

MAGI Check Eligibility on an Insurance Affordability Integrated Case (IAIC) / Application (IAAC)

Last Updated: 08/16/2022

Last Reviewed: 08/16/2023

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Overview

This guide describes how to Check Eligibility on an Insurance Affordability Integrated Case (IAIC) in NC FAST. This guide also provides an overview of the functionality for Insurance Affordability Application Case (IAAC).

Key Points

The Check Eligibility link is located on the Eligibility tab of the IAIC and Eligibility Check tab on an IAAC.

Check Eligibility on the IAIC allows the user to check the eligibility of a new applicant and the existing beneficiaries on the IAIC prior to applying evidence changes or accepting a changed decision.

Check Eligibility and reviewing the results for recertifications should be done prior to submitting the case for approval.

The Check Eligibility process considers both In-Edit and Active evidence on the IAIC and provides an eligibility determination for applicants and beneficiaries.

Workers can Check Eligibility and view results for the following Product Delivery Cases (PDC) types:

- Family and Children's-MAGI
- Medical Forced-MAGI
- Emergency Medicaid-MAGI

Check Eligibility is not available on IAICs in *Closed* status. Check Eligibility is not available on some IAICs in *Open* status which include:

- Cases that do not contain at least one of the following:
 1. A PDC (Closed, Active, or Approved)
 2. A pending New Member Insurance Affordability Application
- Cases with an active PDC but without in-edit evidence
- Cases with Presumptive Medicaid-MAGI cases should be standalone cases.

An Eligibility Check is required prior to the denial of a New Member Application.

The Validate Changes action link is also located on the Eligibility tab of the IAIC. NC FAST will systematically validate changes on all In-Edit evidence when the user clicks Check Eligibility. If any evidence validation errors are determined, an error message will appear. The worker should correct any evidence errors prior to checking eligibility.

Check Eligibility will:

- Display the coverage type and program outcomes for each eligible applicant.
- Display income calculation information
- Display non-financial pass/fail results.
- Display the reasons for ineligible or eligible results for the applicant, as well as any pass/fail decisions.

Step-by-Step Instructions

Check Eligibility

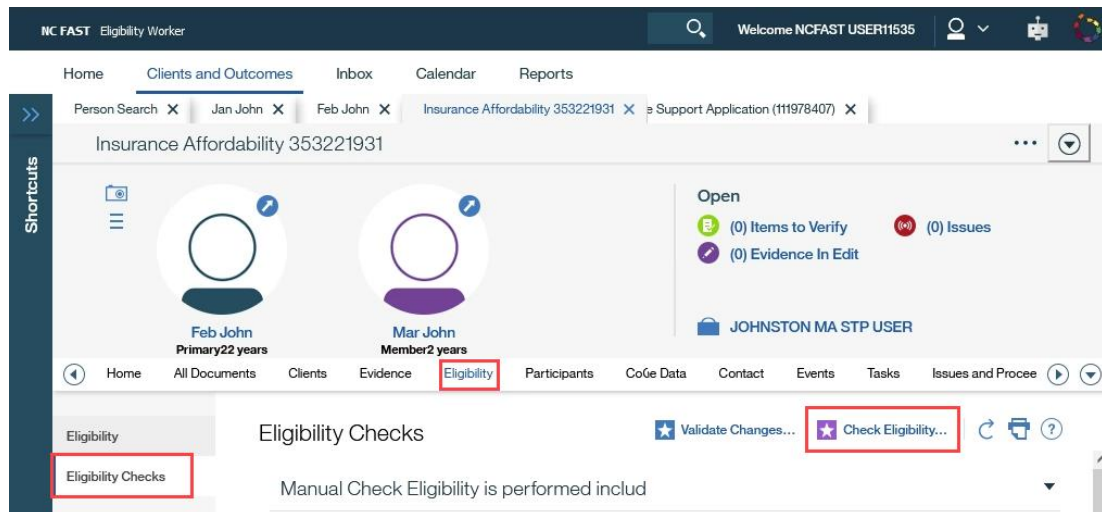
Check Eligibility results include information that is detailed and should be reviewed prior to authorizing the application or applying changes on the Integrated Case. Clicking the **Check Eligibility** hyperlink on the Eligibility Checks tab or Eligibility tab is completed through the following steps.

