



Adding or Editing Medical Assistance (MA) Authorized Representative Evidence

Last Updated: 10/14/2024

Overview:

This job aid describes the steps on how to add Authorized Representative (AR) information for a Medical Assistance (MA) client and how to add verifications on the beneficiary Person page.

Note: Add the Authorized Representative's information on the beneficiary's Person page.

Note: The Authorized Representative will need to be on the Person page so information will be transmitted to downstream interfaces.

- NC FAST creates an Authorized Representative Contact on the Client Contact tab of the Person page during the Guided Interview when the caseworker records that the applicant is applying on behalf of someone else.
- Caseworkers may learn before disposing an application, they need to add an MA Authorized Representative manually (or edit the contact record that was added earlier).
- At recertification or change of circumstance, the caseworker may need to add or edit the Client Contact on the Person page.
- Always search for the Authorized Representative — and register her/him, if necessary — in NC FAST. Refer to the *Searching for Persons* and *Registering Persons* job aids for additional guidance.



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Note: When an Income Support Application (ISA) for Medicaid or Insurance Affordability Application (IAA) is denied, and any individual on the case has a MA Authorized Representative on the Person page under the Contacts tab, the system will generate an 8109 or 8109H to the primary client and another 8109 or 8109H will be sent to the MA Authorized Representative. All other notices sent to the MA Authorized Representative will need to be manually sent by the caseworker.

Note: Denial notices will be sent to the following:

- Primary Case Head
- Client Contact(s) of the Primary, this notice will include denials for the Head of Household
- To the Client Contact(s) of an individual on the application, if the individual's client contacts are different from the primary's client contact. Notices sent to the individual's client contacts will only include denial information of the individual

Note: If an application is denied, and verifications are not verified, caseworkers will receive an Informational message indicating an outstanding verification for an Authorized Representative record

Note: When another member (non-primary) on the case has an Authorized Rep indicated, a new 8109/8109H will be sent with only that member's details on it and sent to their Authorized Rep.

Note: Adding a new type of Client Contact (Power of Attorney, Health Care Power of Attorney, or Authorized Representative), workers will need to add verifications for these contacts on the Person Page > Evidence tab > Verifications folder.

Note: Existing/Active MA Authorized Representatives evidence will be copied over to the Person Page > Client Contact > Authorized Representative and will be read only.

Note: If you try to add a CAP Case Manager and a PACE Case Manager as Authorized Representative during the same time, the system will not allow and will give you an error message.

Note: All new applications will map the Authorized Representatives to the Person Page, to the Client Contact tab and then verifications will need to be added to the Person Page > Evidence tab > Verifications folder.



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- When the Primary person or other Household (HH) member has an active non end dated Person, you view the Client Contact Records.
- The system will consider the non-primary's Client contact if it's different from the Primary clients contact record.

Note: The system will check if the primary person (case head) or another applicant on the Income Support Application or Insurance Affordability Application case has an active (non-end dated or end dated in the future) Person-> Client Contact of the following types:

- Department of Prisons
- Power of Attorney (Requires mandatory verification)
- Health Care Power of Attorney (Requires mandatory verification)
- Department of Social Services
- Authorized Representative (Requires mandatory verification)
- Authorized Representative designated by SSA
- 'CAP Case Manager' or 'PACE Case Manager'
- Parent
- Spouse
- Legal Guardian

Generate 8109(H) to the Primary Persons' Client Contacts

- The system will generate an 8109, 8109H or 8109A to all primary person's Client Contacts listed above. If there are multiple Client Contact records of the same type, the system will generate a notice to each. This notice will include the denial/withdrawal information for the entire Household

Generate 8109(H) to other household members Client Contacts

- When the non-primary person on the application case has an active non-end dated or end dated in the future Person, the Client Contact records (Types listed above) with no outstanding verification items (those that require a mandatory verification), the system will generate another 8109, 8109H or 8109A with only that member's details on it and send it to their contact

