

Phase II - Modules 5 - 6

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Review

Take this opportunity to review Phase I with the students, allowing them to catch up and refine their skills. Use the scenarios from Phase I, which can be found in the Module 1 folder. Make sure to cover the following key points:

- Navigation 101
- Energy & FNS Application to Case process
- Income Support Navigation
- Notices/Forms
- Documentation

This will help ensure that students are well-prepared and confident in their abilities.

FNS – Processing Recertifications

Processing Food and Nutrition Services (FNS) recertifications involves several key steps to ensure continued eligibility for benefits such as application submission, information update, documentation, interview, timeliness, and notification.

Forms/Notices

Designation of Authorized Representative	DSS 1688
Notice of Expiration and Recertification Form	DSS 2435r
Simplified Nutritional Assistance Program (SNAP) Notice of Expiration	DSS 8232
Notice of Information Needed to Complete your Food and Nutrition Services (FNS)	DSS 8650

IMPORTANT NOTE: You can find forms, notices, and any other additional documents in the relevant folder within the current module or in previous modules.

Phase I walked students through the process of FNS application to case. Now students will learn how to process recertifications.

The students will learn how to:

- Determine if a recertification is Timely, Untimely, or Late.
- Determine the Time Standards for processing.
- Complete the steps to process the recertification successfully.

Each month, NC FAST identifies active cases under Simplified Reporting with certification periods expiring the following month. It then generates and mails the FNS unit a DSS-2435, Food and Nutrition Services (FNS) Notice of Expiration and Recertification Form. This selection process occurs on the **twelfth** calendar day of the month unless it falls on a holiday or weekend.

The DSS-2435 (located in the Modules 2_3 folder) is considered a filed application if it is signed by an adult household member or an authorized representative. The applicant's name and address must be included, and the form must be time-stamped upon receipt.

If the form is not signed, the caseworker must return it.

Review the form for completeness by ensuring a. All blocks are checked. b. The form is signed by the applicant or authorized representative. c. Verification of the FNS unit's income (both earned and unearned) for the base period is attached. d. Verification of reported changes is attached.

Certification Period

Once the application is processed, the certification period, the number of months they are eligible for, is determined by the household's situation. They will be eligible for either 6 or 12 months.

- FNS households that contain only specified individuals who do not have any EARNED income are certified for 12 months.
 - **NOTE:** they may have unearned income
- All other households are certified for 6 months.

Method

Enter the information received accurately.

If an interview was completed - “Method” should be “In-Person/Phone.”

If an interview was not completed – “Method” should be “Paper, Email, Fax.”

NOTE: the “Method” must be entered in NC FAST.

12 Month Certifications

Households that are certified for 12 months must always have an interview completed to continue receiving benefits, as interviews are required yearly.

Recertification Changes

What to look for:

- Review and compare the DSS-2435 to the information that is active on the Income Support Case Evidence Dashboard
- Look for any changes from the last action taken on the case at the previous application, recertification or change.
- Read all the narrative on the HOH Person Page from the last recertification/application until now.
- Run OVS and compare the information to the updated hits showing up for all household members and address those prior to processing the recertification.

Change	What to do?	Change	What to do?
Household Composition	Verify if questionable	Earned/Unearned Income	Verify income using the 30 days prior to provided date
Authorized Representative	New DSS-1688 must be filled out at each recert	Child Support Income	Verify and update
Citizenship	Verify new members and run SAVE for Documented Aliens	Child Support Expense	Verify and update

Student Status	Confirm eligibility and update if changed	Shelter Expenses	Compare and update if changed
Enumeration	Verify new Social Security Numbers	Childcare Expenses	Verify and update
ABAWD	Check Time Limits for used months	Medical Expenses	If source or amount changed more than \$25- update and verify
Work Requirements	Verify status and update if changed	Reported or Discovered Change	Verify and update

Notes:

- This list is not exhaustive. All evidence on the dashboard should be reviewed and, if necessary, compared and acted upon based on the information provided in the DSS-2435 form.
- See folder for copy of DSS-2435 Notice of Expiration and Interview Recertification Form.