Insurance Affordability Integrated Case (IAIC)

1. Navigate to the **Eligibility** tab of the Insurance Affordability Integrated Case (IAIC)

Note: Eligibility folder is selected by default.

2. Click the **Eligibility Checks** folder then click the **Check Eligibility** hyperlink.



3. The Check Eligibility pop-up displays then click **Yes**.

Note: If the system detects evidence errors, an error will display. The worker should correct any evidence errors prior to checking eligibility.

Check Eligibility



Are you sure you want to check eligibility?



4. The Eligibility Checks page displays.

Note: The most recent Eligibility Check appears at the top of the list.

5. All Eligibility Checks, if any, display in separate line items.

Eligibility Checks

★ Check Eligibility... | ↻ 🖨️ ?

Manual Check Eligibility is performed including In-edit Evidences. ▼

Determination Date and Time

- ▶ 7/13/2022 07:13
- ▶ 7/13/2022 06:35

- To review Eligible Coverage Periods, click the **Toggle** next to a line items.

Eligibility Checks

▼ 12/6/2022 00:00

SYSTEM

Eligible Ineligible

Program Type

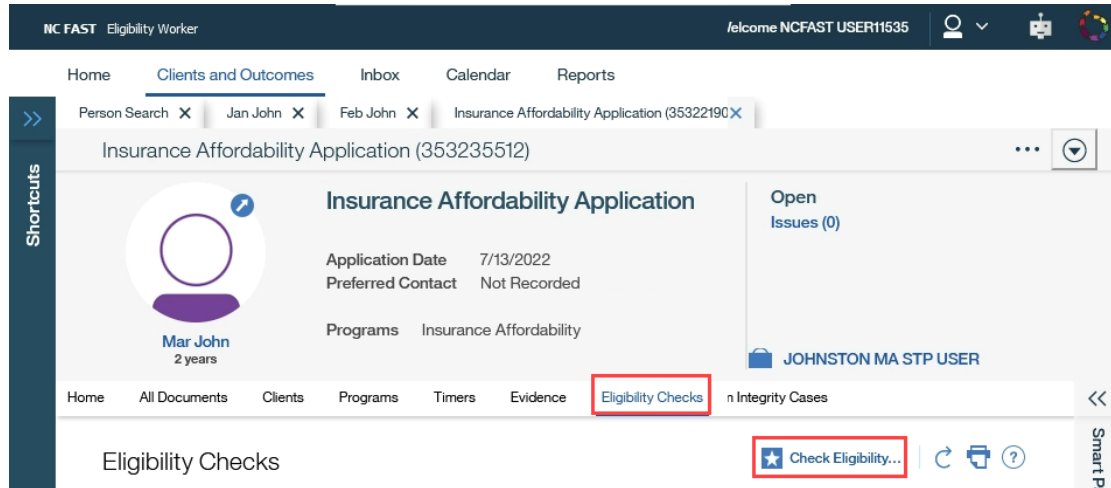
▼ Family and Children's Medicaid - MAGI

Coverage Period	Decision
▶ 3/1/2023 - 2/29/2024	Eligible
▶ 4/1/2022 - 2/28/2023	Eligible
▶ 10/1/2021 - 3/31/2022	Eligible
▶ 4/1/2021 - 9/30/2021	Eligible
▶ 3/1/2021 - 3/31/2021	Eligible
▶ 12/1/2020 - 2/28/2021	Eligible

Insurance Affordability Application Case (IAAC)

- Navigate to the Eligibility Checks tab of the Insurance Affordability Application Case (IAAC).
- Navigate to the **Eligibility Checks** tab.

3. Click the **Check Eligibility** hyperlink.



4. The Check Eligibility pop-up displays then click **Yes**.

Note: If the system detects evidence errors, an error will display. The worker should correct any evidence errors prior to checking eligibility.

Check Eligibility



Are you sure you want to check eligibility?

