

# Phase I – Student Guide

## Table of Contents

<b>Module 1- Introduction &amp; Review of the Course .....</b>	<b>4</b>
<b>History of DSS .....</b>	<b>4</b>
<b>Congress .....</b>	<b>5</b>
<b>The State Government’s Role .....</b>	<b>5</b>
<b>The General Assembly .....</b>	<b>5</b>
<b>The County’s Role .....</b>	<b>6</b>
<b>County Organization and Governance .....</b>	<b>6</b>
<b>CRC Pre-Assessment .....</b>	<b>6</b>
<b>What is ACT WorkKeys? .....</b>	<b>6</b>
<b>Certificate .....</b>	<b>8</b>
<b>Technology Awareness .....</b>	<b>8</b>
<b>Keyboarding .....</b>	<b>9</b>
<b>Module 2 – Introduction to NC FAST/ePASS/Salesforce .....</b>	<b>11</b>
<b>DSS &amp; NC FAST Terminology .....</b>	<b>11</b>
<b>Core Functions .....</b>	<b>11</b>
<b>Introduction to NC FAST/ePASS/Salesforce .....</b>	<b>13</b>
<b>Work Queues .....</b>	<b>14</b>
<b>Getting Tasks from Work Queues .....</b>	<b>14</b>
<b>Navigation 101 .....</b>	<b>16</b>
<b>NC FAST HELP/Job Aids .....</b>	<b>16</b>
<b>Module 3 - Customer Service .....</b>	<b>16</b>
<b>Assessment .....</b>	<b>16</b>
<b>Customer Service .....</b>	<b>16</b>
<b>What Is Customer Service? .....</b>	<b>17</b>
<b>Importance of Customer Service .....</b>	<b>17</b>
<b>Activities .....</b>	<b>17</b>
<b>Interviewing Clients .....</b>	<b>18</b>
<b>Guided &amp; Effective Interview .....</b>	<b>18</b>
<b>The Purpose of an Effective Interview .....</b>	<b>18</b>
<b>Client Interaction .....</b>	<b>18</b>

Key Points to remember while interacting with clients .....	19
Techniques for Effective Questioning .....	19
Advantages Open-Ended Questions .....	19
Examples of Open-Ended Questions? .....	19
Advantages of Closed-Ended Questions .....	19
Examples of Closed-Ended Questions?.....	20
When Should I Conduct an Interview? .....	20
Adding Documents/Uploads/Documentation.....	20
Soft Skills .....	20
Important Caseworker Skills:.....	21
Who is responsible for what? .....	21
Organization in the Workplace .....	22
Conflict Resolution .....	22
Module 4 – Introduction to Energy .....	22
Assessments.....	22
Introduction to Energy Assistance Program .....	23
What is LIEAP? .....	23
What is CIP? .....	23
Income Base Period .....	23
What is the Energy Provider Portal?.....	24
Searching for Persons .....	24
Registering Person .....	24
Person Page Clean Up .....	24
Energy Benefits Search.....	25
Modules 5 & 6 – Energy .....	27
Keying Applications.....	27
Job aids .....	28
Match Clients in NC FAST .....	28
Processing and Determinations .....	28
OVS   The Work Number   SAVE .....	28
Forms/Notices .....	29
Timeframes .....	29
Income Support Navigation .....	29

<b>Documentation .....</b>	<b>30</b>
<b>Module 7 – Energy Review &amp; Assessment.....</b>	<b>30</b>
<b>Assessments.....</b>	<b>31</b>
<b>Module 8 – Job Search   Career Counseling.....</b>	<b>31</b>
<b>Job Search/Career Counseling .....</b>	<b>31</b>
<b>Types of Resumes .....</b>	<b>31</b>
<b>Completing a Job Application .....</b>	<b>32</b>
<b>Job Interviews .....</b>	<b>32</b>
<b>Workplace Success.....</b>	<b>33</b>
<b>Module 9 – Introduction to Food &amp; Nutrition Services (FNS) .....</b>	<b>33</b>
<b>Searching for Persons &amp; Registering a Person Review.....</b>	<b>33</b>
<b>Food and Nutrition Services (FNS) Program .....</b>	<b>33</b>
<b>History of FNS .....</b>	<b>34</b>
<b>Food &amp; Nutrition Services Applications .....</b>	<b>34</b>
<b>Eligibility Requirements .....</b>	<b>34</b>
<b>Household Composition Requirement .....</b>	<b>35</b>
<b>Work Registration Requirements.....</b>	<b>35</b>
<b>Mandatory Verification .....</b>	<b>36</b>
<b>OVS   The Work Number   SAVE.....</b>	<b>36</b>
<b>Module 10 – Keying FNS Applications – Application to Case.....</b>	<b>36</b>
<b>Steps to Start the Application Process .....</b>	<b>36</b>
<b>Job aids .....</b>	<b>37</b>
<b>Match Clients in NC FAST .....</b>	<b>38</b>
<b>Evidence Dashboard .....</b>	<b>38</b>
<b>Managing Evidence on the Dashboard.....</b>	<b>39</b>
<b>Processing and Determinations .....</b>	<b>39</b>
<b>Forms/Notices .....</b>	<b>40</b>
<b>Income Support Navigation &amp; Documentation.....</b>	<b>40</b>
<b>Modules 11-13 – Food &amp; Nutrition Services .....</b>	<b>40</b>
<b>Modules 14 – Food &amp; Nutrition Services Review &amp; Other Topics .....</b>	<b>40</b>
<b>Other Topics.....</b>	<b>41</b>
<b>Able Bodied Adults without Dependents (ABAWD) .....</b>	<b>41</b>
<b>Expedites.....</b>	<b>42</b>

<b>Overview of the Supplemental Nutrition Assistance Program (SNAP)</b> .....	42
<b>Modules 15 – FNS Assessment</b> .....	43
<b>Final Checklist:</b> .....	43
<b>Cited Sources</b> .....	44

## Module 1- Introduction & Review of the Course

Welcome to Phase I HRD 4000 Career Readiness/Pathways – Introduction to Human Services: DSS Income Maintenance Caseworker.

This course is \_\_\_\_\_ hours in length. It will cover skills and strategies designed to provide employability skills training and career exploration for the role of Income Maintenance Caseworker within Division of Social Service agencies.

Upon completion of the course, the student will demonstrate an understanding and/or proficiency in the following:

- entry-level skills required to be an employee of DSS
- basic computer and keyboarding skills
- interviewing skills and resumes
- workplace success skills
- customer service skills
- DSS and NC FAST terminology
- basic navigation skills in the NC FAST system

This is a non-credit course, and assessments will be utilized to verify a student's readiness to progress to Phase II of the program based on demonstrated skills, assessment scores, and participation in class activities. This is a pass/fail course based upon successful completion of course assessments and attaining the Career Readiness Certificate. Students must attend, at minimum, \_\_\_\_\_% of class hours and actively participate in class activities in order to successfully complete the class and receive a certificate.

