![NC FAST logo - North Carolina Families Accessing Services through Technology]

Energy – Low Income Household Water Assistance Program (LIHWAP) Application to Case

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Overview

This job aid describes how to complete a Head of Household's first Energy LIHWAP application in NC FAST. Only one application is needed for Federal Low Income Household Water Assistance Program (LIHWAP) funds; NC FAST is programmed to determine the funding source. An Energy application is created when the Guided Interview is completed and submitted.

Refer to the *Energy – CIP Application to Case, Energy - CIP & LIEAP Combined Application to Case, Energy - LIEAP Application to Case & Energy - Subsequent Energy Assistance Application, Energy – Overpayment and Underpayment* job aids, if needed.

Notes:

- For categorically eligible cases, answer, "NO" to applicable questions

- Make a note on the application to state that the application is either a "*Categorically Eligible Priority 1 or 2 Application.*"

- To add case notes, complete the following steps (refer to Application section, 23. Add case notes below for additional assistance):
  a. From the Energy Application page, click the **Contact** tab.
  b. Select **Notes**.
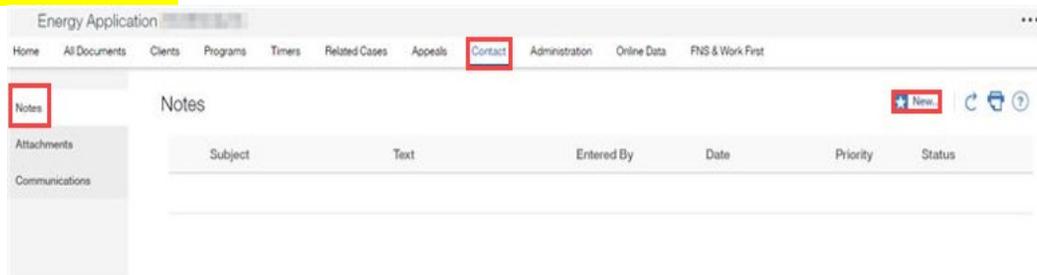
  c. Then click the **New** hyperlink.
  d. The New Note pop-up appears. Enter the applicable information then click **Save**.

Step-by-Step Instructions

It is critical to perform a thorough Person Search in NC FAST for everyone included on the application. This will help prevent duplicate person registrations and incorrect eligibility determinations.

1. Search NC FAST for each household member to see if they are already registered in NC FAST. Refer to *Searching for Persons* job aid.

2. If any household member is not registered in NC FAST, register them before continuing the application process. Refer to *Registering Persons* job aid for detailed instructions.

3. Review each household member's Person page for accuracy, and whether they were previously registered. Update Person page information as necessary.

   Notes:

   - This step should occur before starting any Energy application; Person page updates will not transfer to an in-progress Energy application. Refer to the *Editing Person Information* and *Adding Addresses* job aids.

   - Energy Applications and Cases are based on the Head of Household Private Address, where the client resides, which indicates the location requiring heating or cooling. A Mailing Address is not required for Energy cases and will not transfer to the Energy Assistance application. If the Mailing Address

exists, on the person page or the Energy Assistance Integrated Case, it will be printed on all Energy Assistance notices.

- Address processing for Eligibility User Roles is the same. If evidence needs to be added users can end date an existing Private Address and add a new record. Do not delete any existing evidence on Person page.

- Keep the Head of Household's Person page open. This is where the Energy worker begins the Head of Household's initial Energy application.

Search for Prior Energy Benefits

4. Perform an Energy Benefits Search to determine whether the Head of Household previously received Energy Assistance benefits in NC FAST

5. From the NC FAST home page click the **Clients and Outcomes** tab then click the **toggle** to expand the Shortcuts panel.

6. The Shortcuts panel displays. Click the **Searches** folder.

7. The Searches folder expands. Click the **Energy Benefit** hyperlink.

8. Enter the search criteria for the Head of Household then click **Search**.

9. Search results display. Click the **toggle** next to any result that says Yes in the Head of Household column. Information about Energy benefits received displays.

Notes:

- If the Head of Household column contains Yes, determine the type (and amount) of Energy assistance already received. If the Head of Household column reads *Yes* and the client is still eligible for LIHWAP benefits (whether in the current fiscal year), 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 displays 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.

- This message will display after the search criteria is entered. This benefit information may not be a true reflection on the household's available benefit. Please check the applications under the Applications tab for the household to confirm actual benefits available.

Initial LIHWAP Application

1. Navigate to the Head of Household's Person page. Click the **Application** tab.

2. The Applications page displays. Click the **New Application** hyperlink.

3. The New Application pop-up appears. Select the **Low Income Household Water Assistance Program (LIHWAP)** check the box then click **Next**.

