NC FAST

North Carolina Families Accessing Services through Technology

Adding a Client to an Active FNS case only

Use the steps below to add a client to an active FNS case only. The existing Income Support Case should only have an FNS product associated with it and the new client is only being added to an FNS and NOT applying for any other programs. This job aid will be amended at a later time with information about adding clients to Cases with multiple programs.

Note*: When adding an individual, using the actual date causes split decisions at this time –but it does push the effective date to the next month. It is recommended to put the start date of the evidences 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.

1. Conduct a Person Search for the client that you are adding to the case by using as much demographic information as possible, for example SSN, date of birth, name, address, gender, etc.
    a. If source CNDS result:
        i. Select the Person hyperlink in the Registration folder in the Shortcuts panel 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 loads
    b. If source NC FAST result:
        i. Click the Person hyperlink to open their Person Page
    c. If no results found:
        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 loads
        vi. If applicable, add their SSN as an alternative ID on the Person Evidence tab

2. Conduct a Person Search for whose case to which you want to add the client to. Use as much demographic information as possible, for example SSN, date of birth, name, address, gender, etc.
    a. From the Person Home Page, click the Care and Protection tab
    b. Click the Income Support Case number hyperlink
    c. Click the Evidence tab

3. Manage Evidence and Verifications (Income Support Evidence Dashboard)
    a. Add Household Member, Living Arrangment, Household Meal Group (if not already existing), Household Meal Group Member, Residency, and Household Relationships evidence evidence using actual date the member entered the household as the start date.
    b. Add any other Household, Income, Resource, or Expense evidence for the client being added including Work Registration if applicable evidence using actual date the member entered the household as the start date.
    c. Go to the Verifications folder and verify any outstanding evidence
    d. Check Eligibility. Eligibility Check tab → Check Eligibility (*NOTE* The eligibility check result with the added household member will sometimes show in the changed decision tab, if there is a changed decision)
    e. Apply changes. Evidence Dashboard → Page Actions Menu → Apply Changes
    f. Accept Changed Decisions, if any. Eligiblity Checks Tab → Changed Decisions: Accept Changed Decisions
    g. Go to the PDC groups tab to make sure the client is part of the assistance unit
    h. Check the Determinations tab to ensure the client shows up with the correct start date and that the household monthly allotment reflects the added household member