

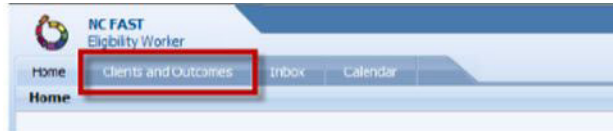
Searching for Cases

Purpose

To search for existing cases.

Steps

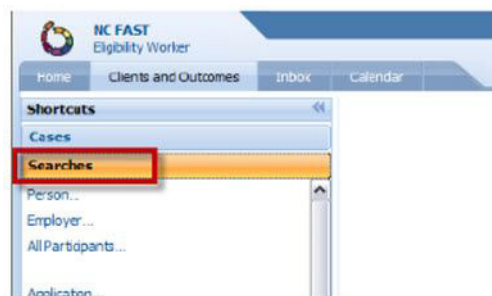
1. On the NC FAST page, click the **Clients and Outcomes** tab.



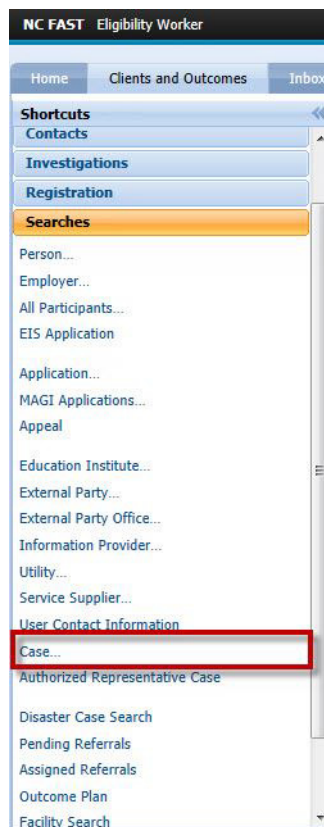
2. The Clients and Outcomes page displays. Click the Shortcuts panel **toggle**.



3. The Shortcuts panel expands. Click the **Searches** folder.



4. The Searches folder displays. Click the **Case** hyperlink.



5. The Case Search page displays. Enter and select applicable search information then click **Search**.

 The screenshot shows the 'Case Search' page. At the top, there are tabs for 'Person Search', 'judy Jubilee', and 'Case Search'. The 'Case Search' tab is active. Below the tabs is a 'Case Search' header with icons for print, save, and help. A note indicates '*required field'. The 'Search Criteria' section includes:

- Reference: A text input field.
- Client Reference: A dropdown menu with 'Reference Number' selected.
- Case Name: A list box with options: 'ABD with Cap Spend Down', 'Aged, Blind and Disabled', 'Aged, Blind, and Disabled Medicaid', and 'Aged, Blind, and Disabled Medicaid with PACE'.
- Status: A list box with options: 'Active', 'Approved', 'Closed', and 'Open' (which is selected).
- Start From: A text input field.
- Start To: A text input field.
- End From: A text input field.
- End To: A text input field.

 Below the search criteria is a section titled 'Search Results will only include cases with' with checkboxes for 'Appeals', 'Issues', 'Investigations', and 'Service Plans'. At the bottom, there is a 'Search' button (highlighted with a red rectangle) and a 'Reset' button.

Participant Note: The case Reference or Client Reference, Reference Number, are required fields for case searches.

Participant Note: When using a client's Social Security Number to search for a case, select **Social Security Number** in the Client Reference field. In the Reference Number field, enter the applicable SSN (do not use any dashes or spaces) then click **Search**.

6. The search results display. Click the applicable **reference** hyperlink.

The screenshot shows the 'Case Search' interface. At the top, there are tabs for 'Person Search', 'Judy Jubilee', and 'Case Search'. Below the tabs is a 'Case Search' header with a search icon, a print icon, and a help icon. A note indicates that fields with an asterisk are required. The 'Search Criteria' section includes a 'Reference' field with the value '900028214'. The 'Client Reference' dropdown is set to 'Reference Number'. The 'Case Name' section has four checkboxes: 'ABD with Cap Spend Down', 'Aged, Blind and Disabled', 'Aged, Blind, and Disabled Medicaid', and 'Aged, Blind, and Disabled Medicaid with PACE'. The 'Status' section has four checkboxes: 'Active', 'Approved', 'Closed', and 'Open' (which is checked). There are also 'Start From', 'Start To', 'End From', and 'End To' date pickers. Below the search criteria, a section titled 'Search Results will only include cases with' contains checkboxes for 'Appeals', 'Issues', 'Investigations', and 'Service Plans'.

7. The case page displays.

The screenshot shows the 'Income Support - 900028214' case page. At the top, there are tabs for 'Person Search', 'Judy Jubilee', 'Case Search', and 'Income Support - 900028214'. Below the tabs is a header with the case title and an 'ACTIONS' button. On the left, there is a profile card for 'Judy Jubilee' with a pink icon and the text 'Primary 31 years'. To the right of the profile card is a list of 'Open' items: 'Items To Verify (0)', 'Evidence In Edit (0)', 'Undisposed Applications (0)', and 'Recommendations (0)'. Below the profile card is a section for 'NCFast USER57022'. The main content area has a navigation bar with tabs: 'Home', 'Evidence', 'Eligibility Checks', 'Compliance', 'Participation', 'Time Limits', 'Case Details', 'Administration', 'Online Data', and 'Assessments'. The 'Home' tab is selected. Below the navigation bar, there is a 'Home' section with fields for 'Start Date' (6/4/2013), 'Priority', 'Comments', 'Owner' (NCFast USER57022 [Change...]), 'Classification' (Medium Risk), and 'County' (Orange). Below this is a 'Programs' section with a table showing the case details.

Case Reference	Primary Client	Program	Coverage Type	Expected End Date	Status
900028229	Judy Jubilee (31)	Presumptive Medicaid	Presumptive Medicaid	6/30/2014	Approved

Participant Note: Workers can use the My Case Queries shortcut link to create queries for their cases that have been closed over a certain time period.

Related Procedures

Searching for Persons

Searching for Applications

Searching for Cases Associated with FNS Authorized Representative