### History of DSS

The North Carolina Department of Health and Human Services (NCDHHS) has its origins in the North Carolina Department of Human Resources (DHR), which was created in 1971. The DHR was created to consolidate over 300 state agencies into one umbrella organization. The DHHS has since expanded to include other state agencies and departments, such as the Department of Public Welfare, Department of Public Health, and Department of Mental Health. The Division of Vocational Rehabilitation was added in 1973, the Office of Rural Health in \_\_\_\_\_, and the Division of Aging in \_\_\_\_\_.

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### **Congress**

Significant parts of the social services system in North Carolina still reflect the programs created by the Social Security Act in \_\_\_\_\_, and the system has evolved based largely on changes in the Social Security Act.

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### **The State Government's Role**

In most states, the state, rather than local government, administers social services programs. In North Carolina, however, most social services programs are administered by counties under the state's supervision. State direction and supervision come from the General Assembly, the state Department of Health and Human Services (DHHS), and the appointed rulemaking commissions.

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### **The General Assembly**

Since enacting laws in \_\_\_\_\_ to enable North Carolina to participate in federally funded welfare programs, the General Assembly has amended or rewritten those laws many times to establish new programs, conform state law to federal changes, modify program features that federal law leaves to the state to determine, and establish or modify programs based solely on state law.

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### The County's Role

As mentioned above, North Carolina is somewhat unusual because most social services programs are not administered directly by the state but rather by counties under the state's supervision. North Carolina's county-administered, state-supervised social services system reflects the state's long history of local (county) responsibility for public social services, the strength of county government in the state, and the role of North Carolina's counties as the primary vehicle for the delivery of basic services to citizens.

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### County Organization and Governance

Since \_\_\_\_\_ the organization and governance of North Carolina's local social services agencies has been changing rather quickly.

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### CRC Pre-Assessment

#### What is ACT WorkKeys?

Utilize the following video to explain what ACT WorkKeys is, all about.

**ACT WorkKeys – What's It All About** <https://youtu.be/MjSao9ZVG5Q?si=nqyL9zuKsecgLctn>

**Nationally recognized solutions for identifying, certifying, and strengthening core workplace skills.**

ACT® WorkKeys® is a **system of assessments, curriculum and skills profiling** that determine, build, and measure essential workplace skills that can affect your job performance and increase opportunities for career changes and advancement.

Developed with the same knowledge and research expertise responsible for the ACT® test, WorkKeys assessments and training help lead individuals and businesses to success.

The **Career Readiness Certificate (CRC)** is a credential that gives job seekers and employers a measure of workplace skills. It is being used by job seekers across the country as an employment credential, and by employers as an assessment of a person's trainable ability for an entry-level job or for a promotion within the company.

ACT WorkKeys Assessments

## **WorkKeys Assessments are Relevant**

Developed to solve actual workplace problems.

Unlike other assessments, they don't simply give an indication of reading and writing competency. Instead, they measure a range of hard and soft skills relevant to any occupation, at any level, and across industries.

## **WorkKeys Assessments are Recognized**

Successful completion of WorkKeys core assessments can lead to earning an [ACT WorkKeys® National Career Readiness Certificate™](#) (ACT WorkKeys NCRC®)—a credential that verifies the skills found to be most essential across industries and occupations.

## **WorkKeys Assessments Validate Competencies**

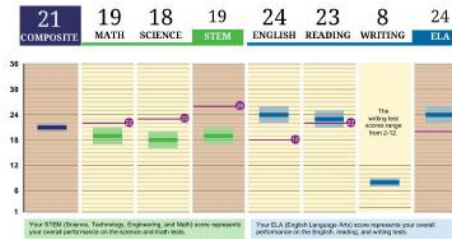
- **Essential Skills**
- **Applied Math**
- **Graphic Literacy**
- **Workplace Documents**
- **Applied Technology**
- **Business Writing**
- **Workplace Observation**
- **Talent**
- **Fit**

**Example of Scorecard:**

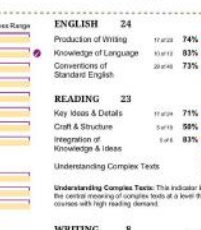
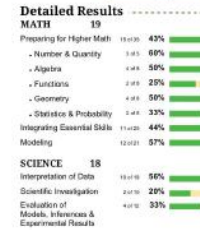
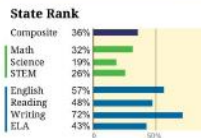
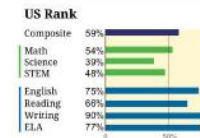


ANN C TAYLOR (ACT ID: 20129212)  
WHEAT RIDGE SENIOR HIGH SCHOOL (061-450)  
TEST DATE: APRIL 2022

the ACT  
Student Report



**Your Score**  
Score Range  
ACT College Readiness Benchmarks  
**Readiness Benchmark**  
If your score is at or above the Benchmark, you have at least a 50% chance of obtaining a B or higher in a typical first-year college course in the corresponding subject area. There is currently no Benchmark for writing.  
**Your Score Range**  
Test scores are estimates of your educational development. Think of your test achievement on this test as being within a range that extends about one standard error of measurement, or about 1 point for the Composite and writing scores, and 2 points for English, ELA, and the other test scores, above and below your score.



**ACT Composite Score:** ACT Math, Science, English, and Reading test scores and the Composite score range from 1 to 36. For each test, we converted your number of correct answers into a score within that range. Your Composite score is the average of your scores on the four subjects rounded to the nearest whole number. If you left any test completely blank, that score is reported as test status and no Composite score is computed.  
**ACT Readiness Range:** The range shows where a student who has met the ACT College Readiness benchmark on the subject test would typically perform.

**Writing 8**  
If you took the writing test, your essay was scored on a scale of 1 to 6 by two raters in each of the four writing domains. These domains represent essential skills and abilities that are necessary to meet the writing demands of college and career. Your domain scores, ranging from 1 to 6, are an off-the-test "raw" score. Your writing score is the average of your four domain scores rounded to the nearest whole number. To learn more about your writing score, visit [www.act.org/the-act-writing-score](http://www.act.org/the-act-writing-score).

## Sending Your Scores

A score report (including your photo) was automatically sent to the high school you reported when registration was completed for the test. Your school will use the information for counseling, evaluating the effectiveness of instruction, and planning changes and improvements in the curriculum.  
At your direction, your scores from this test date are also being reported to the colleges shown. (Be aware that when you send a report to a college that is part of a school system, the college may share your score with other colleges in that system.) Institutions use your test scores, along with high school grades, academic preparation, future plans, and other factors to help identify applicants who can benefit most from their programs. In addition, colleges can use results on the ACT to assist scholarship agencies in identifying qualified candidates, place students in first-year courses, and help students develop an appropriate program of study.  
If you selected a college code incorrectly or forgot to include one, don't worry! You can still send scores to other colleges. Visit [www.act.org/the-act-scores](http://www.act.org/the-act-scores) to explore student resources or to order additional score reports.

