



Job Aid: Scheduling an Interview

Overview

Income Support Application pages include an Interview tab, providing caseworkers with quick access to scheduling interviews to determine and/or finalize a client's eligibility for assistance. The Interview tab is not available for MAGI applications.

The Calendaring function in NC FAST is provided to assist caseworkers in scheduling appointments, interviews and other needed case activities.

Scheduling an Interview for an Application:

Step-by-Step Instructions

1. From an NC FAST Income Support Application page, click the **Interviews** tab.
2. The Interviews page displays. Click the **New** hyperlink.
3. The New Interview pop-up appears.
 - a. **Subject:** Enter subject
Note: The information you enter in the subject field appears as a hyperlink on your calendar.
 - b. **Location:** type applicable information
 - c. **Start:** Select date and enter time
 - d. **End:** Select date and enter time
Note: NC FAST uses a 24 hour time clock; i.e., 14:00 is 2:00 pm.
 - e. **Priority:** Select from drop-down menu
 - f. **Notes:** Enter any additional pertinent information
 - g. **Invite Client:** Check box beside appropriate client(s)
Note: This field only identifies applicable client. It does not send an electronic invitation to the client.
 - h. **Invite Users:** Check box beside appropriate user(s)
 - i. Click **Save**
4. The Interview displays on the Interviews page with a Scheduled status.
 - a. To change the interview status, click the **List Actions Menu** icon and select appropriate option.
Note: FNS applications require the following status changes:



- i. Select **Complete** when an interview has been completed
- ii. Select **Cancel** when an interview has been postponed/rescheduled
- iii. Missed interviews should remain in **Scheduled status**

Note: Accurate FNS interview status is important. Interview status determines which denial reason will appear on the DSS-8551.

Note: Click the toggle to display more interview details.

Note: NC FAST automatically shows you as an attendee.

5. To generate an application notice if required; click the **Contacts** tab.
 - a. The Communications page displays. Click the **List Actions Menu** then select **New Pro Forma**.
 - b. The New Pro Forma Communication wizard appears.
 - i. **Correspondent:** Choose **Application Participant** from the drop-down menu
Note: Only one participant is required for NC FAST to create a communication. Additional correspondents can be selected from **Participant** drop down menu or typed in the available **Correspondent** field.
 - ii. **Regarding:** Choose **Client** from the drop-down menu
 - iii. Click **Next**
 - iv. **Type:** Select **Notice**
Note: Select **Missing Information** for DSS- 8650 or DSS-8146A
 - v. Click **Search**
 - vi. Click **Select** beside the desired Pro Forma Type
 - vii. **Select Address:** Select address from drop-down menu
Note: For an alternative address type information in available fields
 - viii. **File Location:** optional field
 - ix. **Document Location:** optional field
 - x. **File Reference:** optional field
 - xi. **Document Reference:** optional field
 - xii. **Comments:** Add additional information/documentation
 - xiii. Click **Save**
 - xiv. Click **Spell Check** (optional)



- xv. Click **Save**
6. The notice displays on the Communications page.
 - a. Click the **List Actions Menu** then select **Preview**

Note: A PDF copy will download to your desk top. This copy can be mailed or given to correspondent(s).
7. Change the communication status to Sent.
 - a. Click the **List Actions Menu** icon beside the appropriate form and select **Edit**
 - b. The Edit Pro Forma Communication pop-up appears
 - c. From the Communication Status drop down, select **Sent** then click **Save**

Scheduling an Interview for a Case:

Step-by-Step Instructions

1. On the NC FAST Home page, click the **Calendar** tab.
2. The Events page displays in Calendar View.
3. Click the **Page Actions Menu** and select **New Activity**.
4. The New Activity pop- up appears.
 - a. **Subject:** Enter subject
Note: The information you enter in the subject field appears as a hyperlink on your calendar.
Note: Use CA Review or FNS Review followed by the case number to easily identify interviews.
 - b. **Location:** Click the **magnifying glass** and select applicable Location Name from Location pop-up
 - c. **Priority:** Select from drop-down menu
 - d. **Ignore conflicts:** Check box if you want to disregard conflicting appointments on the calendar
 - e. **Start:** Select date and enter time
 - f. **End:** Select date and enter time
Note: NC FAST uses a 24 hour time clock; i.e. 13:00 is 1:00 pm.
 - g. **All Day:** Check box if this is an all-day event
 - h. **Show As:** Select from drop-down menu
 - i. **Client:** Select from drop-down menu and click the **magnifying glass** to enter applicable information in the Person Search pop-up
 - j. **Recertification Interview:** Click box if applicable



- k. **Case Reference:** click the **magnifying glass** to enter applicable information in the Case Search pop-up
 - l. **Comments:** Enter any additional pertinent information
 - m. Click **Save and Invite**
5. The Invite Attendee pop-up appears.

Note: NC FAST automatically shows you as an attendee. Everyone else will have to be invited via the Invite Attendee pop-up.

 - a. **Attendee:** Click the **magnifying glass** icon and enter applicable information in the User Search pop-up
 - b. **Ignore Conflicts:** Click box to override any conflicting appointments
 - c. To invite additional attendees click **Save & New**, otherwise click **Save**.
6. The new activity displays as a hyperlink on your calendar.

Note: Click the calendar hyperlink to view activity details.
7. If a notice or letter is required, refer to steps 5 through 7 above in the Scheduling an Interview for an Application steps.