4. The Guided Interview wizard opens (on the About the Claimant page). It is divided into several sections. Enter or select the applicable information on each page.

About The Claimant

5. Information About the Claimant: Enter or select the applicable information then click **Next**.

Notes:

- An asterisk (*) indicates required information. Some required information (like Race and Ethnicity) is not always marked with an asterisk. After entering or selecting all mandatory information on a Guided Interview page, click **Next** to progress to the next page.

- If an Energy worker does not enter or select an answer to a required question, clicking **Next** generates a validation message that lists the information that must be supplied to progress further. Enter or select answers to those questions then, click **Next**.

- When the application progresses successfully to the next page, NC FAST automatically saves all information entered on the previous page. The Energy worker can click **Close** (at bottom left) at any time to end the Guided Interview. The next page allows the worker to choose whether to save the application and continue later (In-Progress status) or quit/delete.

6. Suggested Addresses: Select the applicable information then, click **Next**.

About The Claimant

7. About the Claimant (Claimant Details): Enter or select the applicable information then click **Next**.

Notes:

- Does the person have an SSN? is a required field. Select **Yes** if the Head of Household has an SSN. The Head of Household's SSN then appears in the field below (if SSN evidence has been added to the Head of Household's Person page).

- Select **No** if the Head of Household (an ineligible alien, for example) does not have an SSN. Select **N/A** for *Has the claimant applied for an SSN*?

- Selecting **Yes** to *Is this person disabled*? Will trigger NC FAST to apply the $85 medical deduction (if SSI is chosen as the client's Benefit income type later in the Guided Interview).

- If someone other than the Head of Household or a Household Member is applying for Energy Assistance on behalf of the household, select **Yes** for *Is someone other than a Household Member applying for the household?* then enter the representative's first and last names in the fields that then appear.

The Claimant's Home

8. Water and Wastewater Information (The Claimant's Home): Enter the applicable information then click **Next**.

Notes:

- All fields are required on the Water and Wastewater Information page.
- On the Water Crisis Information page, describe the crisis (minimum of 20 characters).

9. Water Provider Search (The Claimant's Home): Enter the applicable information then click **Next**.

Notes:

- All fields are required on the Energy Provider Search page.

- When the Energy worker enters a minimum of two consecutive characters found in a Water provider's name (in the Water Provider Name text field), any enrolled provider with those consecutive letters in its name, appears in the search results.

- If a Water provider does not appear in the search results, contact a supervisor, or lead worker for guidance. They may need to contact the Water provider so that they can submit this information in the Energy Provider Portal.

- On the Select Water Provider screen, a provider must be selected.

10. Water Provider Details (The Claimant's Home): Enter the applicable information then click **Next**.
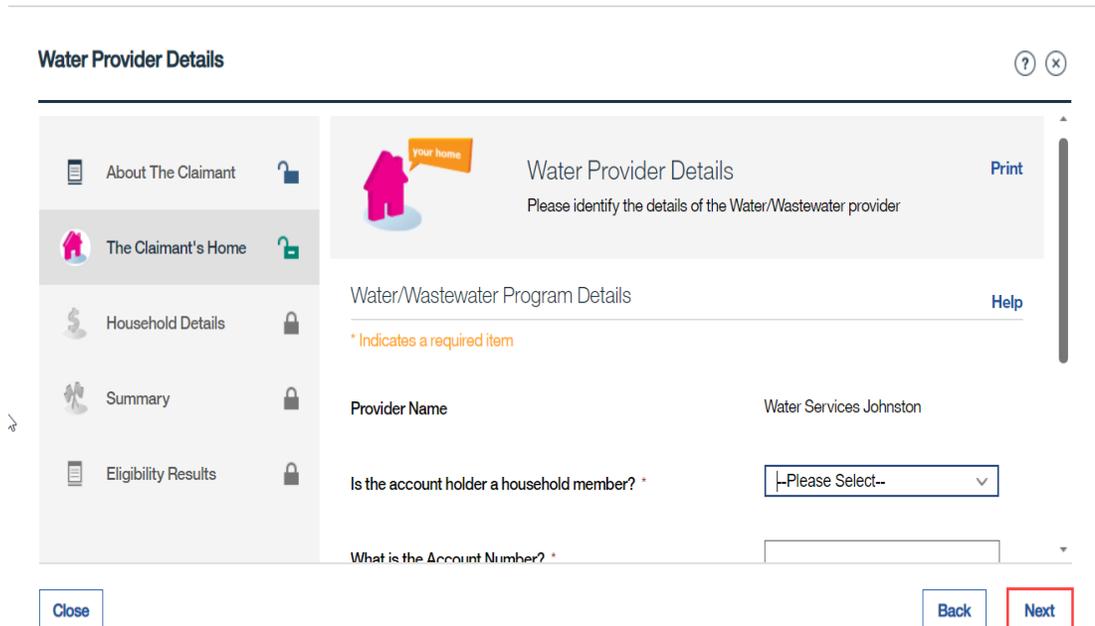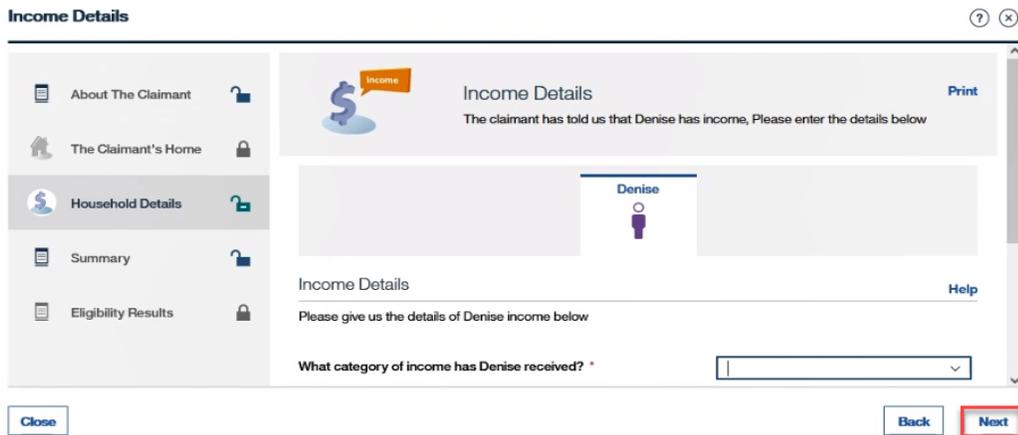