- AUBURN UNIVERSITY  
[www.auburn.edu](http://www.auburn.edu)
- ADAMS STATE UNIVERSITY  
[www.adams.edu](http://www.adams.edu)
- CAPITAL COMMUNITY COLLEGE  
[www.actcommunity.edu](http://www.actcommunity.edu)
- MITCHELL COLLEGE  
[www.mitchell.edu](http://www.mitchell.edu)

## College and Career Planning

Not sure what direction you want to take with your education or career? Don't know where to go? Looking for educational and career goals can help you succeed in college and find satisfying work. Setting goals and making plans involves getting answers to the questions that matter most to you.

We can help to help. Visit [www.act.org/collegeplanning](http://www.act.org/collegeplanning) for personalized information on education and career options. There are hundreds of occupations and majors. How do you choose? It helps to have options that are based on what matters to you. For example, all occupations differ in their involvement with four basic work tasks: working with Data, Ideas, People, and Things.



By examining your strengths, interests, and work values in these four areas, ACT can help you discover occupations that fit you best.

Go to [www.act.org/collegeplanning](http://www.act.org/collegeplanning) and find answers to questions you may be asking now:

- How do I get started with college and career planning?
- Which occupations will allow me to use my strengths and do the kinds of work I enjoy?
- Which majors will provide me with a path to achieving my career goals?
- Do the colleges I am considering offer majors I am interested in?

## Progress Toward the ACT National Career Readiness Certificate®

This indicator provides an estimate of the ACT National Career Readiness Certificate (ACT NCRC) that students with your ACT Composite score are likely to obtain. The ACT NCRC is an assessment-based credential that documents foundational work skills important for job success across industries and occupations. Visit [www.act.org/ncrc-indicator](http://www.act.org/ncrc-indicator) to learn more.



Students with this ACT Composite score are likely to obtain a Silver level NCRC.

## Where Are You Going?

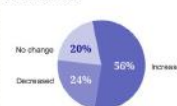
Visit [www.act.org/collegeplanning](http://www.act.org/collegeplanning) to learn more about yourself and find out about careers, majors, and colleges that may be right for you. It's free!

## Retesting with the ACT

Consider retesting if one or more of the following applies to you:

- Do you feel that your scores should be higher than those received?
- Did you have any problems during the tests, like misunderstanding the directions or feeling ill?
- Have you taken more coursework or an intensive review in the areas covered?
- Do you want to apply to a college that requires or recommends the writing test?

## Typical Composite Score on a Retest



Go to [www.act.org/the-act-taking](http://www.act.org/the-act-taking) for more information.

**Test Security Hotline**  
If you have concerns about the security of the tests, please report them at [www.act.ethicspoint.com](http://www.act.ethicspoint.com) or (855) 382 2545.

## Certificate

Once all levels of the test have been completed and the score is obtained you will receive a certificate that highlights each individual level.



## Technology Awareness

With the rise of digital technology and an increased need for technologically proficient people in almost any field, learning technology skills is very important.



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## Keyboarding

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### Common Symbols Used:

Period (.): Sentence ending, abbreviation marker.

Comma (,): Separates words or clauses within a sentence.

Semicolon (;): Stronger separation than a comma, often used between independent clauses.

Colon (:): Introduces a list, explanation, or quotation.

Question mark (?): Denotes a question.

Exclamation mark (!): Denotes emphasis, excitement, or strong emotion.

### Other Common Symbols:

@: Used in email addresses and mentions on social media.

#: Used for hashtags on social media, sometimes for numbering.

\$: Currency symbol, often used in online transactions.

%: Percentage symbol.

&: Ampersand, used in abbreviations and to join words.

\*: Asterisk, used for bullet points, multiplication, or wildcards.

-: Hyphen, used to connect words or numbers.

\_: Underscore, used in filenames and formatting.

=: Equal sign, used in equations and comparisons.

+: Plus sign, used in math and sometimes for lists.

/: Forward slash, used for division, URLs, and date separators.

: Backslash, used for file paths and escape characters.

~: Tilde, used for diacritics, accents, and sometimes as a negation symbol.

^: Caret, used for superscripts, exponentiation, and keyboard shortcuts.

`: Backtick, used for code formatting and inline code blocks.

": Double quote, used for quotations and dialog.

': Single quote, used for contractions and nested quotes.

(): Parentheses, used for grouping terms or explanations.

[]: Brackets, used for additional information or clarification.

{}: Curly braces, used for grouping code blocks or complex expressions.

<>: Angle brackets, used for HTML tags and sometimes for comparisons.

### **Navigation and Editing:**

Arrow keys (↑, ↓, ←, →): Move the cursor or scroll in certain directions.

Home/End: Move the cursor to the beginning or end of a line or document.

Page Up/Page Down: Scroll up or down a page.

Delete/Backspace: Delete characters to the right or left, respectively.

Enter/Return: Create a new line or submit a form.

Tab: Insert spaces or indent text.

Caps Lock: Toggle between uppercase and lowercase letters.

Shift: Hold to type uppercase letters or use special symbol functions.

Ctrl (control): Used in combination with other keys for advanced functions or shortcuts.

Alt (alternate): Used in combination with other keys for alternative functions or shortcuts.

Utilize any of the following websites to practice keyboarding:

<http://www.learntotype.com>

<http://www.gcflearnfree.org/typing/typing/1/>

<http://www.freetypinggame.net>

***NOTE:*** In future modules your knowledge will be assessed in the following areas:

- DSS & NC FAST Terminology,
- Keyboarding,
- Career Readiness Certification, &
- Core Functions

*Take time outside of class to familiarize and study in these areas of study.*

## **Module 2 – Introduction to NC FAST/ePASS/Salesforce DSS & NC FAST Terminology**

See attached documents to review and study.

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### **Core Functions**

#### **Introduction:**

North Carolina Session Law 2017-57, Section 11H.(g) and (i), directs the Department of Health and Human Services (DHHS) to create a comprehensive training and certification program for caseworkers who utilize the North Carolina Families Accessing Services Through Technology (NC FAST) system to input data or make eligibility determinations for State programs. The NC FAST system was developed to improve benefit determinations for a spectrum of State programs administered by the 100 county departments of social services, including Food and Nutrition Services (FNS), Medicaid, Work First, and the Child Care Subsidy program.

Workers will be tested on the following knowledge, skills, and abilities:

- Understand and identify the required Person Searches.
- Understand the Person Registration Process.
- Identify the difference between CNDS, NC FAST, and Prospects Person.
- Identify the four different pages of NC FAST.
- Demonstrate the ability to Manage Person Page evidence.
- Identify Duplicate person registrations.
- Understand case statuses.
- Navigate to the Care & Protection tab, and how to determine case status.
- Understand how to locate a sanction.
- Ability to navigate to Task location, understand what they mean, and if assigned or not.
- Basic understanding of Reports.
- Knowledge of FAST Help location, how to maneuver through the various documents.