Managing Evidence

- **End date** evidence exists that is no longer current on the last day of the certification month.
- **Start date** the new current evidence on the first day of the new recertification month.
- **End date** any existing evidence on the last day of the month if you will not be adding new evidence to replace the old.
- **Run OVS** for all household members and address any discrepancies.

Time Standards

Timely: Must be completed by the last working day of the final month of the certification period.

- Timely recertifications entitles the FNS unit to uninterrupted FNS benefits; therefore, if eligible, benefits must be available to the FNS unit on their normal issuance date.
- Timely recertifications are submitted the 1st-15th in the last month of the certification period.

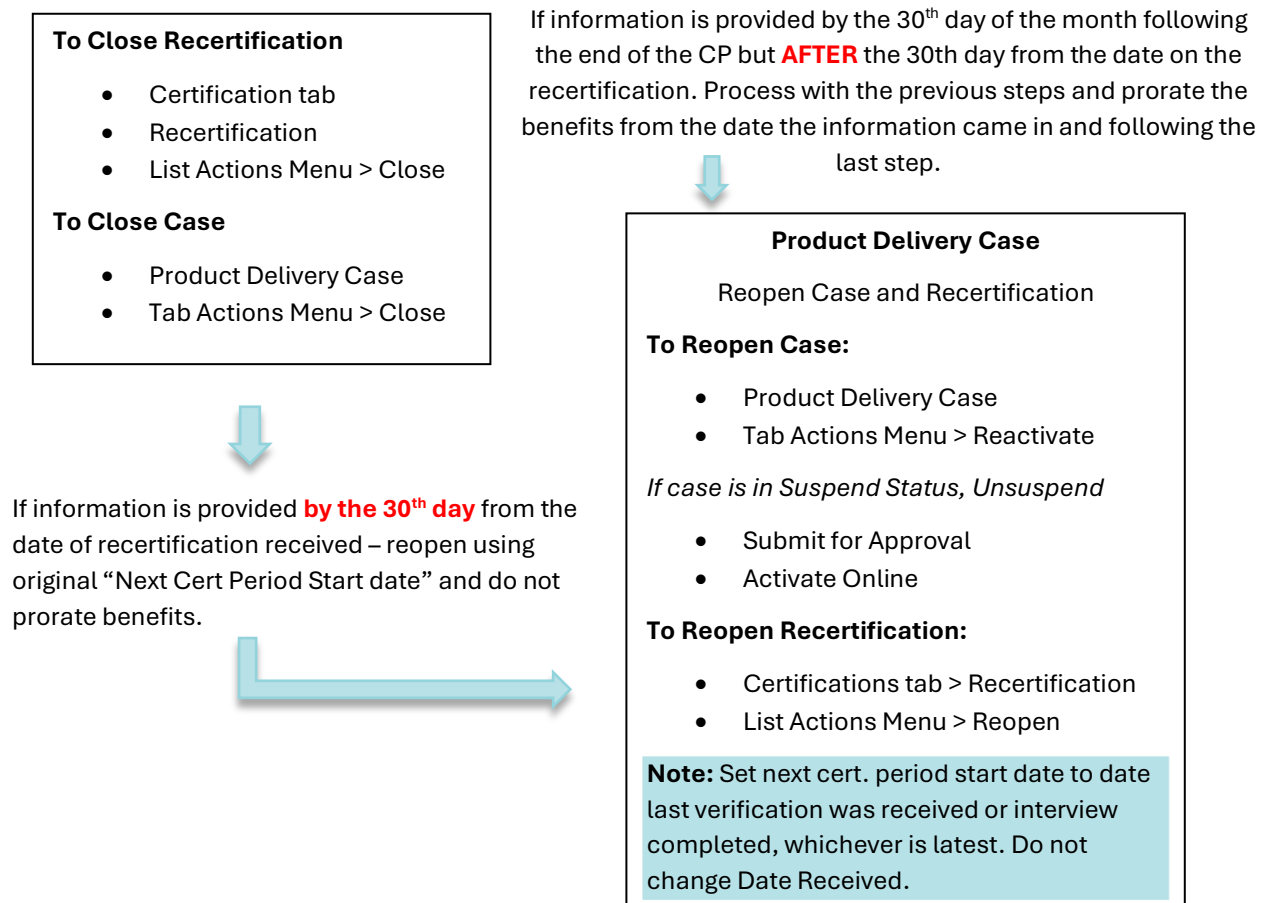
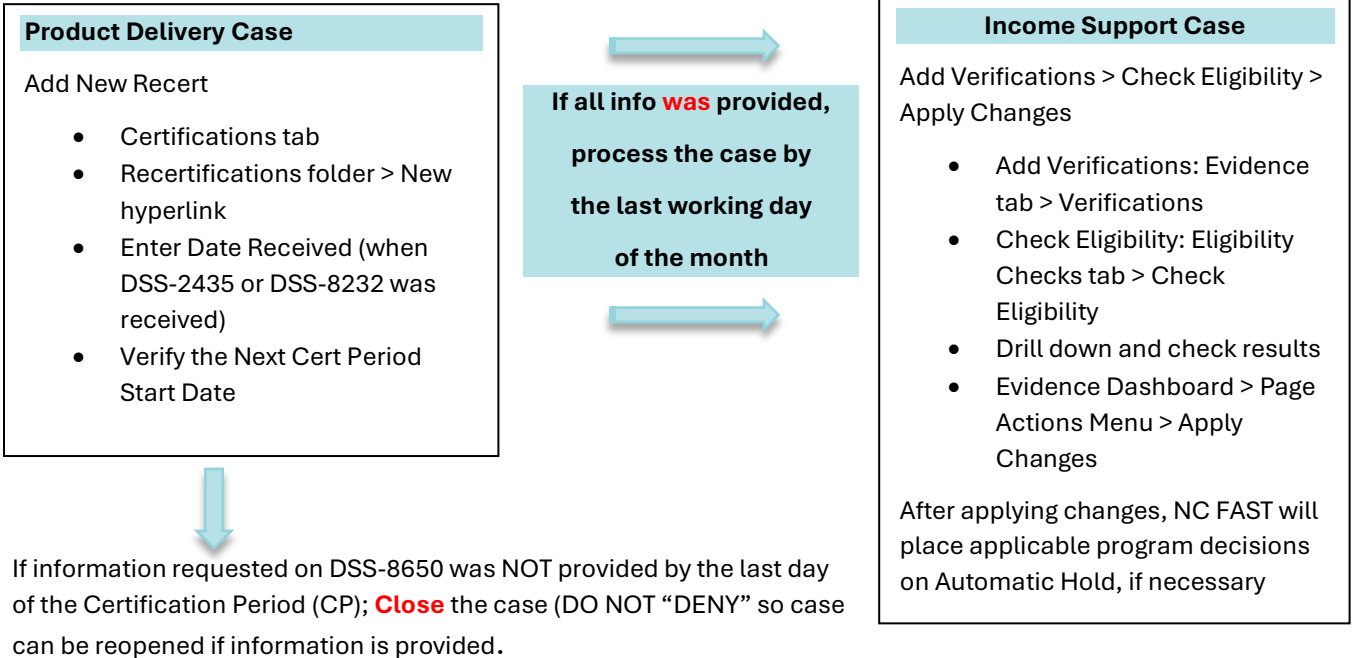
- Process the timely recertification by the end of the certification period if required interview is completed and all required verification is provided.
- Close the case on the last workday of the month if required interview is not completed or if all required verifications are not received.

