

# MAGI - Change Primary Client/Case Head

Last Updated: 09/19/2019

## Overview

This job aid outlines the steps for changing the Primary Client/Case Head. It is important to know that the first person who is applying will automatically be made the Primary Client/Case Head, even if they are not entered first on the application. For communication and Child Support referral purposes, a parent or adult caretaker relative should be made the Primary Client/Case Head on cases with only minor children receiving assistance.

## Step-by-Step Instructions

### Changing the Primary Client/Case Head prior to authorizing the Insurance Affordability Application Case

**Note:** Complete the following steps *prior to authorizing* the Application case, if the person marked as the Primary Applicant in the Application Details evidence should not be the Primary Client/Case Head.

1. After submitting the Insurance Affordability Application, click the **Evidence** tab.
2. Edit the Application Details evidence for the client that should not be the Primary Client/Case Head. Uncheck the box for **Primary Applicant** then click **Save**.
3. Edit the Application Details evidence for the client that should be the Primary Client/Case Head. Click the **check box** for **Primary Applicant** then click **Save**.
4. Proceed with processing the Insurance Affordability Application.

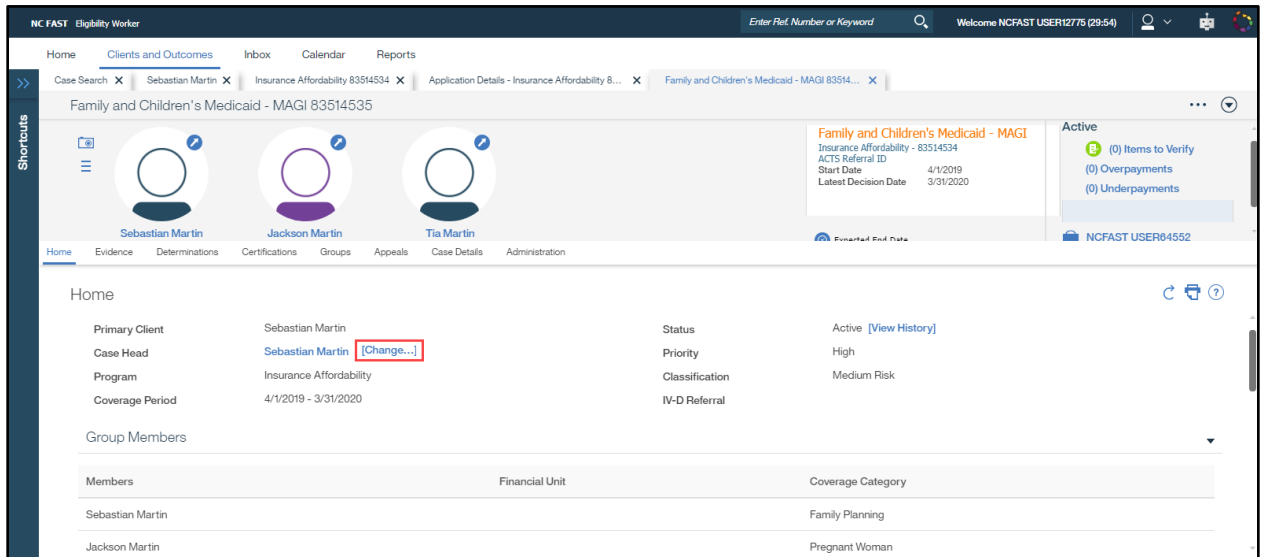
**Note:** For further assistance processing and submitting Insurance Affordability Applications, please refer to the *MAGI - Application to Case and Key Differences Checklist* job aid.

### Changing the Case Head on an active Product Delivery Case (PDC)

**Note:** Complete the following steps if a change in Case Head is required on a PDC.

1. Navigate to the Product Delivery Case (PDC) Home tab.

- Click the **[Change...]** hyperlink next to the name of the current Case Head. The Case Head pop-up appears.



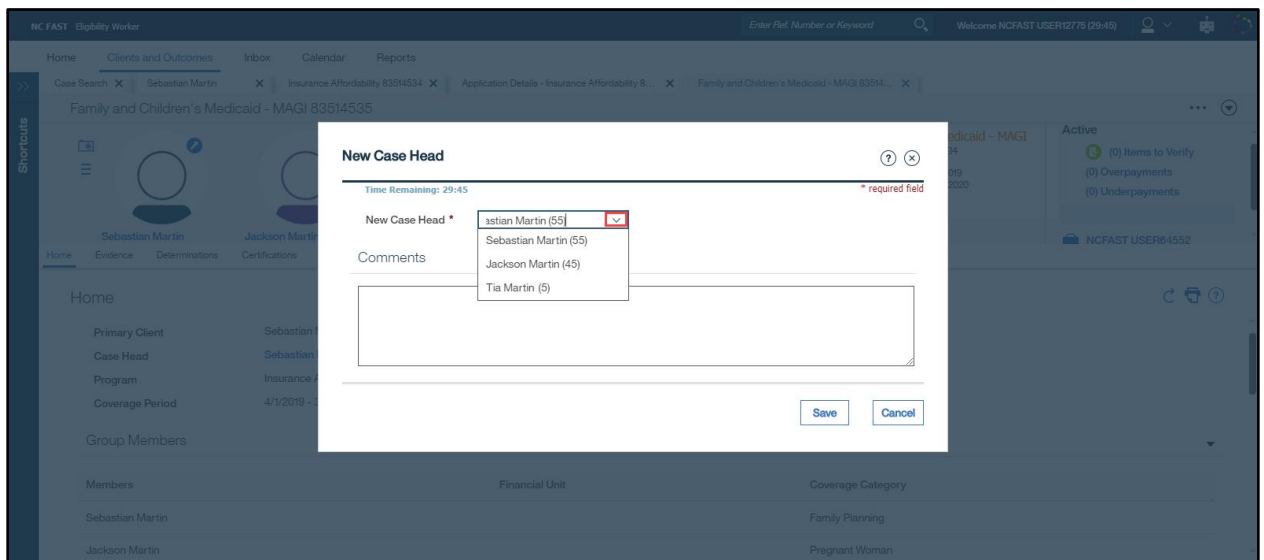
The screenshot shows the NC FAST Eligibility Worker interface. The top navigation bar includes 'Home', 'Clients and Outcomes', 'Inbox', 'Calendar', and 'Reports'. The main content area displays the case details for 'Family and Children's Medicaid - MAGI 83514535'. The 'Case Head' field is highlighted with a red box and the text '[Change...]'.

Primary Client	Sebastian Martin	Status	Active <a href="#">[View History]</a>
Case Head	Sebastian Martin <b>[Change...]</b>	Priority	High
Program	Insurance Affordability	Classification	Medium Risk
Coverage Period	4/1/2019 - 3/31/2020	IV-D Referral	

Group Members

Members	Financial Unit	Coverage Category
Sebastian Martin		Family Planning
Jackson Martin		Pregnant Woman

- Click **New....** The New Case Head pop-up appears.
- Click the **New Case Head** drop-down menu then select the new Case Head.



The screenshot shows the NC FAST Eligibility Worker interface with the 'New Case Head' pop-up form open. The 'New Case Head' field is highlighted with a red box and the text '[Change...]'.

**New Case Head**

Time Remaining: 29:45 \* required field

New Case Head \* **[Change...]**

Comments

Save Cancel

- Click **Save**. The Case Head pop-up reappears.
- Click **X** to close the pop-up.