

MAGI New Member Application with Online Change of Circumstance (CoC)/Recertification

Last Updated: 11/4/2021

1. Overview	1
2. Step-by-Step Instructions.....	2
3. Process a New Member Application.....	2
4. When a New Member Application would cause adverse effects.....	8
5. Apply Changes.....	9
6. Applicant is not eligible and an application denial is required:.....	10
7. Authroization of Benefits.....	13
8. Stop Processing Time for New Member Applications on the CoC/Recert Application tab is completed through the following steps.	15
9. To view/edit Stop Processing Time:.....	17
10. Withdrawals through the CoC/Recert Application tab are completed through the following steps.	18

Overview

This guide describes how to process a New Member Application as part of a CoC/Online Recertification when submitted through ePASS.

Key Points

- For information on MAGI Recertifications, refer to the MAGI Medicaid Recertification job aid.
- Linked/Enhanced ePASS users can apply for medical benefits for new or existing household members when completing an Online CoC or Online Recertification via ePASS. They can also add a new household member who is not applying. Refer to the ePASS Linking and Delinking Enhanced Accounts job aid.
- A task is generated when a New Member Application has been reported as part of an online CoC or Recertification. The task is sent to the Online Recertification and Change

of Circumstance county queue. Refer to the CoC Work Queues and Tasks How to Guide for more information on work queues and tasks related to New Member Applications.

- When an ePASS user reports that a new applicant is aged, blind, or needs assistance with daily activities, ePASS will advise the user that an additional application should be completed and will provide a link to start that application. This step is optional for the user.
- If the user completes this application, a separate Traditional Medicaid application will be created.
- If the user chooses not to complete the additional traditional application via ePASS, the information will be listed on the Add Member Application PDF and the caseworker would be responsible for keying that application in NC FAST.
- If Retro assistance is requested as part of a New Member Application, a separate Integrated Insurance Affordability Application Case is created.
- Review the New Member Application PDF to view information reported by the client that may not be included on the Evidence Dashboard, prior to processing.
- Caseworkers will need to review the New Member IA Application PDF to confirm the answer was No or if it was not answered (response is blank). Caseworkers will need to reach out to the applicant to gather the information if response is blank. Blank responses should not be considered as a No response.
- Caseworkers should not use this functionality if the existing household members are on an IAIC that is in a county other than their own; rather, in these instances, a full “regular” MAGI application should be keyed, and a county transfer requested. If the county transfer occurs prior to application disposition, integration into the existing IAIC should occur; if not, a new IAIC should be created. Once the county transfer occurs, if multiple IAIC’s have been created for the same household, the IAIC’s should be integrated into one.
- For FFM CoC applications, workers should reference the FFM CoC Job Aid found on FAST Help.

[Return to TOC](#)

Step-by-Step Instructions

Process a New Member Application

1. Navigate to the Insurance Affordability Integrated Case associated with the New Member Application.

- Click the **CoC/Recert Application** tab. The CoC/Recert Application page displays showing the New Member Application in *Open* status.

its	Clients	Evidence	Eligibility	Participants	CoC/Recert Application	Compliance	Case Details
-----	---------	----------	-------------	--------------	-------------------------------	------------	--------------

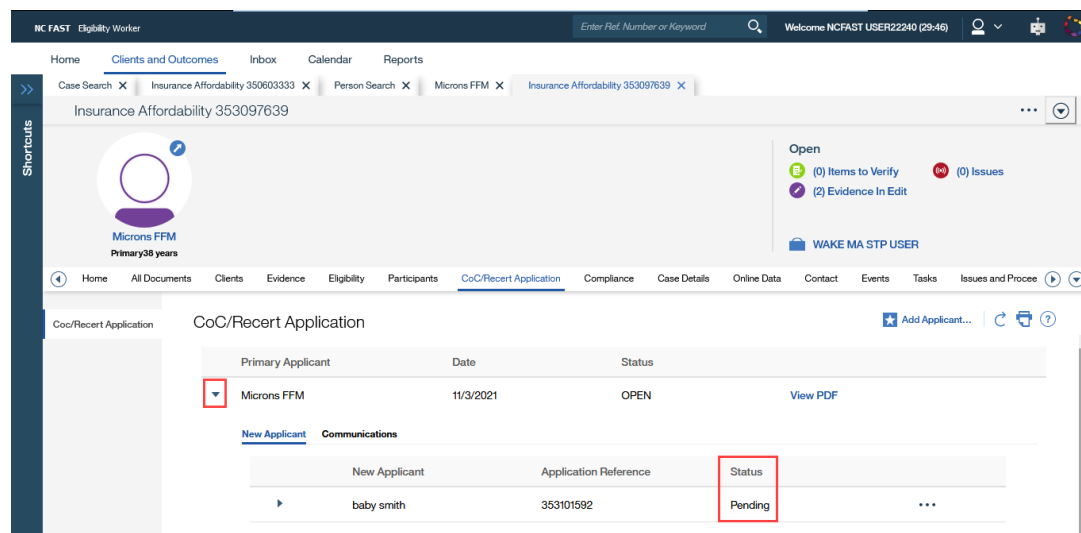
CoC/Recert Application		
Primary Applicant	Date	Status
▼ wells fargo	11/4/2021	OPEN

- Click the **toggle** beside the Primary Applicant's name to view the New Applicant information.

