Person Page Clean-up Checklist

What is Person Page Cleanup?

You will need to complete cleanup of the Person Page for each individual on a case to ensure that all of the information on a case is accurate and up-to-date. This should be the first step when you start working on a case and will help you catch any issues or missing information that should be added to the case. Complete the following tasks at every recertification, before a transfer, and before placing a help ticket.

> **Best Practice**: Open 2 browsers with NC FAST and the case you are working on; this allows you to copy and paste any information you may need.

> **Reminder**: ALWAYS TYPE NOTES IN NC FAST USING CAPITAL LETTERS.

Edit Person

Basic information about a person is included on the *Home Tab* of the Person Page, but you cannot edit the information.

1. To make changes, click the three dots, then click **Edit**. You can now edit the basic person page information. Check that the following sections are correct:
   - **Registration Date**: Enter the registration date; this should be the date of birth or date client became eligible to receive benefits.
   - **Preferred Office**: Select the preferred office, such as *Henderson County*.

   > **Note**: If you are completing a county transfer, change this to the county that the client is moving to.

   - **Currency**: Select the currency, such as *US Dollar*.
   - **Method of Payment**: Select the method of payment, such as *EBT Card.*
   - **Marital Status**: Select the marital status, such as *Married*, *Single*, *Separated*, etc.
   - **Race**: Select the race; this field cannot be left as Unknown/Unreported.
   - **Ethnic Origin**: Select the ethnic origin from the dropdown; this field cannot be left Unknown/Unreported.

Evidence Tab

More specific information about a person is included in the Evidence Tab of the Person Page.

2. Click **Evidence Tab**, then **Evidence** to access the information.
3. When you are cleaning up the *Evidence Tab*, make sure to check the following:

   > **Important**: Never edit another department's evidence, such as SDX addresses, FNS, Institution, etc.

   - **Address**: Addresses must be typed in all caps. Edit the address if necessary.
     - Mailing addresses must have the *Primary* checkbox marked; if they are using a PO BOX, then the mailing address would not have a matching private address, which is ok.
     - Must have a private address. If mailing and private addresses are the same, you must still enter it as a private and mailing address.
     - Make sure there are no gaps or overlapping dates in the addresses, such as when the client has moved to a different address.
     - Rented addresses would need to be changed to mailing and private.
   - **Contact Preferences**: Make sure contact preferences (Spoken, Written, and Communication) are included.

- **SSN**: If the client has a social security number, then the Primary checkbox should be marked.
    - When you toggle in, click **Edit**, and make sure that Primary is checked.
- **Phone number**: Only one phone number should be active at a time.
    - Under *Phone Type*, always select **Personal**; do not select **Mobile** number.
    - Make sure there are no symbols, dashes, spaces on phone numbers.
- **Date of Birth/Gender**: Always check that date of birth and gender are entered correctly. Start dates should not be before the client's date of birth.

4. When you are finished with the Evidence Tab section, check that there is no evidence to verify by clicking **Verifications**.
    - Make sure all evidence shows **Verified**; If one is not verified, then add proof of how evidence was verified.
5. You've now successfully completed Person Page cleanup.