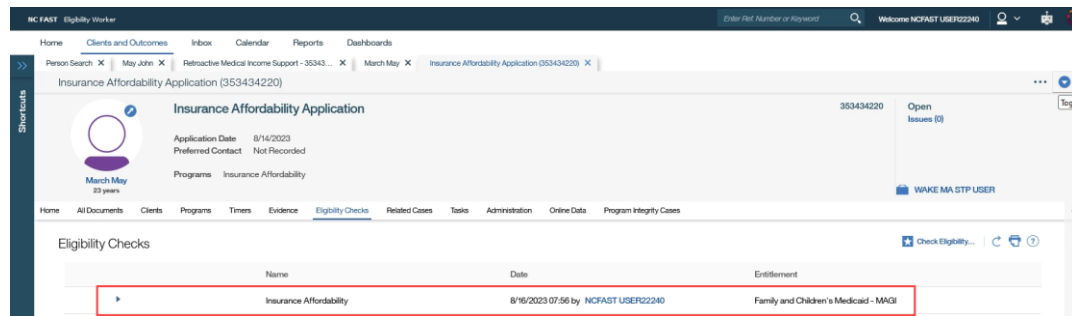
Yes

No

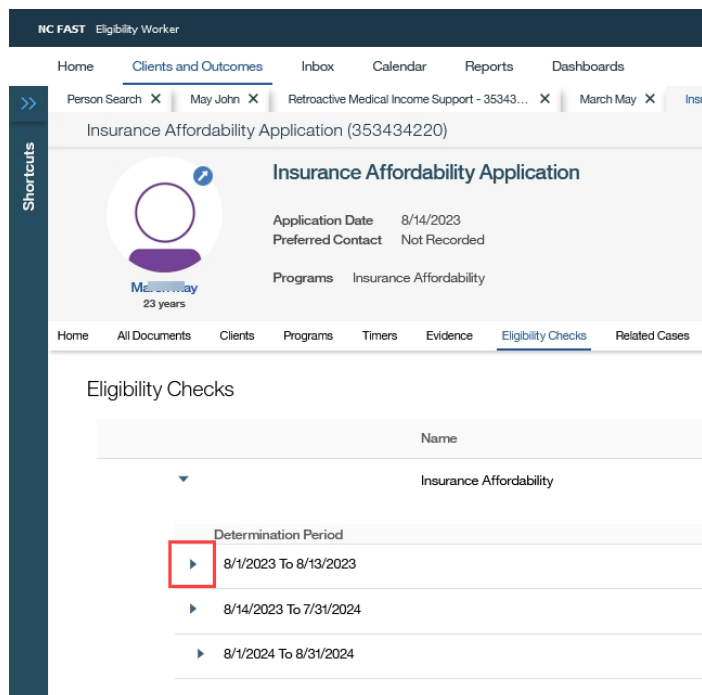
5. The Eligibility Checks page displays.

Note: The most recent Eligibility Check appears at the top of the list.

6. All Eligibility Checks display as separate line items.
7. Eligible Coverage Periods display.



8. To review more information, click the **toggle**.



Check Eligibility Results

1. Click the **Eligibility Checks** tab.
 - a. On an **IAAC**, click the **toggle** next to the Program name to expand and view the Determination Periods.
 - b. Click the **toggle** to expand and view the Determination Periods.

2. The Determination Periods are grouped based on the eligibility decision and the eligibility of household member(s). When there is a change in eligibility, the new eligibility changes are displayed in another Determination Period.

Note: The total span of the Determination Periods is 13 months starting from the application month.

Eligible Programs/InEligible Programs Tabs

The Eligible Programs and Ineligible Programs tabs display the product types for which eligibility was determined for each Determination Period. This includes Family and Children's, Emergency MAGI, and Forced Eligibility. A product type will be displayed on the Eligible Programs tab if at least one household member is found to be eligible for that program. If no household members are found to be eligible for a specific program, that product type will be displayed on the Ineligible Programs tab.

1. Click the **toggle** next to each Determination Period to view the Eligible and InEligible Programs tabs.
2. Click the **Eligible Programs** tab within each Determination Period to view the Program, Coverage Type, Eligible Members, and InEligible Members for that period.