## Overview of Existing Training Modules:

Category Name	Course Name	Name of Activity	Duration (in hours)
Energy Assistance	EA NC FAST Core Functions	NC FAST Basic Navigation for Energy Workers WBT	0.5
		FAST Help Overview narrated presentation	0.5
		Person Search and Registration Parts 1 & 2	1
	EA Applications	Initial CIP Application (5 parts)	1.07
		Sub CIP Application (4 parts)	1.33
		Initial LIEAP Application (2 parts)	0.45
		Sub LIEAP Application (pending development)	0
	EA Provider Management	Energy Provider Management Webinar	0.28
	EA Creating Payment Requests/Processing Payments	Energy Payment Requests and Check Recording Process Webinar	0.12
	EA Supervisor Bootcamp	Supervisor Energy Bootcamp (9 parts)	1.76
Total est. time (in hours)			<b>7.01</b>
FNS/CA	FNS/CA Applications	FNS/CA Webinar (8 parts)	2.05
	Employment & Training Referral Process	E&T Webinar	0.17
Total est. time (in hours)			<b>2.22</b>
Medicaid - FCMA	MAGI	MAGI Webinar (10 parts)	1.85
Total est. time (in hours)			<b>1.85</b>

As a student, please provide your instructor with the following information as soon as possible to gain access to the NC FAST Learning Gateway:

- First Name
- Last Name
- Community College Email Address (only community college email addresses are acceptable due to security reasons)

The following assessments should be completed during the specified phases in a timely manner:

### Phase I:

- Core Functions
- Energy Assistance/EA Applications Level 1

**Phase II:**

- FNS/CA Applications Level 1
- Medicaid – FCMA/MAGI Level 1

Please ensure this information is submitted promptly to facilitate your access and timely completion of the assessments.

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**Introduction to NC FAST/ePASS/Salesforce**

NC FAST - North Carolina Families Accessing Services through Technology (NC FAST) is a program that aims to improve how the North Carolina Department of Health and Human Services (NCDHHS) and county departments of social services operate. The program uses new technological tools and business processes to help staff spend less time on administrative tasks and more time helping families.

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ePASS - a is a secure, web-based, self-service tool that enables North Carolinians to screen for potential eligibility for a range of NC benefits and services programs. For NC residents, ePASS shows the range of programs for which they may be eligible; provides them with information they need to make an informed decision about pursuing program assistance; and simplifies the process to encourage their participation.

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Salesforce - is a core technology platform used by the North Carolina Department of Health and Human Services (NCDHHS). Deloitte is working with the NCDHHS to customize Salesforce's "Accelerators" to meet the state's needs. The platform will be user-friendly, mobile-friendly, and integration-friendly, and will include a mobile app with offline sync

capabilities. This will allow child welfare staff to complete work in the field even when they don't have internet access.

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## Work Queues

Work queues were originally set up by the NC FAST project team. The work queue administrator is set to be the lead system administrator in the county. Counties can choose to leave this assignment as it is or can elect to designate a supervisor in the county to have this responsibility.

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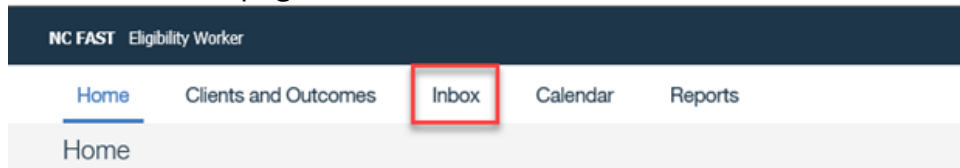
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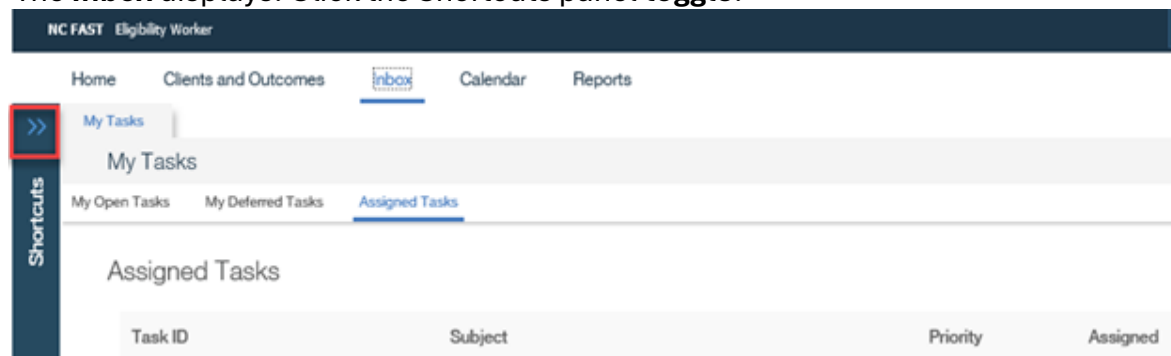
## Getting Tasks from Work Queues

### Step-by-Step Instructions

1. On the NC FAST page, click the **Inbox** tab.



2. The **Inbox** displays. Click the Shortcuts panel **toggle**.



3. The Shortcuts panel expands. Click the **Work Queues** folder.

NC FAST Eligibility Worker

Home Clients and Outcomes **Inbox** Calendar Reports

Shortcuts <<

Tasks >

My Tasks

My Open Tasks My Deferred Tasks **Assigned Tasks**

Assigned Tasks

Task ID	Subject	Priority	Assigned
---------	---------	----------	----------

Work Queues v

4. Click the **My Work Queues** folder.

Shortcuts <<

Tasks v

**Work Queues** ^

**My Work Queues**

Get Next Task From Preferred...

Get Next Task From Queue...

Subscribe to a Work Queue...

Notifications v

My Tasks

My Tasks

My Open Tasks My Deferred Tasks **Assigned Tasks**

Open Tasks

Subject	Priority	Deadline
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**Note:** The next task is the highest priority task assigned to the user with an approaching deadline.

5. The My Work Queues page displays. Click **Get Next Task From Queue** folder.

Shortcuts <<

Tasks v

Work Queues ^

My Work Queues

Get Next Task From Preferred...

**Get Next Task From Queue...**

Subscribe to a Work Queue...

Notifications v

My Tasks My Work Queues x

My Work Queues

User Subscribed Work Queues Other Subscribed Work Queues

User Subscribed Work Queues

Name
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6. The page displays the selected task. Click **Save**.