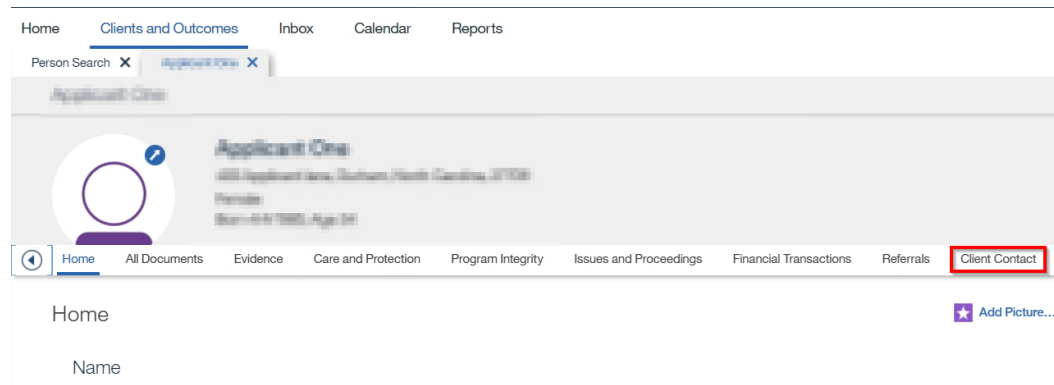
Step-by-Step Instructions

Add MA Authorized Representative to Person Page

1. Navigate to the MA recipient's Person page.

Note: For steps to access a Person page, refer to the *Searching for Persons* job aid.

2. The Person page displays on the Home tab. Click the **Client Contact** tab.



Home Clients and Outcomes Inbox Calendar Reports

Person Search X Applicant One X

Applicant One

Applicant One
100 Applicant Ave., Durham, North Carolina 27701
Female
Born: 01/01/1980, Age: 34

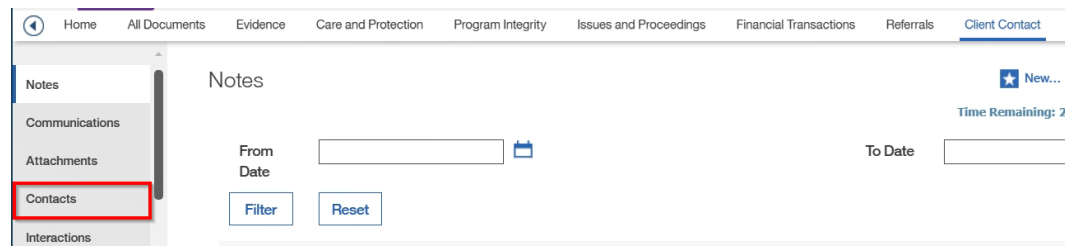
Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings Financial Transactions Referrals **Client Contact**

Home

Name

Add Picture...

3. The Notes page displays. Click the **Contacts** folder.



Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings Financial Transactions Referrals Client Contact

Notes

Notes

From To Date

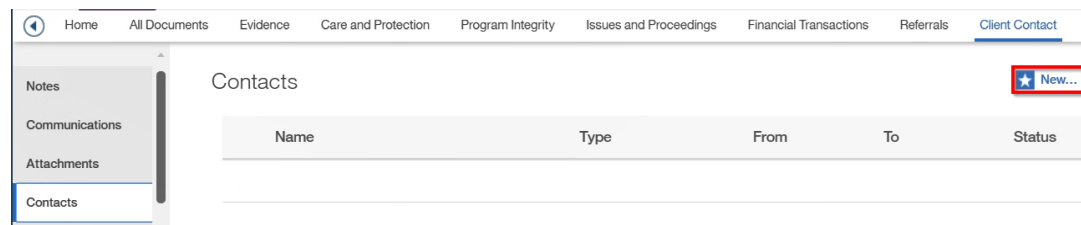
Filter Reset

Notes Communications Attachments **Contacts** Interactions

New...

Time Remaining: 2h

4. The Contacts page displays. Click the **New** hyperlink.



Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings Financial Transactions Referrals Client Contact

Contacts

New...