Untimely: Must be completed within 30 calendar days from the date the recertification is received. If the 30th day falls on a weekend or holiday, the due date will be the next working day.

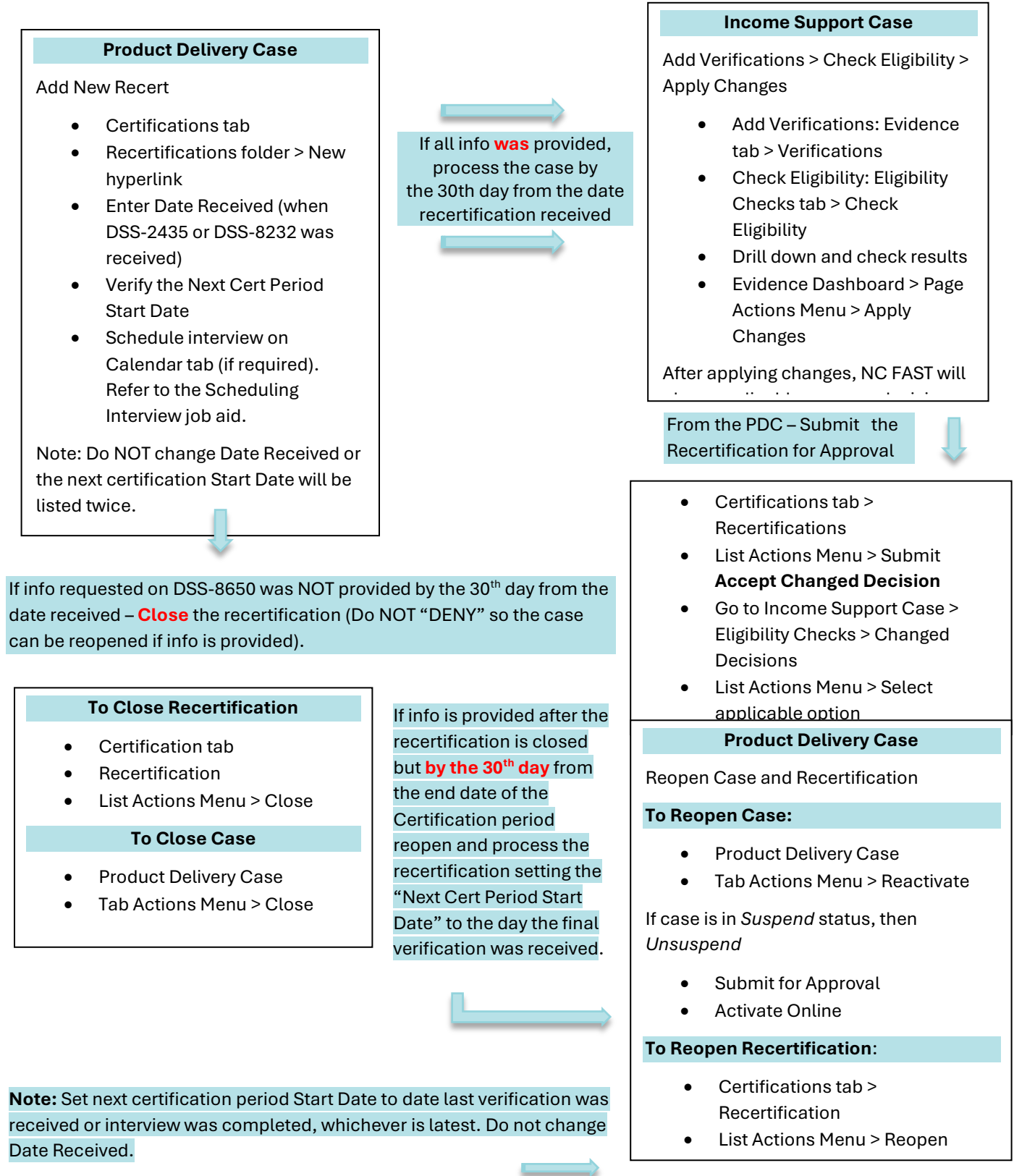
- An untimely recertification does not guarantee uninterrupted FNS benefits.
- Untimely recertifications are submitted the 16th through the last day of the month, in the last month of the certification period.
- Process the untimely recertification no later than 30 days from the received date of the recertification. If the FNS is eligible for benefits, the benefits must be available by the 30th day.

Late: Must be completed within 30 calendar days, or within 4 calendar days if expedited. If the 30th day falls on a weekend or holiday, the due date will be the next working day.

Timely Recert in NC FAST Flowchart



Untimely Recert in NC FAST Flowchart



Entering Recertification into NC FAST

Next demonstrate the recertification process in NC FAST.