Note: The Primary Applicant is the Case Head of the IAIC even though the Case Head may not be applying for benefits.

- A New Applicant line item displays in *Pending* status.

Note: In the case of more than one person included in the application applying, each applicant will have a separate new applicant line item.



NC FAST Eligibility Worker

Enter Ref. Number or Keyword

Welcome NCFAST USER22240 (29:46)

Home Clients and Outcomes Inbox Calendar Reports

Case Search X Insurance Affordability 350603333 X Person Search X Microns FFM X Insurance Affordability 353097639 X

Insurance Affordability 353097639

Open

(0) Items to Verify (0) Issues

(2) Evidence In Edit

WAKE MA STP USER

Home All Documents Clients Evidence Eligibility Participants **CoC/Recert Application** Compliance Case Details Online Data Contact Events Tasks Issues and Process

CoC/Recert Application

Primary Applicant	Date	Status
▼ Microns FFM	11/3/2021	OPEN

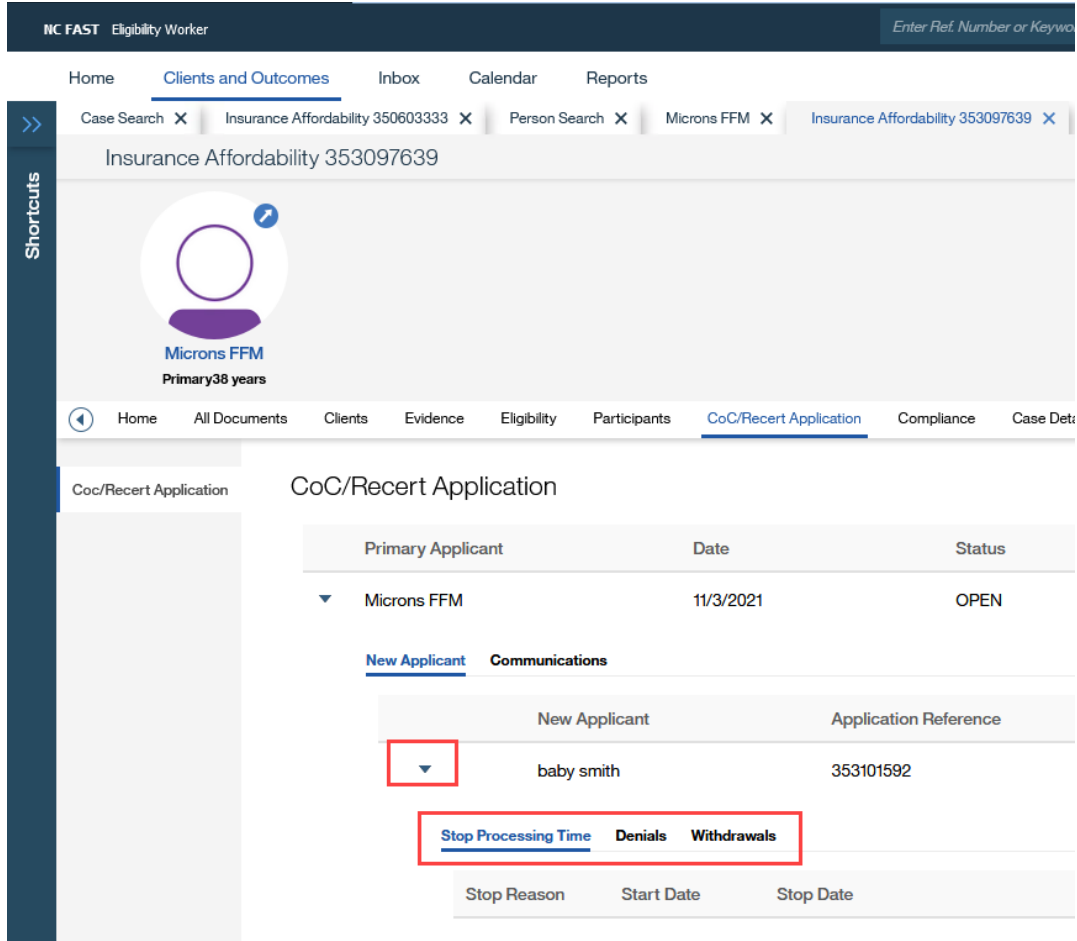
View PDF

New Applicant Communications

New Applicant	Application Reference	Status
▶ baby smith	353101592	Pending

- Click the **toggle** next to the New Applicant name. The Stop Processing Time, Denials, and Withdrawals tabs are displayed.
 - For steps on Stop Processing Time, see the Stop Processing Time for New Member Applications section in this document.
 - For steps on withdrawing on application, see the Withdrawal section in this document.

