

# Adding a Client to an Active FNS Case

Last Updated: 12/18/2023

Last Reviewed: 12/18/2023

## Overview

This job aid describes how to use the steps below to add a client to an active FNS case only.

### Notes:

- To add a client back to a case from which they were earlier removed, add new evidence, as if adding a new person. Do not edit end dates for existing evidence.
- When adding an individual, it is recommended to put the start date of the evidence as the end of the month so that the system will push the effective date to the 1st of the next month, without a split decision.
- Do not add a person to a case if she/he is currently a member of another case. Instead, end the individual's evidence for the previous case as the last day of the last month she/he should be included in. Accept with adequate notice if the individual is over the age of 18 and is being removed from the previous case. Accept with timely if the individual is under the age of 18 and being removed from another active case. The timely notice can be waived if the current active case is in the last month of the certification period.  
**Note:** For any additional guidance on when to accept with timely or adequate notice refer to FNS policy.
- Then follow the steps below to add the individual to the new case.

## Step-by-Step Instructions

1. Conduct a Person Search for the client being added to the case by using as much demographic information as possible, for example SSN, date of birth, name, address, gender, etc.

**Note:** For more information regarding a person search, refer to *Searching for Person* job aid.

- a. If the search result under the Source column is CNDS:
  - i. Select the **Person** hyperlink in the Registration folder in the Shortcuts panel then conduct a Person Search through the wizard.

- ii. Select the radio button beside the correct CNDS Person then click **Next**.
    - iii. Follow the steps to complete the Registration Wizard.
    - iv. Click **Finish**.
    - v. The Person page displays.
  - b. If the search result under the Source column is NC FAST:
    - i. Click the **Person** hyperlink to open their Person page.
  - c. If there are no results:
    - i. Select the **Person** hyperlink in the Registration folder in the Shortcuts panel and conduct a Person Search through the wizard.
    - ii. Click **Next**.
    - iii. Follow the steps to complete the Registration wizard.
    - iv. Click **Finish**.
    - v. The Person page displays.
    - vi. If applicable, add the SSN as an alternative ID on the Persons Evidence tab.
- 2. Navigate to the Income Support Case. Click the Income Support Case **number** hyperlink.

**Note:** For navigation steps to the Income Support Case, refer to *Searching for Cases* job aid.
- 3. Manage Evidence and Verifications (Income Support Evidence Dashboard) for the new household member being added. Enter the Start Date as the end of the month so that the system will push the effective date to the 1<sup>st</sup> of next month.

**Note:** For additional guidance on how to manage evidence, complete verification and apply changes and on-hold decision refer to the *Application to Case* job aid.

  - a. Click the **Evidence** tab.
  - b. Add Household Member, Living Arrangement, Household Meal Group (if not already existing), Household Meal Group Member, Residency, and Household Relationships evidence.
  - c. Add any other Household, Income, Resource or Expense evidence for the client being added including Work Registration if applicable.
  - d. Navigate to the Verifications folder and verify any outstanding evidence.



- e. Check Eligibility. Review results to make sure the new household member is added to the assistance unit and benefit amount is correct. If incorrect, review and correct evidence and complete Check Eligibility again.
- f. Apply Changes to the evidence.
- g. Accept the Changed Decision. Review results to make sure the new household member is added to the assistance unit and benefit amount is correct. If incorrect, review and correct evidence before accepting the on-hold decision.  
**Note:** For any additional guidance on when to accept with timely or adequate notice refer to FNS policy.
- h. Navigate to Determinations tab on the PDC to ensure the latest decision is On Hold and correct.
- i. Navigate back to Determinations tab on the PDC to view the Accepted Decision.