Get Next Task From Work Queue



Work Queue \*

Johnston County Transfer

Save

Cancel

## Navigation 101

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## NC FAST HELP/Job Aids

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## Module 3 - Customer Service

### Assessment

Your knowledge will be assessed with the following assessment:

- Keyboarding

### Customer Service

The goal of customer service is to meet customer needs and desires, and to exceed their expectations. It can also help to improve brand credibility and build relationships with customers.

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## What Is Customer Service?

Customer service is the support and assistance a business provides to customers before, during, and after they purchase a product or service. It can include a wide range of activities, such as:

- Answering questions
- Finding solutions
- Resolving complaints
- Interacting with customers
- Responding quickly to inquiries and issues
- Acting on customer feedback and suggestions
- Showing empathy and understanding
- Providing self-service options
- Emphasizing omnichannel support

## Importance of Customer Service

- Customer retention.
- Word of mouth
- Employee retention
- Company values

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## Activities

Complete the Myers-Briggs assessment using the following website:

<https://www.16personalities.com>. This activity can be done either in class or outside of class.

GAME – SPENT: <https://playspent.org/>

## Interviewing Clients

Caseworkers/Social Workers interview clients to learn about them and build relationships. Effective interviewing skills can help clients feel comfortable and open up. Here are some tips for interviewing clients:

- Set the purpose
- Discuss policy and ethics
- Ask questions
- Listen actively
- Be empathetic
- Be aware of nonverbal cues.
- Make the space comfortable

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## Guided & Effective Interview

### The Purpose of an Effective Interview

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### Client Interaction

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### **Key Points to remember while interacting with clients**

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### **Techniques for Effective Questioning**

#### **Advantages Open-Ended Questions**

- Encourages more client participation.
- Provides a more complete explanation of answers.
- Gather more information.
- Disadvantages of Open-Ended Questions.
- Allows the client to ramble.
- Takes more time.
- May result in some unnecessary, irrelevant disclosure of information.

#### **Examples of Open-Ended Questions?**

- Tell me about your situation.
  - Tell me about the work that you do?
  - Tell me about the money you received last month?
  - Tell me how you paid the rent?
  - Tell me about who lives in your home?
- Remember, asking leading questions is extremely important!

#### **Advantages of Closed-Ended Questions**

- Shortens the interview time.
- Disadvantages of closed ended questions
- Allows for minimal client participation.
- Eliminates explanations and in turn, information.

- May appear to be an interrogation.

### **Examples of Closed-Ended Questions?**

- What type of bank accounts do you have?
- How many hours do you work?
- How many people live with you?

### **When Should I Conduct an Interview?**

- Every Application
- Every Recertification
- Any time information is questionable.
- In-person visits
- When client requests an interview (whether in person or by phone)

### **Adding Documents/Uploads/Documentation**

Documentation is materials that provide official information or evidence or that services as a record. If it is not documented, it did not happen. Therefore, it is important that everything we record has information to back it up.

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### **Soft Skills**

Soft skills are intangible attributes, personality traits and behaviors that will help candidates obtain employment and succeed in their work. Unlike technical or hard skills, soft skills are interpersonal and behavioral skills that help you to collaborate well with other people and develop your career.

**Important Caseworker Skills:**

The acronym CUP(P)CAKES will help you to hon in on these skills more effectively.

**C**lear Communication

**U**naframed to Clarify

**P**atience & **P**ositive Language

**C**alming Presence

**A**ttentiveness

**K**eeping Promises

**E**tiquette

**S**pecific Product




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**6 Tips for Effective Communication:**

Relay clearly, keep it simple and leave nothing to doubt.

- |   |  |
|---|--|
| 1 | • Be conscious of your emotions as they will show through            |
| 2 | • Vary your voice, tone, and pitch                                   |
| 3 | • If you want people to accept your ideas share them with enthusiasm |
| 4 | • Be aware of your gestures and the impact that they have            |
| 5 | • Remember the old saying, "look them in the eye"                    |
| 6 | • Study the gestures of others and listen to their tone              |

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**Who is responsible for what?**

**Applicant Responsibilities:**

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• Give truthful and complete information.</li> </ul> | <ul style="list-style-type: none"> <li>• Provide required verifications.</li> </ul> |
|---|---|

- Must provide proof of identity and citizenship status.

#### **Caseworker Responsibilities:**

- Advise households of their rights and responsibilities.
- Inform households of their responsibility to report changes.
- Explain the appropriate application processing time standards.

- Report changes to the agency.

- Explore and resolve any unclear and incomplete information.
- Conduct the interview as an official and confidential discussion of household circumstances. Do not simply review the evidence that appears on the application form.

#### **Organization in the Workplace**

- |    |     |
|----|-----|
| 1. | 8.  |
| 2. | 9.  |
| 3. | 10. |
| 4. | 11. |
| 5. | 12. |
| 6. | 13. |
| 7. | 14. |

#### **Conflict Resolution**

Handling conflict in any context is never fun. Oftentimes, issues become more complicated than they need if the people involved need more conflict resolution and general communication skills.

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## **Module 4 – Introduction to Energy Assessments**

Your knowledge will be assessed with the following assessments:

- DSS & NC FAST Terminology
- Core Functions



## Introduction to Energy Assistance Program

### What is LIEAP?

The Low-Income Energy Assistance Program (LIEAP) provides a one-time annual energy provider payment to help eligible families pay their heating expenses.

The program starts December 1<sup>st</sup> and runs through March 31<sup>st</sup> or until funds are exhausted.

Priority groups can apply starting December 1<sup>st</sup>.

Eligible households must contain either:

- An elderly person aged \_\_\_\_ and above OR
- Person(s) with disabilities that receives services through the Division of Aging and Adult Services (DAAS).

From January 1<sup>st</sup>- March 31<sup>st</sup> all other applicants can apply.

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### What is CIP?

The Crisis Intervention Program (CIP) assists individuals and families who are experiencing a heating or cooling related crisis. A household is considered to be in a life threatening or health related crisis if the heating or cooling source is disconnected, or the household is currently experiencing or is in danger of experiencing a life-threatening or health-related emergency due to lack of heating/cooling, and sufficient, timely, and appropriate assistance is not available from any other source. Life-threatening is defined as a household which has no heating or cooling source or has a disconnect, final or past due notice for their primary heating or cooling service and the health or well-being of a household member would be in danger if the heating or cooling crisis was not alleviated. Each household should be evaluated on a case-by-case basis to determine if there is a heating or cooling crisis.

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### Income Base Period

Ongoing

Terminated

Child Support

Self-Employment

Current

Representative

Actual

New

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### **What is the Energy Provider Portal?**

The North Carolina Energy Provider Portal is a web-based tool that allows utility providers to quickly, easily, and accurately conduct their utility assistance activities.

### **Searching for Persons**

Types of Searches:

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### **Registering Person**

If the client searched for is not registered, then the register person process should be completed.