- For steps on Denying an application, see the Denials (Step 19) section in this document.



The screenshot shows the NC FAST Eligibility Worker interface. The top navigation bar includes links for Home, Clients and Outcomes, Inbox, Calendar, and Reports. A search bar on the right allows entering a reference number or keyword. Below the navigation bar, there are tabs for Case Search, Insurance Affordability 350603333, Person Search, Microns FFM, and Insurance Affordability 353097639. The main content area displays the client profile for Microns FFM, Primary 38 years. The left sidebar contains a Shortcuts menu. The main content area shows the CoC/Recert Application section with a table of applications. The table has columns for Primary Applicant, Date, and Status. A dropdown menu is visible next to the Microns FFM entry, showing a list of new applicants. The 'New Applicant' dropdown is highlighted with a red box, and the 'Stop Processing Time' tab is also highlighted with a red box.

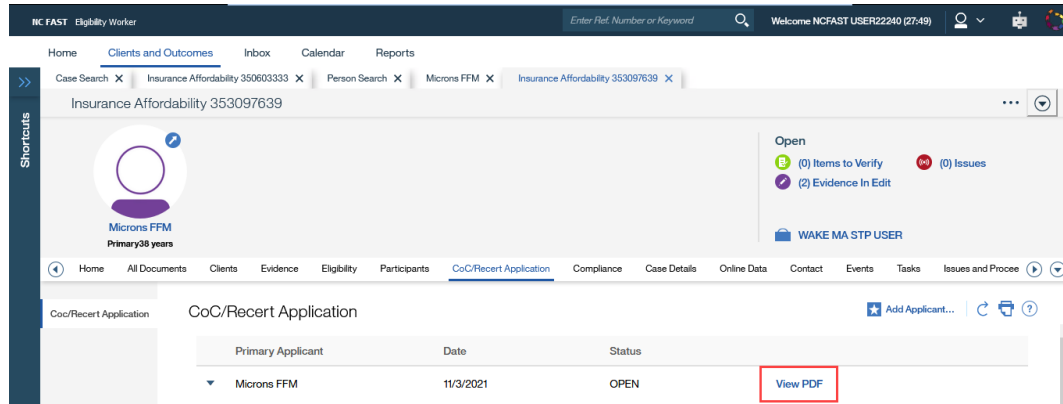
Primary Applicant	Date	Status
Microns FFM	11/3/2021	OPEN

New Applicant	Application Reference
baby smith	353101592

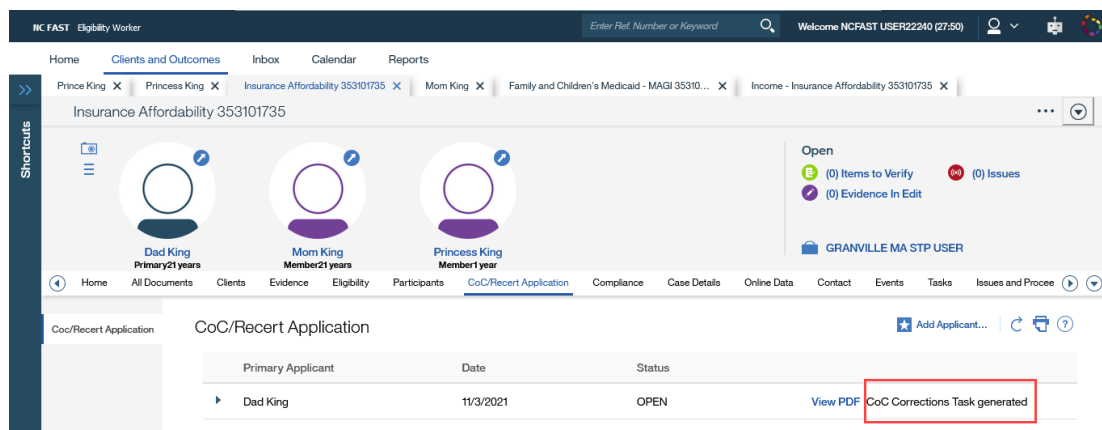
Stop Reason	Start Date	Stop Date
-------------	------------	-----------

- Click **View PDF** link to view the New Member Application PDF.

Note: Caseworkers will be responsible for reviewing this document carefully, as some information captured during the Online CoC/Recert process will not populate in the case evidence. For example, the PDF will capture all questions from the New Member Application IEG and indicate whether the user indicated No or left the question unanswered. Blank responses should not be considered to mean No and may require caseworker follow-up.



7. If there is evidence that was already in-edit on the case, and new changes related to that evidence are reported as part of Online Recert/CoC or New Member Application, the text CoC Correction Task is Generated will display on the new application line item. The task that is generated will direct the caseworker to Case Notes containing the new information reported by the ePASS user, as well as the existing evidence in NC FAST, so that comparisons can be easily made.