Notes:

- All fields are required on the Energy Provider Search page.

- On the Water Provider Details screen, the benefit amount cannot exceed the amount needed to alleviate the crisis.

Household Details

11. Income Details (Household Details):Select the applicable information then click **Next**.


Notes:

- If Yes is selected from any of the drop-down menus, select the Head of Household's name radio button.

- Add income for all household members. LIHWAP requires current-month amount for these fields.

- NC FAST classifies some sources of income as Benefit Income instead of Unearned Income. For example, Social Security Income (SSI) is Benefit Income, not Unearned Income.

Summary

12. Review the Claimant's Answers: Confirm all the information is accurate then click **Next**.
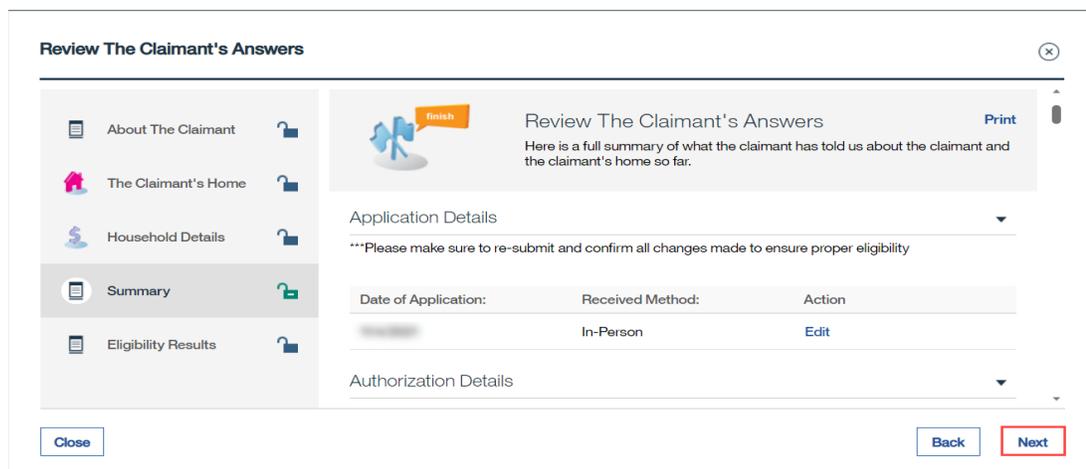
Note: The Review the Claimant's Answers page summarizes all information entered on the Guided Interview. Review this page thoroughly. Edit, delete, and/or add information as necessary on this page.

Eligibility Results – Water or Wastewater

13. Eligibility Results – Water or Wastewater: Review all information to make certain the eligibility determination matches expectations then click **Next**.

