

MAGI - Managing Incoming Evidence

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Overview

=This job aid describes the process of managing incoming evidence.

There are situations, such as adding a new household member, which require a new Insurance Affordability Application Case (IAAC) to be created for a household who already has an existing Insurance Affordability Integrated Case (IAIC). When the new application case is submitted, evidence is brokered from the original integrated case and is shared with the new application case. The evidence waits in the Incoming Evidence folder on the new application case where the worker can choose to accept or reject the evidence.

Note: The Evidence Broker links evidence from case to case by person.

Incoming evidence should be managed prior to authorizing the new application case. Failure to do so can result in the duplication of identical evidence on the original integrated case. It is recommended that evidence changes be managed as they occur.

In some cases, after authorizing the new application case, unique evidence for individuals on the new integrated case is brokered back to the original integrated case; automatic activation of unique evidence could produce a changed decision on the existing integrated case. Therefore, an On Hold decision may need to be accepted or rejected.

Step-by-Step Instructions

Managing Income Evidence on an Insurance Affordability Application Case

When clients in a household have existing Insurance Affordability Integrated Case(s) (IAICs), navigate to each of these existing IAICs and manage any evidence that is no longer applicable. One way to do this may require end dating that evidence.

Note: Until MAGI Change of Circumstance is released into NC FAST, workers should use caution when using Apply Changes on IAICs.

1. Key the new Insurance Affordability Application Case (IAAC) then click **Submit**.
2. Click the **Find Client** hyperlink then complete the registration process for each client on the IAAC.

Note: The Find Client process should be completed, and all clients listed on the application case, should have a registered status of *Yes* prior to managing incoming evidence.

3. Click the **Evidence** tab then click the **Incoming Evidence** folder.
4. The Incoming Evidence page displays. Click the **Identical** tab.
5. Click the **List Actions Menu** for each piece of incoming evidence then select **Compare**. Review the results and follow the guidelines below.
 - a. When evidence values are the same (with the exception of the Start Date) click **Accept** for the evidence with the earlier start date.
 - b. When evidence values are different it is important to determine why. If incoming evidence is no longer accurate, click **Reject** then go back to step 1. After completing step 1, evidence will broker (be sent) once again into the Incoming Evidence folder and can now be accepted.

Note: The Non-Identical tab will become important once MAGI evidence brokering is extended to traditional cases.

6. Continue processing the IAAC through Authorization using the steps outlined in the **MAGI Application to Case** job aid. Do this only after all incoming evidence has been processed. Remaining application steps include.
 - a. Update evidence.
 - b. Add verifications.
 - c. Check eligibility.
 - d. Authorize if eligible and Deny if not eligible.

Note: Managing Incoming evidence must be done before authorizing the new IAAC. After the new IAAC is authorized, evidence is brokered back to other IAIC(s) by matching persons. These changes in evidence may change eligibility decisions (an example might be a change in income). New evidence entered on the latest IAAC may have auto-activated when sent to the original IAIC, causing an On Hold Decision.

7. Navigate to the PDC associated with the original IAIC then click the **Determinations** tab to see if the case was put *On Hold*. Click the **Eligibility** tab on the IAIC to manage On Hold decisions.
8. Review On Hold Decisions.
 - a. If On Hold Decision is appropriate, **Accept with Timely** or **Accept with Adequate**.

- b. If On Hold Decision is not correct, proceed to step 1 below in the Managing Income Evidence on an IAIC section.
 - c. If Decision is not On Hold, proceed to step 1 in the Managing Income Evidence in an Insurance Affordability Case section (below).
9. Repeat steps 1-8 for any other IAIC(s) that were created prior to authorizing the new IAAC.

Notes: When an IAAC is authorized prior to managing incoming evidence, there can be an unforeseen impact on any pre-existing IAIC(s).

- Since evidence for common individuals are shared back to the other IAIC(s) after the new IAAC is authorized, NC FAST attempts to auto activate the evidence. Any evidence that was not previously on the IAIC(s) will be activated automatically. This can result in On Hold decisions that need to be accepted or rejected.
- Evidence that is identical attempts to activate also. However, because there is already active evidence of that type with an earlier start date, the 'new' identical evidence will fail to activate and waits in In-edit status. The In-edit evidence may need to be discarded.

Step-by-Step Instructions

Managing Income Evidence on an Insurance Affordability Case

This portion of the job aid will guide the worker through the process of cleaning up the impacted IAIC(s) when incoming evidence was not managed prior to application case authorization.

1. Navigate to the pre-existing IAIC and click the **Evidence** tab then click **Dashboard** folder.
2. Click the **evidence** hyperlink for any evidence type that is in *In-edit* status.
3. Verify that there is already active evidence of the same type with an earlier start date for the individual.
4. If evidence exists with an earlier start date, click the toggle for the In-edit evidence and click the **List Actions Menu** then select **Discard**. Close the evidence workspace and return to the Dashboard view.
5. Repeat steps 2-4 for all evidence that is *In-edit* status.
6. Click the **Active Evidence** folder. All active evidence for the IAIC will display.

7. Sort the evidence by clicking on the **Period** column header to identify evidence that may have been activated with the new application date.
8. Verify whether the evidence should have been applied to the original IAIC.
 - a. If the evidence was applied appropriately according to policy, go to step 11.
 - b. If the evidence should not have been applied, click the **toggle** next to the applicable evidence, click the **List Actions Menu** then select **Delete**.
9. Repeat step 8 for any other *Active* evidence which should not have been applied to the original IAIC.
10. Click the **Tab Actions Menu** on the IAIC then select **Apply Changes** from the drop-down menu.
11. Navigate to the PDC associated with the IAIC then click the **Determinations** tab to see if the case was put On Hold. Return to the **Eligibility** tab on the IAIC to manage On Hold decisions.
12. Review On Hold Decisions.
 - a. If On Hold Decision is appropriate, **Accept with Timely** or **Accept with Adequate**.
 - b. If On Hold Decision is not correct, go back to step 10.
 - c. Decision is not On Hold, go back to step 2.
13. Repeat steps 1-12 for any other IAIC(s) that were created prior to authorizing the new IAAC.