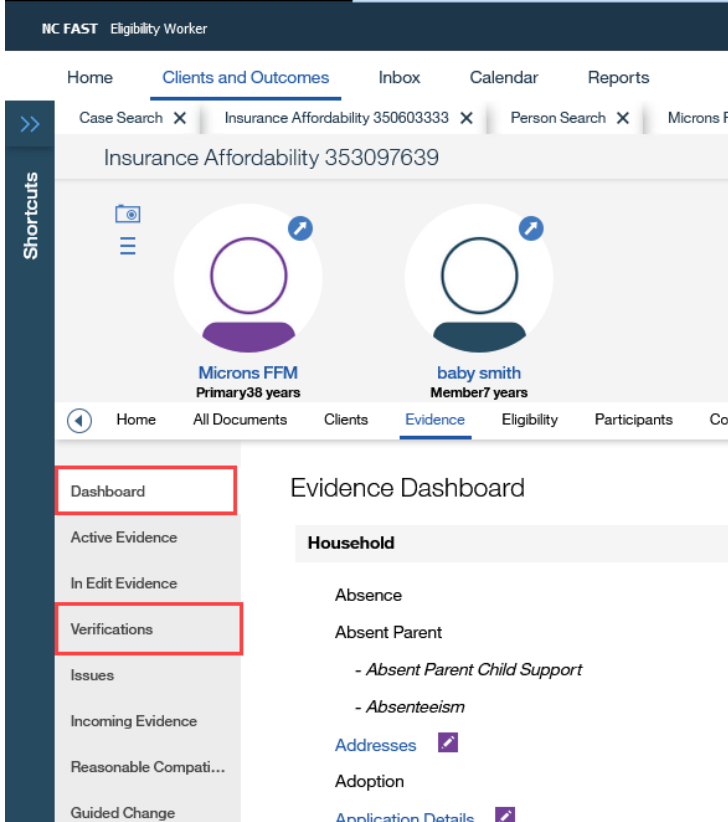


8. Navigate to the Evidence Dashboard.
9. Make any necessary evidence updates and add all outstanding verifications.

Notes:

- For assistance, refer to the *Adding Verifications* job aid and the *MAGI – Medical Assistance Evidence Verification Items and Levels* job aid.
- If **Unevaluated Evidence Errors** occur, they must be resolved **prior** to all appropriate outstanding evidence verifications displaying on the IAIC. Once all Unevaluated Evidence Errors have been resolved, all the appropriate outstanding verification items will display both in the Verifications folder

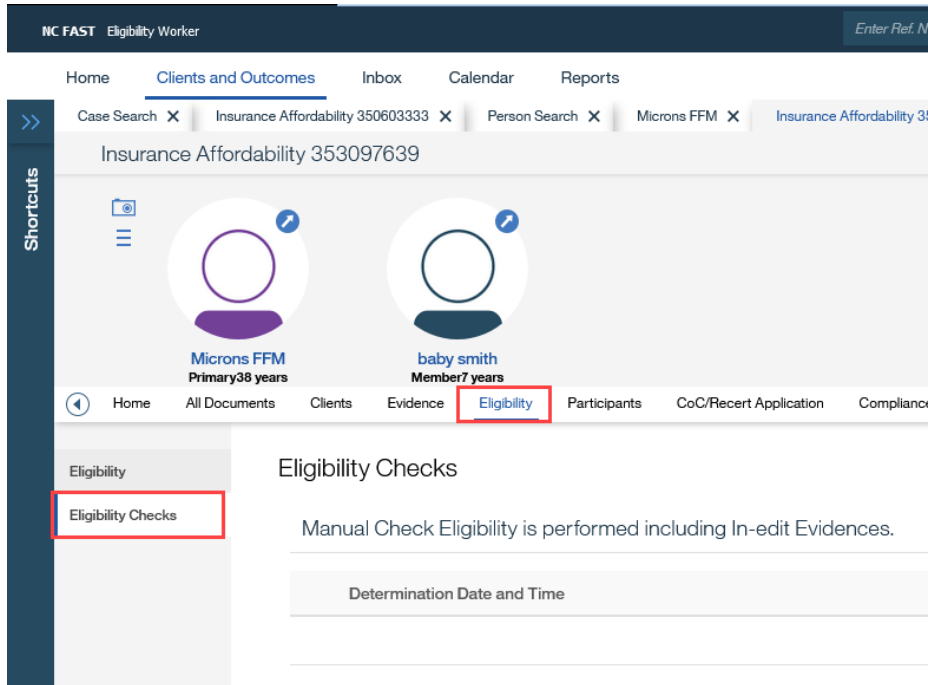
and on the Evidence dashboard of the IAIC. Refer to *Unevaluated Evidence Error* in Job Aid's for further guidance.