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### **Person Page Clean Up**

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1. Click “Edit,” the Edit Person window will pop-up.
2. Verify the registration date is correct.
3. Currency should be listed as “US Dollar.”
4. Method of Payment should be “EBT Card.”
5. Preferred Office must be selected as the current county.
6. Marital Status must match the most current information.
7. Ethnic Origin and Race cannot be “Unreported” or blank.

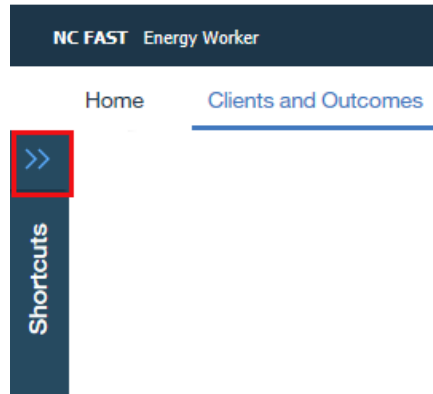
**Notes:**

- Enter all other applicable information.
- Navigate to the “Evidence” Tab on the Person Page to edit any evidence types applicable.

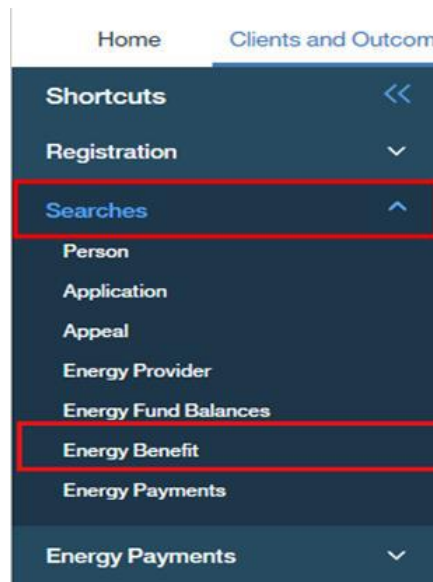
## Energy Benefits Search

The following instructions are the process to perform an Energy Benefits Search in NC FAST.

1. 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 pane.



- 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

Energy Benefit Search

Search Criteria

Reference

Additional Search Criteria

First Name

Last Name

Date of Birth

Gender

Search

Reset

- 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

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.

## Modules 5 & 6 – Energy

### Keying Applications

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"> <li>• For household's first Energy Assistance application in NC FAST</li> </ul>	On the head of household's <i>Person Page</i> , click the <b>Applications</b> tab then click <b>New Application</b> hyperlink.

	<ul style="list-style-type: none"> <li>If the household composition has changed since the household's last Energy application.</li> </ul>	
<b>SUBSEQUENT</b>	The household's next Energy Assistance application if the household's composition has <b>NOT</b> changed from the previous application.	On the <i>Energy Income Support</i> case, click the <b>Tab Actions Menu</b> then select <b>Add Energy Application</b> .

### 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

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### Match Clients in NC FAST

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### Processing and Determinations

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### OVS | The Work Number | SAVE

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## Forms/Notices

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

## Income Support Navigation

The screenshot displays the NC FAST Eligibility Worker interface. The top navigation bar includes links for Home, Clients and Outcomes, Inbox, Calendar, and Reports. The sidebar on the left contains shortcuts for Person Search, Sam Smith, and Income Support Application (111461020). The main content area shows the details for the Income Support Application (111461020) for Sam Smith, who is 47 years old. The application was submitted on 5/1/2018 and is currently pending. The eligibility checks section shows that the applicant is ineligible for all programs checked.

**Income Support Application (111461020)**

Sam Smith  
Primary 47 years

**Income Support Application** 111461020

Submitted Issues (0)

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

Submitted by: NCFast USER60484

**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 USER60484	Ineligible for all programs checked.



## 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

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## Module 7 – Energy Review & Assessment

### Checklist:

*Check off each individual item that you are proficient in*

- ☐ Understand how to navigate NC FAST
  - ☐ Searching for Persons
  - ☐ Register a Person
- ☐ Understand the Energy application to case process
  - ☐ Evidence Dashboard

- ☐ Processing and Determinations
- ☐ Forms/Notices
- ☐ Documentation

## Assessments

Your knowledge will be assessed with the following assessments:

- Energy Assistance application to case process

## Module 8 – Job Search | Career Counseling

*Congratulations you have reached the ½ mark of the class. Take this time to pat yourself on the back!!!!*

Take this opportunity to ask any questions you may have about Energy Assistance Program.

## Job Search/Career Counseling

Do you currently have an up-to-date resume? If not start writing down dates, jobs, and notes about the jobs you have had.

This image shows a full page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for handwriting practice or general note-taking. There are no margins, text, or other markings on the page.

## Types of Resumes

## Chronological

Functional

Combination

Resume with Profile or Summary

Nontraditional

Infographic

Targeted

Mini

## **Completing a Job Application**

Information normally required on a job application

- Driver's license number
- Social Security Number
- Work history
- Employer Names
- Employer Addresses
- Employer Phone Numbers
- Supervisor Contacts
- School / training experience
- Club and/or Organization Memberships (include any leadership roles/committees)
- Military record (Form DD-214), if applicable
- References (at least three)

## **Job Interviews**

### **Essential Job Interview Tips:**

1. Clean your social media presence. Over 90% of employers check the social media platforms of interview candidates.
2. Be prepared for "Tell me about yourself."
3. Be on time. By being late, you give the impression that you don't care, don't have control over your time, or don't respect the time of others.
4. Know your weaknesses.
5. Get plenty of practice
6. Video record your practice sessions. The perfect verbal responses will fall flat if your body language is incongruent. Some experts believe your body language is the most important factor.
7. Know the company.
8. Dress appropriately.

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## **Workplace Success**

### **Eight Tips to Achieve Success at Work:**

1. Understand your employer's expectations
2. Be a team player
3. Willingness to take on extra duties
4. Be considerate
5. Be on time
6. Meet deadlines
7. Pay attention to career advice
8. Maintain a positive attitude

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## **Module 9 – Introduction to Food & Nutrition Services (FNS)**

### **Searching for Persons & Registering a Person Review**

4 Types of Searches:

1. Social Security number
2. Name, gender
3. First 3 letters of first and last name, DOB, gender
4. Name, DOB, gender

### **Food and Nutrition Services (FNS) Program**

USDA's Food and Nutrition Service leverages its \_\_\_\_ nutrition assistance programs to ensure children, income eligible individuals, and families have equitable access to healthy, safe, and affordable foods that promote optimal health and well-being, while building a more resilient food system. FNS accomplishes this by partnering with over \_\_\_\_

states, U.S. territories, and tribal organizations that operate federal nutrition programs. FNS programs serve 1 in 4 Americans over the course of a year.

FNS's mission is to increase food security and reduce hunger in partnership with cooperating organizations by providing children and low-income people access to food, a healthy diet, and nutrition education in a manner that supports American agriculture and inspires public confidence.

