Streamlined (MAGI) Application

Study Guide

Scenario:

A father and his son have applied for medical coverage. The mother has returned to Germany to live, therefore the US has no jurisdiction and no absent parent information would be necessary. The father is a legal permanent resident and the son is a US Citizen. Please note, the application was signed on May 19, 2015.

During this case study, the Streamlined (MAGI) Application should be completed using the information obtained from the client and found in the application packet. In addition to the application packet, we will refer to Job Aids, Procedures, Weekly Troubleshooting Tips, and WBTs related to this activity.

Key Job Aids

- Streamlined Application to Case & Key Differences Checklist Job Aid
- Streamlined or Traditional Application Decision Tool
- Completing Person Merge Wizard
- Registering Persons
- Verifications (Updated 4-24-2015)
- Streamlined Medical Assistance Evidence Verification Items and Levels Job Aid
- NC FAST Postcard
- P7 Medical Forced Eligibility (MAGI)
- Video Troubleshooting Tips:
  - Troubleshooting: Matching Clients
  - Troubleshooting: Working with MAGI Evidence
  - Troubleshooting: Legal Aliens on MAGI Applications
  - Troubleshooting: IV-D Referrals on Income Support and MAGI Cases

Step-by-Step Instructions

1. **Complete a person search for each member of the household. A minimum of four searches per person should be done in NCFAST to ensure a thorough search.**
    a. Job Aids: Streamlined Application to Case and Key Differences Checklist, Completing Person Merge Wizard
        1) First Name, Last Name, Gender
        2) First Name, Last Name, Gender, DOB
        3) Social Security Number, if the client has one
        4) Partial Name Search, Gender

Instructor Note: Review client information: does the client have an active case in P2/6, P7, or any current benefit history? Does the client have any other pending applications?

Instructor Note: Please note, on MAGI and now on Traditional applications, ALL HH Members need to be fully registered prior to starting an application. Make sure to emphasize the importance of this process (i.e., Help Desk suggests that, even if in the midst of an application, one stops to register all HH Members).

2. **Register Persons**
    a. Job Aid: Registering Persons

3. **Start MAGI Application and then Submit MAGI Application**
    a. Always start application on the Person Page of the Head of Household.
    b. Complete all sections of application that pertain to the household.
        i. Pay close attention to the citizenship information found in our case study.
        ii. There are many fields within the Alien information evidence. Complete as many fields as possible based on what you have in the case packet. The

'Date Alien Status' field would need to be filled out for the five year bar rules to work.

Instructor Note: If the HOH is not applying for coverage, the application still begins on the Person Page of the Head of Household. See the **6/2/2014** Postcard for additional assistance.
This is important so notices are addressed properly and the correct case head is established, just like they used to do in EIS.

Instructor Note: For additional assistance refer to Streamlined Application to Case and Key Differences Checklist.

Participant Note: Absent Parent and child support information is now required ONLY post application. Therefore, even though the question is on the IEG, you should not enter any Absent Parent information on the application. The question is there to generate a form (request for absent parent info.) It's not associated with any evidence related to child support. This question can be answered if the form needs to be generated (if information on absent parent is unknown). This information should be captured via evidence only after the application is authorized and the PDC is created.

4. **Find Match (MAGI Key Difference)**
   a. **DO NOT proceed if you have not already searched and/or registered ALL members of the household.**
   b. Refer to page 2 of Streamlined Application to Case and Key Differences Checklist.

Participant Note: On the Find Match search screen, you will need to remove the reference number to conduct your search

Instructor Note: Refer to 1-31-14 Matching Clients video. Maybe even play the video for the class if time permits.