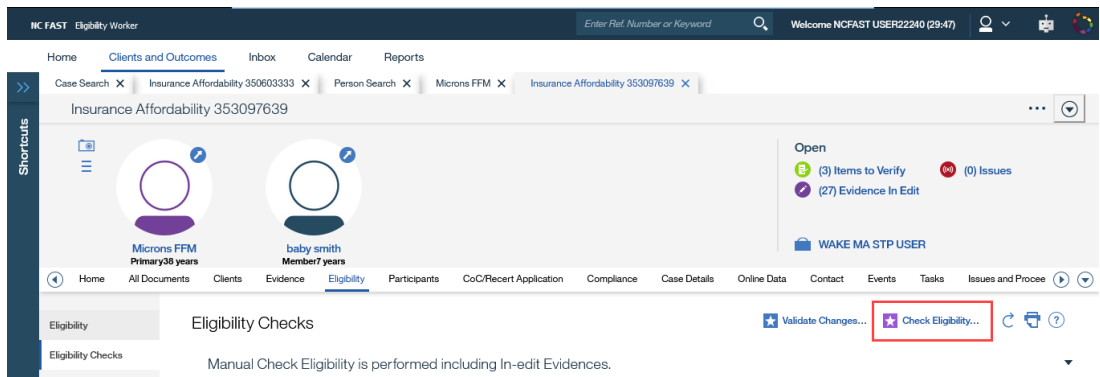
The screenshot shows the NC FAST Eligibility Worker interface. The top navigation bar includes Home, Clients and Outcomes, Inbox, Calendar, and Reports. Below this, there are tabs for Case Search, Insurance Affordability 350603333, Person Search, and Microns F. The main content area displays the Insurance Affordability 353097639 case. It features two profile cards: Microns FFM (Primary 38 years) and baby smith (Member 7 years). The left sidebar contains a Shortcuts menu with options like Dashboard, Active Evidence, In Edit Evidence, Verifications, Issues, Incoming Evidence, Reasonable Compati..., and Guided Change. The main content area shows the Evidence Dashboard with a Household section listing Absence, Absent Parent, and Absenteeism. There are also links for Addresses, Adoption, and Application Details.

- Click the **Eligibility** tab the click **Eligibility Checks** folder. The Eligibility Checks page displays.

Note: for further assistance, refer to *the MAGI Check Eligibility on an Insurance Affordability Integrated Case* how to guide.



11. Click the **Check Eligibility** hyperlink.



12. The Eligibility Determination line item displays.
13. Toggle into the Determination line item to view the Eligible Program Type(s).
14. Toggle into the Program Type line item to view specific coverage periods.
15. Toggle into the Coverage Period line item to view specific Coverage Information.
16. Click the **coverage period** hyperlink(s) to review detailed eligibility information for each period. Accuracy of results should be verified before proceeding.
17. If there are no adverse effects, skip to **Apply Changes Section**.

Return to TOC

When a New Member Application would cause adverse effects

If an eligibility check determines that information reported from the Online CoC/Recert or New Member Application would cause adverse effects (reducing benefit or causing ineligibility) for an existing household recipient, the following steps should be taken so that the benefits for both beneficiary's issue correctly:

1. Add Medical Continued Eligibility evidence on the PDC for the adversely affected individual(s).
2. Enter the Start Date as the first day of the month of benefit reduction/ineligibility for the individual, and the End Date as:
 - a. The last day of the month the timely notice expires, only if the person should reduce/terminate after timely notice. (e.g., reports death, not NC resident, etc.).

Note: The dates used should reflect the time needed for the timely notice. The Public Health Emergency (PHE) does not currently allow lesser benefits for most situations.
 - b. The last day of the adversely affected individual's current certification period.

Note: Use this date if someone should continue receiving current benefits due to PHE. Refer to the *Continued Eligibility for Medical Assistance* job aid for further guidance.
3. Check Eligibility again and review the results.
4. Apply the Medical Continued Eligibility evidence. This should result in a system accepted changed decision.
5. Confirm all evidence on the IAIC related to the CoC and/or New Member Application is validated and verified.
6. Apply Changes on the IAIC.
7. Review the On Hold Changed Decision to confirm the determination is as expected.
8. Accept the On Hold Changed Decision Adequately.

Note: Refer to the *Working with Changed Decisions* job aid for further guidance.
9. Select **No Notice** for each household member listed that does not require a timely notice or is being newly approved.

Note: Any required Adequate DSS-8110 notices should be triggered from the 8110 modal at the time the decision is accepted Adequately by selecting the appropriate Reason and Outcome.
10. Navigate to the Communications folder under the Case Details tab on the PDC.

11. Click the **Page Actions Menu** and select **New Pro Forma** to send a timely DSS-8110 for the adversely impacted individual(s).
12. Complete the appropriate fields on the New Pro Forma Communication modal and click **Next**.
13. Select **Notice** in the dropdown and click **Search**.
14. Select **Timely** from the dropdown on the Adequate vs Timely modal and click Next.
15. Select the appropriate Reason and Outcome for the adversely impacted household members.