Name	Type	From	To	Status

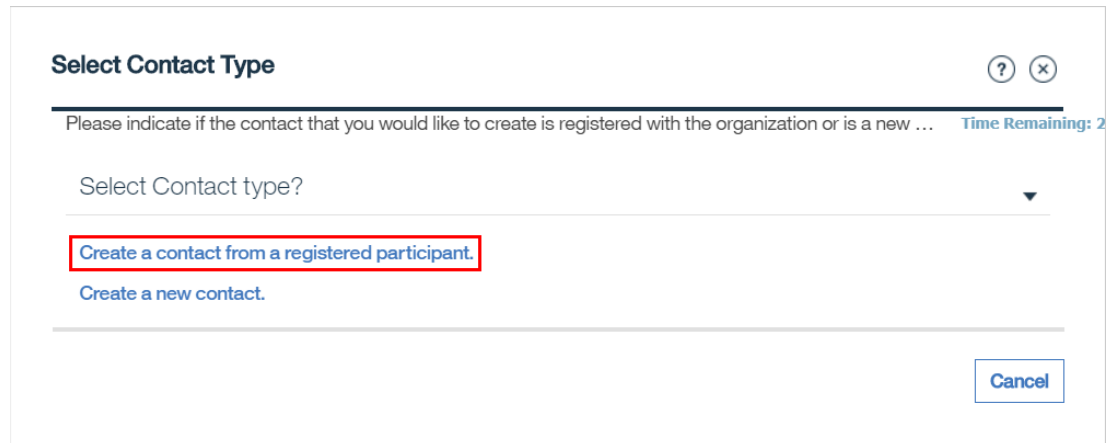
Notes Communications Attachments **Contacts**

5. The Select Contact Type pop-up appears.

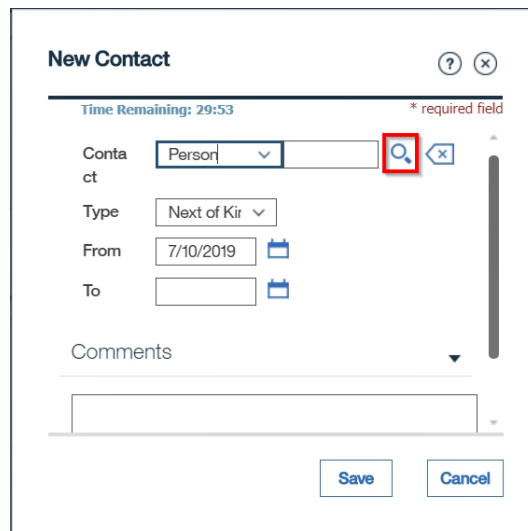
Note: Follow the guidance in steps 5.a.i-vi to add an Authorized Representative who is registered in NC FAST. Skip to step 5.b if the Authorized Representative is not registered in NC FAST and need to be added.

Note: As a reminder, it is not required for a Medicaid AR to be registered in NC FAST.

- a. Click the **Create a contact from a registered participant** hyperlink.



- i. The New Contact pop-up appears. Click the **magnifying glass**.



- ii. The Person Search pop-up appears. Enter applicable search criteria then click **Search**.

Person Search ? ×

Time Remaining: 28:28 * required field

Last Name Show Sounds Like Names ☐

Date of Birth Gender

Address Line 1 Address Line 2

City Birth Last Name

Search **Reset**

Search Results ▼

Cancel

- iii. Search results display. Click the **Select** hyperlink associated with correct person.

Person Search ? ×

Time Remaining: 29:38 * required field

City Birth Last Name

Search **Reset**

Search Results ▼

Action	Person	Address	Date of Birth
Select			

Cancel

- iv. The New Contact pop-up appears. Click the **Type** drop-down menu then select the applicable type.

New Contact



* required field

Contact

Name *

SmithPA

From *

10/14/2024

Type

Next of Kin

To

Accountant

Authorized Representative

CAP Case Manager

CC4C/CCNC Network Contact

Department of Prisons

Department of Social Services

Director

Employer

Executive Director

Address

Please enter (Apt/Suite or Street 1), City, County, State, and Zipcode.

Apt/Suite

Street 1

Cancel

v. Click **Save**.

New Contact

Time Remaining: 27:21
* required field

Contact
Person

Type
Authorizer

From
7/10/2019

To

Comments

Save

Cancel

vi. The Contacts page displays showing the client's Authorized Representative.

Home	All Documents	Evidence	Care and Protection	Program Integrity	Issues and Proceedings	Financial Transactions
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Contacts			
Name	Type	From	To
▶ Authorized Representative	Authorized Representative	7/10/2019	

- b. To add a new non-registered Authorized Representative as a contact, click the **Create a new contact** hyperlink.