Claimant's Rights and Responsibilities

14. Claimant's Rights and Responsibilities: Select each check box then click **Submit**.

    Note: Energy workers can click any hyperlink on this page and print it in either English or Spanish. Each opens in another window as a PDF document. Closing the PDF returns the Energy worker to the Guided Interview's Rights and Responsibilities page.

Application

15. The Application tab on the Head of Household's Person page displays. Click the reference number hyperlink for this application.

    Note: The application status must display as *Submitted* for the reference number to become a hyperlink. Click the **refresh** icon to update the application status to *Submitted.*

16. The Energy Application home page displays. Click the **Clients** tab to confirm that NC FAST has matched all household member information entered on the Energy

application with information (name, SSN, date of birth) that appears on each household member's Person page.

a. A list of household members included on this application displays. A status of *No* in the registered column indicates that the person's name, date of birth, and/or SSN as entered on the application does not match these same details on their Person page.

b. For each household member with *No* in this column, click the **List Actions Menu** then select **Match Client** or **Potential Match**. Refer to the *Match Client* job aid for guidance on completing the Match Client process.

c. After successfully completing the Match Client process, *Yes* should now appear in the Registered column for every household member.

    Note: NC FAST automatically matches name, SSN, and date of birth (Status = *Yes*) if what is entered on an application matches this same information on the Person page.

17. Click on the **Online Data** tab to check multiple online databases that might verify evidence included on the application.

    Notes:

    - Refer to the Requesting and Viewing Online Data OVS job aid.

    - Review information thoroughly and make note of any OVS results that do not match the details recorded during the Guided Interview.

18. Click the **FNS & Work** First tab to view any income, resources and/or expenses used to determine a household member's eligibility for active Food & Nutrition Services (FNS) or Work First/Cash Assistance case. Note any details that affect the household's Energy Assistance application.

19. If either OVS results or information found on the FNS & Work First tab indicate that evidence or verification source needs to be edited/updated on the Guided Interview:

a. Click the **Tab Actions Menu** then select **Edit Application Information**.

b. The Summary page of the Guided Interview pop-up appears. Select **Edit, Delete**, or **Add** (if available) for any section of the Summary page to change information recorded earlier on the Guided Interview.

    Note: Selecting Delete removes the information from the application immediately. Selecting **Edit or Add**, opens the relevant page of the Guided Interview. When the page displays:

c. The Eligibility Results page displays. Review the eligibility results then click **Next** if satisfied with the results.

   Note: Clicking back in the browser returns to the Summary page.

d. The Update Application pop-up appears.

   i. Click **Confirm** for NC FAST to use the changes made on the Guided Interview to reassess eligibility.

   ii. Click **Cancel** to return to the Summary page.

20. On Energy Application page, authorize or deny the application.

   a. To authorize the application:

      iii. Click the **Tab Actions Menu** then select **Authorize Program.**

      iv. The Authorize Program pop-up appears. Select the applicable **check box** then click **Authorize**.

   b. To deny the application:

      i. Click the **Contacts** tab to add case notes to substantiate denying the application.

         Note: Case notes can only be added to an Energy application before the application is disposed.

      ii. Click the **Notes** folder then select the **New Note** hyperlink.

      iii. Enter a Subject and notes then click **Save**.

   c. Click the **Programs** tab to deny the application.

      i. Click the **List Actions Menu** then select **Deny.**

      ii. The Deny Program Request pop-up appears. Select the **Denial Reason** from the drop-down menu, add comments then click **Save**.

21. Print the approval or denial notice:

   a. Click the **Contacts tab** then click the **List Actions Menu** associated with the notice.

      Note: The approval/denial notice is also accessible on the Head of Household's Person page (Contact tab > Communication folder).

   b. Select **View/Print**. The DSS 8105 approval or denial program notice opens as a PDF file.

Note: Depending on the web browser used, the notice may open automatically in a new browser tab, or it may download (in which case it must be opened manually).

    c. Check it for accuracy. Print then close the PDF file.

    d. The Contacts page on the Energy Application displays. To update the notice's status from *Draft* to *Sent*:

        i. Click the **List Actions Menu** then select **Edit**.

        ii. Click the **Status** drop-down then select **Sent**.

        iii. Click **Save**.

22. View the Pledged Payment Status:

    a. Navigate to the Energy Application page then click the **Programs** tab.

    b. Click the **toggle** next to the Program to review details.

23. Add case notes:

    a. Click the **Related Cases** tab.

    b. Click the **reference number** hyperlink.

    c. The Energy Income Support Case displays. Click the **Case Details** tab.

    d. Click **New**.

    e. The New Note pop-up appears. Enter and select the application information then click **Save**.

    f. The Energy Income Support page displays.