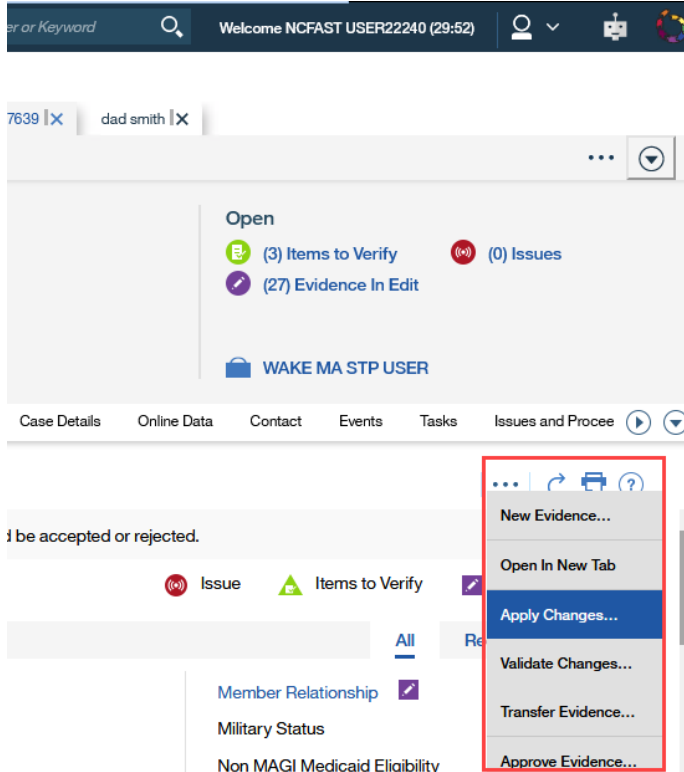
Note: Select No Notice for the newly approved applicant and/or household members sent an Adequate DSS-8110.
16. Confirm the Effective Date displayed is correct or enter the correct Effective Date.
17. Click Save.

Note: Refer to the MA/MAGI DSS-8110 Notice of Modification, Termination, or Continuation of Public Assistance job aid for further assistance.
18. Create a DMA-5003 outside of NC FAST for the approved applicant(s).
19. Continue to Apply Changes Section.

[Return to TOC](#)

Apply Changes

1. Once eligibility results are verified, navigate to the Evidence Dashboard, and apply changes.



2. Navigate to the **Eligibility** tab. If all applicants are eligible for a benefit, skip to **Autoization of Benefits** section.

[Return to TOC](#)

Applicant is not eligible and an application denial is required:

1. Navigate to the **CoC/Recert Application** tab.
2. Click the **toggle** next to the Primary Applicant name.

Insurance Affordability 353101735

Shortcuts

Dad King Primary 21 years
Mom King Member 21 years
Princess King Member 1 year

Open (0)
Closed (0)

Home All Documents Clients Evidence Eligibility Participants **CoC/Recert Application** Compliance Case Details Online Data Cont

Coc/Recert Application

CoC/Recert Application

Primary Applicant	Date	Status
▼ Dad King	11/3/2021	OPEN View PDF

[New Applicant](#) [Communications](#)

New Applicant	Application Reference	Status
▶ Prince King	353101754	Pending

Note: The Primary Applicant is the Case Head of the IAIC even though the Case Head may not be applying for benefits.

- Click the **List Actions Menu** for the Applicant to be denied.
- Select **Deny** from the drop-down menu.

CoC/Recert Application [Add Applicant...](#) [Refresh](#) [Print](#) [Help](#)

Primary Applicant	Date	Status
▼ Dad King	11/3/2021	OPEN View PDF CoC Corrections Task generated

[New Applicant](#) [Communications](#)

New Applicant	Application Reference	Status
▶ Prince King	353101754	Pending

Stop Processing Time...
Deny...

- The Applicant Denial pop-up appears.
- Select the applicable **Denial Reason** from the drop-down menu.
- Add any required Comments, then click **Save**.

Applicant Denial



Time Remaining: 29:51

* required field

System calculated Denial Reason

Denial Reason

Comments

Save

Cancel

Note: Refer to the *MAGI-Application to Case and Program and Product Exclusion* job aids for more information on denials and denial notices.

- The CoC/Recert Application tab displays. The New Applicant now shows a *Denied* status.

Note: The Status for all remaining New Applicants, if any, will remain unchanged.

CoC/Recert Application

[Add Applicant...](#)

Primary Applicant	Date	Status	
▼ Dad King	11/3/2021	CLOSED	View PDF CoC Corrections Task generated

[New Applicant](#) **Communications**

New Applicant	Application Reference	Status	
▶ Prince King	353101754	Denied	...

- Click the **Communications** tab.