Food & Nutrition Services -

Head of Household 41 years, Member 43 years, Member 17 years

Food & Nutrition Services
Income Support
Legacy Case ID
Transitional
Expedited
Last Payment
Last Payment Date
Start Date

Home Determinations **Certifications** Groups Financials Appeals Case Details Events Administration FSIS Benefit History

Certification Periods

Recertification

Date Received	Completion Date	Method	Status	New Cert Start Date
		Paper, E-mail, Fax	Completed	
		Paper, E-mail, Fax	Completed	
		In-Person	Completed	

Recertifications
Interviews

New...

At recertification the “Method” is selected in the process of starting the recertification in NC FAST.

1. Click the *Certifications* tab
2. Click on *Recertification* folder
3. Click the *New* hyperlink

Mandatory fields

1. Date Received – date the recertification is received by the agency.
2. Method – should reflect in the manner the form was received.
3. Next Certification Period Start Date – this will prepopulate the 1st day of the next certification period.
4. Registration Request – Did the client mark they wanted to register to vote (only can be answered once and can’t be edited).
5. Date Required Information Provided – the date the final evidence was received.

Interviews

If the interview is required:

1. Contact the FNS unit by telephone to conduct the recertification interview. If the household cannot be contacted by phone a DSS 8650 must be mailed with a scheduled appointment.
2. Mail the FNS unit DSS 8650, Notice of Information Needed, with a scheduled appointment. The DSS 8650 must include a specific date, time, and method of the

interview (telephone or face-to-face). The appointment may be either a telephone or office interview. Other information CAN be requested on DSS 8650.

a. Sending the NC FAST DSS 8650

- i. From the Income Support Case
- ii. Select the Case Details/Communications Tab
- iii. Click on the ellipsis
- iv. Choose “*New Pro Forma*”
- v. The pop-up appears. Select the Head of Household as the “Case Participant”
- vi. Select the name of the Household member as “*Case Participant*” the form is regarding
- vii. Select Next
- viii. Choose “*Missing Information*” as the type and Search
- ix. Select the DSS-8650 in the required language
- x. Select the correct address for where the DSS-8650 should be sent
- xi. At the top – update the “*Notice Type*” to read as “*Recertification*”
- xii. System will auto fill the date field – 10 days from today. Do not change this
- xiii. Scroll down the DSS-8650, selecting all items needed
- xiv. Enter the interview information into the “*We will contact you by telephone at _____*” boxes according to the date and time saved on the calendar
- xv. Select Save
- xvi. Find the DSS-8650 – click the ellipsis View/Print to make the form is correct and then print the form and give/send to client
- xvii. Click the ellipsis again and select “*Edit*”

- xviii. Change the “*Communication Status*” to “*Sent*” to update the status.
No other changes can be made to the form once in Sent status.

Next demonstrate the steps to completing the interview in NC FAST.

Date Received	Completion Date	Method	Status	New Cert Start Date
7/10/2024		Phone	In Progress	8/1/2024
7/5/2023	7/24/2023	Paper, E-mail, Fax	Completed	
7/5/2022	7/20/2022	Paper, E-mail, Fax	Completed	
7/9/2018	7/10/2018	In-Person	Completed	

3. Navigate to the Certification Tab/Recertification tab.
4. Click the 3 ellipses beside the current recertification
5. Click Add Interview and a “New Interview”

6. Add the Subject as “FNS Recertification Interview.”
7. Use the specific date and time that matches the DSS 8650 as the start date and time.
8. Navigate to the Interview tab and from here you can Edit/Complete/Cancel the appointment as needed.

Home	Determinations	Certifications	Groups	Financials	Appeals	Case Details	Events	Administration	FSIS Benefit History
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Certification Periods	Interviews	Interviews
Recertifications		

Subject	New Cert Start Date	Start Time	End Time	Location	Status	
FNS Recertification Interview	8/1/2024	7/12/2024 09:30	7/12/2024 10:00		Scheduled	...

Missed Interview

If the FNS unit fails to complete the recertification interview or contact the agency to reschedule, deny the recertification using the appropriate processing time frame standards based on the date the recertification was received. The case can be reopened if the interview is completed by the 30th day following the last day of the certification period.

Closing Recertification

This action can be demonstrated in class for instruction and discussion.

Close the recertification on the last day of the month or 30th day as appropriate if the interview is not completed.