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### History of FNS

The agency was established on Aug. 8, \_\_\_\_\_, a few months before the first White House Conference on Food, Nutrition and Health. Many of the programs and activities FNS administers today were formed or expanded due to recommendations from the 1969 Conference.

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### Food & Nutrition Services Applications

How to Apply

- \_\_\_\_\_
- By-Mail
- Online ePASS applications
- \_\_\_\_\_
- Phone

\*\*\*Interviewing & Timeframes – refer back to information in Module 3\*\*\*

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### Eligibility Requirements

Verify all eligibility factors when determining benefits. It is determined during the interview process and during the time prior to disposition. Use any acceptable form of verification to determine if the Food and Nutrition unit meets the following eligibility requirements:

- Identity
- \_\_\_\_\_
- Citizenship/Alien Status
- Enumeration
- Household Size/Composition
- \_\_\_\_\_
- Voluntary Quit
- \_\_\_\_\_
- Work Registration/ABAWD Status
- \_\_\_\_\_
- Resources

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### Household Composition Requirement

All individuals who eat together must be included in the same Food and Nutrition Service (FNS) unit.

- Individuals living together who purchase/prepare food together or do so upon receipt of food assistance.
- Spouses living together or individuals representing themselves as husband and wife to the community.
- Individuals under 22 who are living with a natural, adoptive, or stepparent.
- Individuals under 18 that are under the parental control of an adult living in the home.
- Two unmarried adults living in the same home who are parents of a mutual child

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### Work Registration Requirements

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## Mandatory Verification

Verify all mandatory eligibility factors prior to certification, denial, reduction, or termination for FNS benefits.

- Identity
- Residency
- Citizenship/Alien Status
- Household Size/Composition
- Enumeration
- Gross Non-exempt income

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## OVS | The Work Number | SAVE

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## Module 10 – Keying FNS Applications – Application to Case

Start the application process in the Community College Environment in NC FAST through the guided interview prompts.

### Steps to Start the Application Process

1. Navigate to the Persons page. Click the **Applications** tab.  
**Participant Note:** For navigation steps to the Person page, refer to *Searching for Persons* procedure.
2. The Applications page displays. Click the **New Application** hyperlink.
3. The New Application pop-up appears. In the Name column select the applicable program(s) check box, then click **Next**.
4. The Information About the Claimant pop-up appears. Enter and select the applicable information, then click **Next**.

#### Participant Notes:

- Additional screens may be added or omitted based on application choice(s).
- All mandatory fields must be entered. Review the data entered after each section of the application is completed.



5. The Suggested Addresses pop-up appears. Select the applicable information then click **Next**.
6. The Claimant Details pop-up appears. Enter and select the applicable information, then click **Next**.
7. The Review the Claimant's Answers pop-up appears. Review the about you information for accuracy, then click **Next**.
8. The General Information pop-up appears. Enter and select applicable information, then click **Next**.
9. The Review the Claimant's Answers pop-up appears. Review for the your home information for accuracy, then click **Next**.
10. The Benefits Information pop-up appears. Enter and select applicable information then click **Next**.
11. The Review the Claimant's Answers pop-up appears. Review the benefit information for accuracy, then click **Next**.
12. The Income Information pop-up appears. Enter and select applicable information then click **Next**.
13. The Review the Claimant's Answers pop-up appears. Review the income information for accuracy, then click **Next**.
14. The Resources General Information pop-up appears. Enter and select applicable information, then click **Next**.
15. The Review the Claimant's Answers pop-up appears. Review the resource information for accuracy, then click **Next**.
16. The Expenses Information pop-up appears. Enter and select applicable information then click **Next**.
17. The Review the Claimant's Answers pop-up appears. Review the expenses information for accuracy then click **Next**.
18. The Review the Claimant's Answers pop-up appears. Review the information for the entire application for accuracy, then click **Next**.
19. The New Application pop-up appears. Click the applicable New Application check boxes, then click **Submit**.
20. The Application page displays the new application in '*Submitted*' status.

## Job aids

ABAWD Work Requirements Exemption
Adding Employment
Adding Evidence to an Application
Adding Work Registration Evidence
Application to Case
Authorizing an Application
Checking Eligibility

Creating Person Notes
Expedited FNS Applications
Generating and Completing Form
Match Client
Record Communication With a Client
Registering Employers
Registering Persons
Searching for Applications
Searching for Cases
Verifications
Verifying North Carolina Residency
Work Non-Participation Evidence
Working with Changed Decisions on Income Support and Insurance Affordability Cases

## 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.

## Evidence Dashboard

The Evidence Dashboard is important to ensure that all information gathered at all stages of the interview process has been documented.

The screenshot displays the 'Evidence' tab in the NC FAST system. At the top, there's a header for 'Income Support Application' with a progress bar and a 'Submitted' status. Below this, a navigation bar includes links like Home, All Documents, Clients, Programs, Timers, Evidence (selected), Related Cases, Eligibility Checks, Ineligibility Period, Appeals, Work Eligibility, Administration, Online Data, Assessments, and A/S. The main content area is titled 'Dashboard' and features a sidebar with 'Active', 'In Edit', 'Verifications', 'Issues', 'Incoming Evidence', 'FNS & Work First', and 'Guided Change'. The dashboard itself is divided into several sections: 'Household' (with sub-items like Head of Household, Household Member, Household Relationship, Living Arrangement, Residency, and Voter Registration), 'Income' (with sub-items like Benefit, Earned Income, and Paid Employment), 'Expense' (with sub-items like Contributor, Shelter Expense, and Utility Expense), and 'Deductions' (with sub-items like Contributor, Shelter Expense, and Utility Expense). Each section has a status indicator (green triangle) and a 'Recorded' button. The 'Household' and 'Income' sections are highlighted with a yellow border, and the 'Expense' and 'Deductions' sections are highlighted with a red border.

## Managing Evidence on the Dashboard

Most Common Evidence Types for FNS:

### Household Section:

- Head of Household
- \_\_\_\_\_
- Household Meal Group
- \_\_\_\_\_
- Household Relationships
- \_\_\_\_\_
- Residency
- \_\_\_\_\_
- Disability
- \_\_\_\_\_

### Income Section:

- Benefit – Evaluate for TANF funded services
- Paid Employment
- \_\_\_\_\_
- Working Hours

## Processing and Determinations

Verify all eligibility factors when determining eligibility for FNS benefits. Eligibility is determined during the interview process and during the time period of disposition. Use any acceptable form of verification to determine if the Food and Nutrition Services unit (FNSU) meets the following eligibility requirements:

- |                            |                  |                               |
|----------------------------|------------------|-------------------------------|
| • Identity                 | • Resources      | • Work                        |
| • Residency                | • Income         | Registration/ABA              |
| • Citizenship/alien status | • Student Status | WD Status                     |
| • Enumeration              | • Voluntary Quit | • Controlled Substance Felons |

The following expenses are used to determine benefit levels but are not eligibility requirements.