Select Contact Type

? ×

Please indicate if the contact that you would like to create is registered with the organization or is a new ... Time Remaining: 2

Select Contact type? ▼

[Create a contact from a registered participant.](#)

[Create a new contact.](#)

[Cancel](#)

- i. The New Contact pop-up appears. Enter the Name of the authorized representative.

New Contact

? ×

Time Remaining: 29:40 * required field

Contact ▼

Name *	<input type="text"/>	Type	Next of Kin ▼
From *	<input type="text" value="7/10/2019"/>	To	<input type="text"/>

Address ▼

Apt/Suite	<input type="text"/>	Street 1	<input type="text"/>
Street 2	<input type="text"/>	City	<input type="text"/>

[Save](#) [Cancel](#)

- ii. Click the **Type** drop-down menu then select the applicable type.

New Contact



* required field

Contact

Name *

SmithPA

From *

10/14/2024

Type

Next of Kin

To

Accountant

Authorized Representative

CAP Case Manager

CC4C/CCNC Network Contact

Department of Prisons

Department of Social Services

Director

Employer

Executive Director

Address

Please enter (Apt/Suite or Street 1), City, County, State, and Zipcode.

Apt/Suite

Street 1

Cancel

iii. Enter the applicable **From** date.

New Contact

Time Remaining: 18:44

* required field

Contact

Name *

Type

Next of Kin

From *

To

Address

Apt/Suite

Street 1

Street 2

City

Save

Cancel

iv. Enter the Authorized Representative's Address.

Note: Address is required.



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New Contact ? ×

Time Remaining: 27:18 * required field

From * To

Address

Apt/Suite	<input type="text"/>	Street 1	<input type="text"/>
Street 2	<input type="text"/>	City	<input type="text"/>
County	<input type="text" value="v"/>	State	<input type="text" value="v"/>
Zip	<input type="text"/>		

Save **Cancel**

v. Click **Save**.

New Contact ? ×

Time Remaining: 29:40 * required field

Contact

Name *	<input type="text"/>	Type	<input type="text" value="Next of Kin"/>
From *	<input type="text" value="7/10/2019"/>	To	<input type="text"/>

Address

Apt/Suite	<input type="text"/>	Street 1	<input type="text"/>
Street 2	<input type="text"/>	City	<input type="text"/>

Save **Cancel**

vi. The Contacts page displays showing the current Authorized Representative.

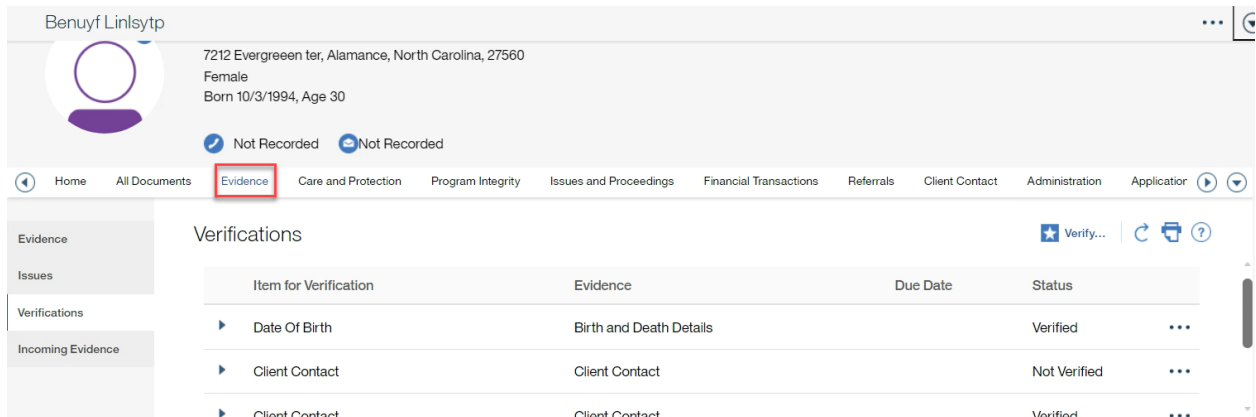
Home	All Documents	Evidence	Care and Protection	Program Integrity	Issues and Proceedings	Financial Transactions
Contacts						
Name		Type	From	To		
▶ Authorized Representative		Authorized Representative	7/10/2019			