From the Product Delivery Case (PDC) Actions tab choose Close Case.

Choose the Closure Date > Reason (*Missed Interview*) > Comments are optional > Click Save

Late Recert in NC FAST Flowchart

Product Delivery Case

- Tab Actions Menu > Unsuspend
- Tab Actions Menu > Close

Note: Use Close Reason Recertification not received.

Add a "Short App"
From the Income
Support Case.



Income Support Case

Add application & submit

- Tab Actions Menu > Add application (short form)
 - Answer all applicable questions paying closing attention to expedited information.
 - Submit Application
- Add additional Household Members to Income Support Application on Clients Tab > New



This will create an Income Support Application attached to the original Income Support Case.

If info requested on DSS-8650 was provided by the 30th day.



Income Support Application

Enter and Verify all evidence.

Note: Adding/updating evidence must be completed even if all verifications have not been received.

- Evidence Dashboard (Evidence tab)
 - Update existing evidence and/or add new evidence
 - Add Verifications (Evidence tab > Verifications)
- Check Eligibility
 - Eligibility Checks Tab > Check Eligibility
 - Drill down, examine results carefully
- If correct, Evidence Dashboard > Page Actions Menu > Apply Changes

Product Delivery Case

Tab Actions Menu >
Activate Online

Income Support Application

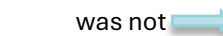
Schedule the interview (if applicable) on the Income Support Application.

When an application is completed, NC FAST creates new Head of Household (HOH) evidence. This information must be discarded.

Evidence Tab

- HOH evidence
 - Discard the new duplication HOH evidence created by NC FAST.
- Household Relationship evidence
 - Discard the new duplicate relationship evidence if created by NC FAST.
 - Discard ALL duplicate evidence on the Evidence Dashboard created by NC FAST

If info requested on the DSS-8650 was not provided by the 30th day



Income Support Application

If denying late recertification for missed interview:

- Programs tab
- List Actions Menu > Deny

If denying application for failure to provide info on the 30th day.

- Check Eligibility – Eligibility Checks Tab > Check Eligibility
- Evidence Dashboard > Page Actions Menu > Apply Changes – Including unverified evidence
- Tab Actions Menu > Ready for Determination
- Tab Actions Menu > Review Eligibility Result > Deny

Reopen Timeframes for Timely/Untimely Recertifications

This is just helpful information and does not need to be illustrated in class just discussed with students.

If required information is provided:

<i>Within 30 days from the date the recertification was provided</i>	<i>After the 30th day from when the recert was received but before the 30th day following the end of the certification period</i>
Reopen the case	Reopen the case
Keep the original date of recertification	Change the “Next Cert Period Start Date” to reflect the day the required verification was received
Do not prorate benefits	Prorate benefits from the date the information was received

You must process the case **within 5 calendar days** of receipt of the required information.

Documentation

Documentation is essential when completing an FNS (Food and Nutrition Services) recertification for several reasons:

1. **Ensuring Accuracy:** Proper documentation helps verify that all information provided by the household is accurate and up to date, which is crucial for determining eligibility and benefit amounts.
2. **Compliance:** It ensures compliance with federal and state regulations, demonstrating that all required procedures and guidelines have been followed.
3. **Accountability:** Documentation provides a clear record of actions taken and decisions made, which is important for accountability and transparency, especially during audits or reviews.
4. **Continuity of Benefits:** Accurate documentation helps prevent interruptions in benefits by ensuring that all necessary information is available and verified in a timely manner.
5. **Effective Communication:** It facilitates clear communication among caseworkers and with the FNS unit, helping to avoid misunderstandings and ensuring that everyone involved has access to the same information.
6. **Historical Record:** Maintaining detailed records of changes and actions taken over time is important for tracking the history of a case, which can be useful for future reference or if issues arise.

Cited Sources

NC FAST Phase I Training Curriculum

Buncombe County Department of Social Services Training Curriculum

NCDHHS Energy Programs Policy Manuals [EP Policies/Manuals – NCDHHS Policies and Manuals](#)

NC FAST HELP

https://ncfasthelp.nc.gov/FN_B/FN_B/server/general/projects/FAST_Help/FAST_Help.htm