CoC/Recert Application

[Add Applicant...](#)

Primary Applicant	Date	Status	
▼ Dad King	11/3/2021	CLOSED	View PDF CoC Corrections Task generated

[New Applicant](#) **Communications**

New Applicant	Application Reference	Status	
▶ Prince King	353101754	Denied	...

- The DSS 8109H – Notice of Denial/Withdrawal displays.

CoC/Recert Application ★ Add Applicant... | ↺ ↻ ?

Primary Applicant	Date	Status	
▼ Dad King	11/3/2021	CLOSED	View PDF CoC Corrections Task generated

New Applicant [Communications](#)

Subject	Type	Name	Communication Status	Date	Held To Date	Status	
DSS 8109H - Notice of Denial / Withdrawal	Pro Forma	Dad King	Sent eNotice	4/22/2021		Active	...

11. Click the **List Actions Menu**.

12. Select the appropriate option to edit, preview, or delete the communication.

CoC/Recert Application ★ Add Applicant... | ↺ ↻ ?

Primary Applicant	Date	Status	
▼ Dad King	11/3/2021	CLOSED	View PDF CoC Corrections Task generated

New Applicant [Communications](#)

Subject	Type	Name	Communication Status	Date	Held To Date	Status	
DSS 8109H - Notice of Denial / Withdrawal	Pro Forma	Dad King	Sent eNotice	4/22/2021		Active	<div style="border: 1px solid red; padding: 2px;"> ... Edit... Preview </div>

Return to TOC

Authroization of Benefits

1. To authorize benefits for a new applicant, click **Eligibility** tab then select the **Eligibility** folder to view Changed Decisions. The Changed Decision should be reviewed for accuracy before proceeding.
2. Click the **toggle** to view the Coverage Period and Decision.

Home All Documents Clients Evidence **Eligibility** Participants CoC/Recert Application Compliance

Eligibility

Eligibility Checks

Changed Decisions

Creation Date	Created By	Program	Reason
11/4/2021 07:16	NCFast USER22240	Family and Children's Medicaid - MAGI	Case Reassessment

Coverage Period	Decision
10/1/2022 - 10/31/2022	Eligible
12/1/2021 - 9/30/2022	Eligible
11/4/2021 - 11/30/2021	Eligible
11/3/2021 - 11/3/2021	Eligible

- Accept the Changed Decision with Adequate. Accepting the Changed Decision will dispose the New Member Application for any applicants that are eligible for benefits.

Note: If the decision needs to be accepted timely, go to **When a New Member Application would cause adverse effects** section and see Step 14.

Changed Decisions

Creation Date	Created By	Program	Reason	Determination Status
11/4/2021 07:16	NCFast USER22240	Family and Children's Medicaid - MAGI	Case Reassessment	Automatic Hold

View Case
Accept w/Timely...
Accept w/Adequate...

- Navigate to the CoC/Recert Application tab. The Primary Status column will display *CLOSED* once all new member applicants within this application have been processed. The New Applicant Status column will be updated to display the application disposition type, whether *Approved*, *Denied*, or *Withdrawn*.

Note: The Status for the Primary Applicant reflects the Status of the entire application and will remain *OPEN* until all New Applicants have been dispositioned.

its	Clients	Evidence	Eligibility	Participants	CoC/Recert Application	Compliance	Case Details	Online Data	Contact	Events	Tasks	Issues and Proce...
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CoC/Recert Application [Add Applicant...](#) [Refresh](#) [Help](#)

Primary Applicant	Date	Status	
▼ wells fargo	11/4/2021	OPEN	View PDF

[New Applicant](#) [Communications](#)

New Applicant	Application Reference	Status	
▶ Prince King	353102916	Pending	...

5. Review/Create required notices to applicant(s).
 - a. Create manual DHB-5003 outside of NC FAST for each approved applicant.
 - b. Review the DSS-8109 created by NC FAST for accuracy.

NC FAST	Eligibility Worker	Enter Ref. Number or Keyword	Q	Welcome NCFAS
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Home **Clients and Outcomes** Inbox Calendar Reports

Person Search X Dad King X Insurance Affordability 353101735 X Case Search X Family and Children's Medicaid - MAGI 3530... X Insurance Affordability 3530...

Dad King

Dad King
1 main, Creedmoor, North Carolina, 27522
Male
Born 1/1/2000, Age 21

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

Notes
Communications
Attachments
Contacts
Interactions

Communications

Approval / Withdrawal Benefits	Pro Forma	Dad King	Sent-Central Print	11/4/2021
DMA-5097NT Request for Information	Pro Forma	Dad King	Sent-Central Print	11/4/2021
DSS 8109H - Notice of Denial / Withdrawal	Pro Forma	Dad King	Sent-Central Print	11/4/2021

Return to TOC

Stop Processing Time for New Member Applications on the CoC/Recert Application tab is completed through the following steps.

1. Click the **List Actions Menu** for the applicant that needs Stop Processing Time added and select **Stop Processing Time** from the drop-down menu.