Adding Verifications to the Person page

1. Click the **Evidence** tab on the Person page.

Notes: For steps to verify evidence, refer to the following job aids for guidance:

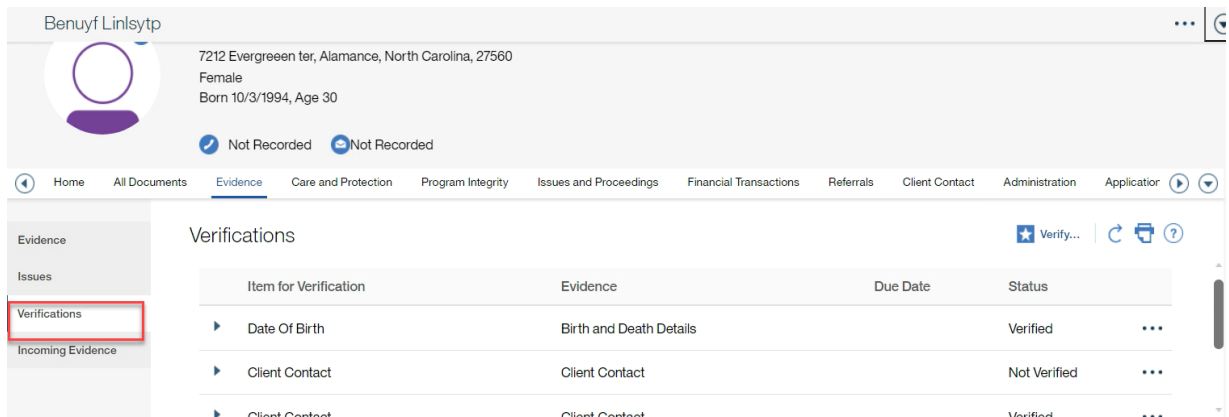
- *Adding Verifications*
- *Verifications*



Person page for Benuyf Linlsytp. The **Evidence** tab is selected in the top navigation bar. The left sidebar shows the **Verifications** folder selected. The main content area displays a table of verifications:

Item for Verification	Evidence	Due Date	Status
Date Of Birth	Birth and Death Details		Verified
Client Contact	Client Contact		Not Verified
Client Contact	Client Contact		Verified

2. Click the **Verifications** folder.



The **Verifications** folder is highlighted in the left sidebar. The main content area displays the same table of verifications:

Item for Verification	Evidence	Due Date	Status
Date Of Birth	Birth and Death Details		Verified
Client Contact	Client Contact		Not Verified
Client Contact	Client Contact		Verified

3. Click the **List Actions Menu** then select **Add Proof**.



The 'Not Verified' status for the 'Client Contact' row is highlighted. A **Add Proof...** button is visible next to the 'Not Verified' status.

Item for Verification	Evidence	Due Date	Status
Date Of Birth	Birth and Death Details		Verified
Client Contact	Client Contact		Not Verified
Client Contact	Client Contact		Verified

- The Add Proof pop-up appears. Click the **Item** drop-down menu then select the applicable verification.

Add Proof

Item * thorized Representative Form ▼

Date Received

Provided By

If the provider of the item is

Participant

If the provider of the item is

Designation Authorized Representative Form
 Court Documents
 Consent to Release forms
 No/Inadequate documentation
 Voice Signature obtained.
 Guardianship Papers
 Power of Attorney Papers
 DMA-5018 (non-spouse/parent)
 DSS CAP/PACE Employee Statement
 Client Statement (parent/spouse)

- Click the **Participant** drop-down menu then select the applicable option. Add **Name** then Click **Save**.

Add Proof ? ×

* required field

Provided By ▼

If the provider of the item is registered on the system, please select from below.

Participant Person ▼ 🔍 ✕

If the provider of the item is

Name

Attachment ▼

Education Institute
 Employer
 External Party
 Information Provider
 Person
 Product Provider
 Provider
 Provider Group

Save
Cancel