5. **Review and Update Evidence**
   a. Most evidence will be created from the IEG, so there should be very little evidence management to be done. There are two ways to create an application; ONE is through the online IEG. This method is recommended only for “new” households (aka households which are not associated with an active P7 integrated case. The SECOND method (preferred for existing households) is by using “add application case” and then adding members to the application case, which then pulls their evidence over from their integrated case. This second method should be used when adding a member to a household, or for situations where a product has terminated and the household is reapplying months after the fact. Where is the second process outlined? We recommend not using the online IEG for reapplications, adding members, etc. as it duplicates evidence
   b. Things that **<u>might</u>** need to be edited or added:
      i. Managed Care
      ii. Application Filer Consent (Need to be on Each Person in Household)
      iii. Pregnancy Base Period Income (if applicable)
      iv. DHSID Details (For Legal Aliens)
         1. Fill in “Date Alien Status Granted” Field
         2. Fill in “Date of LPR Entry” Field
         3. Fill in “Date of Expiration” Field
         4. Fill in “Start Date” (Date of Application) Field
         5. Fill in “Date of Birth” Field

Instructor Note: A key difference between traditional and P7 application is minimal evidence management needs to occur if the application is completed correctly during the IEG.

Instructor Note: Toggle into the Tax Filing Status and Tax Relationships PRIOR to updating those pieces of evidence (the Help Desk has seen many instances of these pieces being deleted and then having to be re-entered).

6. **Request Online Data**
   a. In order to run OVS, Application Filer Consent evidence for all HH Members must be present.

Instructor Note: If class has questions about OVS and which system to use – refer to MPR.

7. **Add Manual Verifications**
   a. Use verifications provided by client.

Instructor Note: The job aid Streamlined Medical Assistance Evidence Verification Items and Levels refers to the necessary verification levels. The Verifications job aid refers to how Verifications can be added to evidence in two ways: individually or using new functionality for adding multiple verifications Multiple verifications has not been released for MAGI yet. This is only available on income support cases. (Updated 4-24-2015)

8. **Check Eligibility**
   a. Check Eligibility from the Tab Actions Menu OR Eligibility Tab on Navigation Bar (Key Difference from Traditional Applications)
   b. Make sure to toggle the eligibility results to ensure you are getting the correct decision

Participant Note: Key difference from traditional applications: There is no decision summary to view at this time. When you toggle the eligibility check, you will see information in regards to what program client is eligible for. If ineligible, you have to click on the ineligible tab to review why they failed in regards to Financial information and/or Non-Financial information. This will help you to determine why a person or household is being found ineligible. You may need to run a manual budget outside NC FAST to help you determine if the application should be eligible.

Instructor Note: MAGI may be new to some CWs. Instructors may need to spend a little time looking over the eligibility check with the class.

9. Troubleshooting

a. If you receive an incorrect eligibility decision, there are a few things you can look for:
    i. Check that all HH Member information is correct and all income is entered correctly
    ii. Check evidence verification levels. Refer to the Streamlined Medical Assistance Evidence Verification Items and Levels job aid in FAST Help Evidence verification levels have no effect on check eligibility. When anything less than an acceptable level is entered as a verification, that evidence will not be recorded as 'verified'. Users will be unable to authorize in that case.
    iii. If the intended person(s) are not showing as eligible, make sure they are selected as applying for coverage on the Application Details evidence
    iv. If the applicant is a documented alien, and is not showing as eligible, check DHSID Details for "Date Alien Status Granted"
    v. Review client information: does the client have an active case in P2/6 or P7?

10. Authorize OR Deny the application

- Authorize (Tab Action Menu)

i. Ensure you get an active PDC on the Insurance Affordability Case

ii. Check Benefit History for each eligible person.

- Deny (Programs Tab)
  i. Key difference from traditional applications: denial of a MAGI application is done on the Programs tab.
  ii. Refer to the postcard dated 6/2/2014 for a list of denial reasons that will trigger a transfer to FFM.

ii. The reason "Administrative Denial" should be used for things like 'keyed in error' or 'need to rekey' as this will not generate a notice.

Instructor Note: The notices cannot be automated until CWs stop putting inappropriate messages in the comments.

Instructor Note: Client is ineligible – we will deny this application as the client is over income.