New Applicant Communications

New Applicant	Application Reference	Status	
▶ STEWART LITTLE	100175114	Pending	...

...

Stop Processing Time.....

Deny.....

Withdraw.....

2. The New Stop Processing Time pop-up appears.

a. Complete the mandatory fields:

- i. Date Initial DMA-5097 Sent, if applicable
- ii. Stop Processing Time Reason
- iii. Stop Processing Time Start Date
- iv. Add any additional Comments that are required.

Note: Date Initial DMA-5097 Sent is a required field. A validation will display if the Stop Processing Time is within 12 days of when the initial DMA-5097 was sent.

b. Click **Save**.



New Stop Processing Time

? ×

* required field

Exclusion Reason ▼

Household Member

STEWART LITTLE

Date Initial DMA-5097 Sent

Stop Processing Time Reason *

Stop Processing Time End Date

Stop Processing Time Start Date *

Comments ▼

Save

Cancel

Return to TOC

To view/edit Stop Processing Time:

1. Click the **toggle** next to the New Applicant with Stopped Processing Time. The Stop Processing Time tab displays.
2. Click the **List Actions Menu**.
3. Select the appropriate action to **View, Continue Editing**, or discard the Stop Processing Time.

Note: The Stop Processing Time End Date can be applied using Continue Editing via the List Actions Menu.

▼

STEWART LITTLE

100175114

Stop Processing Time

Denials

Withdrawals

Stop Reason	Start Date	Stop Date
Additional Time	8/4/2020	

VIEW.....

Continue Editing

Return to TOC

Withdrawals through the CoC/Recert Application tab are completed through the following steps.

1. Click the **List Action Menu** for the Applicant to be Withdrawn.
2. Select **Withdraw** from the drop-down menu.

[Home](#)
[All Documents](#)
[Clients](#)
[Evidence](#)
[Eligibility](#)
[Participants](#)
[CoC/Recert Application](#)
[Compliance](#)
[Case Details](#)
[Online Data](#)
[Contact](#)
[Events](#)
[Tasks](#)
[Issues](#)

CoC/Recert Application

CoC/Recert Application

Add Applicant...

Primary Applicant	Date	Status
▼ Dad King	11/3/2021	CLOSED

[View PDF](#)
[CoC Corrections Task gene](#)

New Applicant

Communications

New Applicant	Application Reference	Status
▶ Prince King	353101754	Denied

Deny...

Withdraw...

3. The Withdraw Applicant pop-up appears.
 - a. Enter the Date.
 - b. Select the **Withdrawal Method** from the drop-down menu.
 - c. Select the **Withdrawal Reason** from the drop-down menu.
 - d. Select Requested by form the drop-down menu.
 - e. Add any required Comments.
 - f. Click **Save**.

Withdraw Applicant

Time Remaining: 29:52

* required field

Program	Insurance Affordability	Withdrawal Reason	<input type="text"/>
Date	11/4/2021	Requested By	<input type="text"/>
Withdrawal Method	<input type="text"/>		

Comments

Save

Cancel

4. The CoC/Recert Application tab displays. The New Member Applicant now shows a *Withdrawn* status.

CoC/Recert Application

[Add Applicant...](#)

Primary Applicant	Date	Status	
▶ wells fargo	11/4/2021	OPEN	View PDF
▼ wells fargo	10/25/2021	CLOSED	View PDF

[New Applicant](#) [Communications](#)

New Applicant	Application Reference	Status	
▶ top corner	353095440	Withdrawn	...

5. Click the **Communications** tab.

▼ KAREN DUNN

[New Applicant](#)

Communications

New Applicant

▶ SALLY DUNN

▶ MARY DUNN

▶ STEWART LITTLE

▶ SAMANTHA DUNN

6. The DSS 8109H – Notice of Denial/ Withdrawal displays.

vents Clients Evidence Eligibility Participants CoC/Recert Application Compliance Case Details Online Data Contact Events Tasks Issues and Proc

CoC/Recert Application

[★ Add Applicant...](#) [↺](#) [↻](#) [?](#)

Primary Applicant	Date	Status	
▶ wells fargo	11/4/2021	OPEN	View PDF
▼ wells fargo	10/25/2021	CLOSED	View PDF

New Applicant Communications

Subject	Type	Name	Communication Status	Date	Held To Date	Status	
DSS 8109H - Notice of Denial / Withdrawal	Pro Forma	wells fargo	Draft eNotice	11/4/2021		Active	...

7. Click the **List Actions Menu** and choose the appropriate option to edit, preview, or delete the communication.

CoC/Recert Application

[★ Add Applicant...](#) [↺](#) [↻](#) [?](#)

New Applicant Communications

Subject	Type	Name	Communication Status	Date	Held To Date	Status	
DSS 8109H - Notice of Denial / Withdrawal	Pro Forma	wells fargo	Draft eNotice	11/4/2021		Active	...

- Preview
- Delete...

Return to TOC