. The Contact page displays. Click the **Communications** folder.
10. The Communications page displays. Click the **List Actions Menu** next to the notice then select **View/Print**.

Note: The approval or 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).
11. Check the application for accuracy. Print then close the PDF file.
12. The Contacts page on the Energy Application displays. To update the notice's status from *Draft* to *Sent*.
 - a. Click the **List Actions Menu** then select **Edit**.
 - b. The Edit Pro Forma Communication pop-up appears. Click the **Communication Status** drop-down menu then Select **Sent**.

Note: *Sent* status indicates that the notice has been given to the client manually. Notices will not be mailed to clients via Central Print.
 - c. Click **Save**.
13. View the Pledged Payment Status:
 - a. Navigate to the Energy Application page. Click the **Programs** tab.
 - i. Click the **toggle** next to the applicable Program to review details.
14. Add case notes:
 - a. Click the **Related Cases** tab.
15. The Related Cases page displays. Click the **reference number** hyperlink.
16. The Energy Income Support Case displays. Click the **Case Details** tab.
17. The Case Details page displays. Click **New**.

18. The New Note pop-up appears. Enter and select the applicable information then click **Save**.
19. The Energy Income Support page displays.

When a change is required for one application:

The Energy Worker role is not able to edit an application with both CIP and LIEAP programs if there is one program payment in processed status. Supervisor roles at the county level and Case Maintenance Worker roles at the state level can edit dual applications for CIP and LIEAP

In scenarios where workers with eligibility roles need to edit the CIP or LIEAP application to make changes to the crisis amount and/or income amount, and the CIP or LIEAP application payment is processed, users with supervisor or state level Case Maintenance Worker role will need to edit the application. Changes to income could result in overpayment or underpayment, which can only be handled at the county level by a supervisor.

In scenarios where worker roles need to edit the CIP or LIEAP application to make changes to crisis amount and/or income amount, and the CIP or LIEAP application payment is submitted, not processed, a supervisor will need to remove the CIP or LIEAP application line item from the associated payment request.