- Utility Expense
- Mortgage or Rental Expenses
- Property Taxes
- \_\_\_\_\_
- Medical Expenses
- Legally Obligated Child Support Payments
- \_\_\_\_\_

- Ensure that verifications have been requested at the time of the interview and the client given 10 days to return needed documents. This is done through DSS 8650. See below.

- OVS | TWN |SAVE also must be run before the determination of application is done.  
See previous modules.
- Once all evidence is edited and verified ...
  - o **Check Eligibility** can be run.
  - o **Apply Changes**
  - o Mark the application **Ready for Determination**
  - o **Review Eligibility Result**
  - o **Authorize** or **Deny** the application
  - o **Activate PDC** – from the head of household’s Person Page, click **Care and Protection** tab, then click on the applicable hyperlink for the FNS product delivery case.
    - Once activated click the **Determinations** tab, make sure the case shows *Eligible* and for the correct amount.
    - Click on the **Certifications** tab and verify that the certification period is correct.

## Forms/Notices

Discuss the forms/notices that are common for the FNS Programs.

Language Services Agreement – DSS 10001
NC Rights and Responsibilities for Public Assistance – NC FAST 20009
Application for Food and Nutrition Services DSS 8207
Food and Nutrition Services (FNS) Notice of Information Needed - DSS 8650
Documents Needed to Complete Your Application - DSS 8650A
Caseworker Desk Reference – DSS 8560
Notice of Eligibility Denial or Pending Status – DSS 8551

## Income Support Navigation & Documentation

Refer to previous sections.

## Modules 11-13 – Food & Nutrition Services

Continue to process FNS application scenarios located in Module 10. You should be able to navigate in NC FAST and complete several approved FNS applications. Continue to practice your skills outside of the classroom.

## Modules 14 – Food & Nutrition Services Review & Other Topics

Take this time to continue to practice your skills and practice the FNS application to case process.

### Checklist:

Check off each individual item that you are proficient in

- ☐ Understand how to navigate NC FAST
  - ☐ Searching for Persons
  - ☐ Register a Person
- ☐ Understand the FNS application to case process
  - ☐ Evidence Dashboard
  - ☐ Processing and Determinations
  - ☐ Forms/Notices
  - ☐ Documentation

Make sure you take the opportunity to ask any outstanding questions to your instructor.

### **Questions???**

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### **Other Topics**

#### **Able Bodied Adults without Dependents (ABAWD)**

Able-bodied adults without dependents (ABAWDs) can only receive \_\_\_\_\_ for only \_\_\_\_\_ months in a \_\_\_\_\_ year period if they do not meet certain extra work requirements. This is called the ABAWD time limit.

FNS Unit members between the ages of \_\_\_\_\_ whose home does not include a person under the age of 18, are only allowed to receive \_\_\_\_\_ free months of FNS benefits. In a 36-month period unless they fit the following criteria:

- Over the age limit
- Member of an FNS unit containing a member who is under the age 18
- \_\_\_\_\_
- Exempt from FNS Work Requirements
- Unfit for employment
  - Receiving public or private disability benefits
  - Unfit based on caseworker's observation or judgement (the medical condition is obvious)
  - Medically certified as physically or mentally unfit for employment

- Homeless individual who lacks a fixed and regular nighttime residence
- \_\_\_\_\_
- Exempt a refugee based on certain requirements
- Foster Care – Individuals who are 24 years of age or younger and who were in Foster Care on their 18th birthday.
- \_\_\_\_\_

### **Expedites**

If the \_\_\_\_\_ application is processed using expedited service standards, the household must be able to purchase food no later than the \_\_\_\_\_th calendar day following the date of application.

### **Overview of the Supplemental Nutrition Assistance Program (SNAP)**

North Carolina's Supplemental Nutritional Assistance Program (SNAP) is a demonstration project designed to deliver food assistance to \_\_\_\_\_ individuals receiving Supplemental \_\_\_\_\_ (SSI). SNAP is a simplified version of Regular Food and Nutrition Services (FNS).

Individuals must meet the following criteria to be eligible for SNAP:

- Receive SSI, (individuals may have other income as well) and
- Age \_\_\_\_\_ or older, and
- Not living in an institution (being in an Alcohol/Drug Treatment Center (ADTC) is considered being institutionalized for SNAP purposes), and
- Residing in \_\_\_\_\_, and
- Purchasing and preparing food separately from other people living in the home, and
- Not be receiving Food and Nutrition Services, Food Stamps, or SNAP in another state.

All SNAP Cases are one person households. SNAP households must meet regular Food and Nutrition Services household concept eligibility requirements.

**NOTE:** Married individuals living in the same home cannot be considered a separate household.

Income and deductions are not considered when determining SNAP allotment amounts. Only shelter costs are used to determine the allotment amount. Allotment amounts for SNAP are as follows:

- The FNS allotment amount is \$\_\_\_\_\_ if the rent, mortgage, and/or lot rent expense is less than \$150 per month.
- The FNS allotment amount is \$\_\_\_\_\_ if the rent, mortgage and/or lot rent expense is \$\_\_\_\_\_ or higher per month.

## **SNAP Application Procedures**

Individuals applying for Regular Food and Nutrition Services will be evaluated for and authorized for SNAP if criteria for SNAP is met and the SNAP allotment amount is equal to or greater than the current allotment amount.

Potential SNAP recipients are identified monthly via the North Carolina State Data Exchange (SDX) match process and are automatically mailed a SNAP Application. Applications are processed within \_\_\_\_\_ days of the date the application is received in the local Department of social Services (DSS). Eligible households automatically receive an EBT card with PIN instructions once the SNAP application is approved. SNAP cases are certified for \_\_\_\_\_ months.

## **Modules 15 – FNS Assessment**

*Congratulations!!!!* You have made it through the entire class. Now it's time to assess your knowledge in the topic of Food & Nutrition application to case process.

### **Final Checklist:**

*Check off each individual item that you are proficient in:*

#### Energy

- ☐ Understand how to navigate NC FAST
  - ☐ Searching for Persons
  - ☐ Register a Person
- ☐ Understand the Energy application to case process
  - ☐ Evidence Dashboard
  - ☐ Processing and Determinations
  - ☐ Forms/Notices
  - ☐ Documentation

#### FNS

- ☐ Understand how to navigate NC FAST
  - ☐ Searching for Persons
  - ☐ Register a Person
- ☐ Understand the FNS application to case process
  - ☐ Evidence Dashboard
  - ☐ Processing and Determinations
  - ☐ Forms/Notices
  - ☐ Documentation

#### Assessments

- ☐ DSS & NC FAST Terminology

- ☐ Keyboarding
- ☐ Core Functions
- ☐ Energy Assistance NC FAST Assessment
- ☐ Energy Assistance Level I
- ☐ Career Readiness Certification
- ☐ FNS NC FAST Assessment

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