Notes: Clicking the **Program Name** hyperlink for each Determination Period, displays the Decision for that Program type. Summary Page displays for Determination Period.

Note: Clicking the **Name hyperlink** routes the worker to the Person Page.

Eligible Programs Tab – Retroactive

When a Retroactive Insurance Affordability application is present the retroactive period for the specific program will be displayed on the Eligible Programs or InEligible Programs tabs.

1. Click the **Eligibility Checks** tab, then click the **toggle** next to Retroactive Insurance Affordability to expand and view the Eligible Programs and InEligible Programs tabs for Retroactive Insurance Affordability Application Determination Period.

2. Click the **Eligible Programs** and/or **InEligible Programs** tab within the Determination Period to view the Program, Coverage Type, Eligible Members, and Ineligible Members for that period.

Note: Clicking the **Program Name** hyperlink opens the Retro Insurance Affordability Application Decision page for that program.

Ineligible Programs Tab

The Eligible Programs and InEligible Program tabs display the product types for which eligibility was determined for each Determination Period. This includes Family and Children's, Emergency MAGI, and Forced Eligibility. If no household members are found to be eligible for a specific program, that product type will be displayed on the InEligible Programs tab.

1. Click the **InEligible Programs** tab. The Program column and Member name column are displayed.

Notes:

- The Program column displays the list of ineligible programs.
- Non-Applicants will not be displayed under the Ineligible Program tab.
- Clicking the **Program Name** hyperlink opens the Decision page for that program.

InEligible Programs Tab- Retroactive

The InEligible Programs tab for Retroactive Insurance Affordability Applications will display the list of Ineligible programs for the Retroactive Determination Period.

1. Click the **InEligible Programs** tab. The Program column and Member name column are displayed.

Notes:

- The Program column displays the list of ineligible programs.
- Non-Applicants will not be displayed under the InEligible Programs tab.

- Clicking the **Program Name** hyperlink opens the Decision page for that program.

Decision Page – Family and Children’s Medicaid, and Emergency Medicaid

The Decision Page is now displayed on a new page. For both eligible and ineligible decisions, the display format will be the same.

1. Click **Family and Children’s Medicaid** or **Emergency Medicaid** to view the Decision page for the specific program. The Decision page defaults to the Summary tab.

Note: The Decision page contains three tabs: Summary, Non-Financial and Income

Decision Page – Forced Medical

1. Click either the **Eligible Programs** or **InEligible Programs** tabs to display the Decision page for Forced Medical. The Decision page displays and defaults to the Summary tab.

Notes:

- NC FAST will display the names of members who have not applied for coverage.
- The Forced Medical Decision Page does not display Non-Financial and Income Columns.

Summary Tab

The Summary tab lists an overview of eligibility results for each applicant.

1. To see Decision Summary pages on IAIC follow step below. Click the **Toggle** next to the date.

NC FAST Eligibility Worker

Home Clients and Outcomes Inbox Calendar Reports Dashboards

Person Search X Mom Test May X Insurance Affordability Application (353435643) X Retro Insurance Affordability Application (353435645) X

Retro Insurance Affordability Application (353435645)

Retro Insurance Affordability Application

Application Date 8/16/2023
Preferred Contact Not Recorded
Programs Retroactive Insurance Affordability

Home All Documents Clients Programs Timers Evidence Eligibility Checks Related Cases Tasks Administration Online Data Program Integrity Cases

Eligibility Checks

Name	Date
Retroactive Insurance Affordability	8/16/2023 13:50 by NCFast USER22240

- Click the second **toggle** next to the program name then click the **Coverage Period** date hyperlink to see Decision Summary page.

NC FAST Eligibility Worker

Home Clients and Outcomes Inbox Calendar Reports Dashboards

Person Search X Mom Test May X Insurance Affordability Application (353435643) X Retro Insurance Affordability Application (353435645) X

Retro Insurance Affordability Application (353435645)

Retro Insurance Affordability Application

Application Date 8/16/2023
Preferred Contact Not Recorded
Programs Retroactive Insurance Affordability

Home All Documents Clients Programs Timers Evidence Eligibility Checks Related Cases

Eligibility Checks

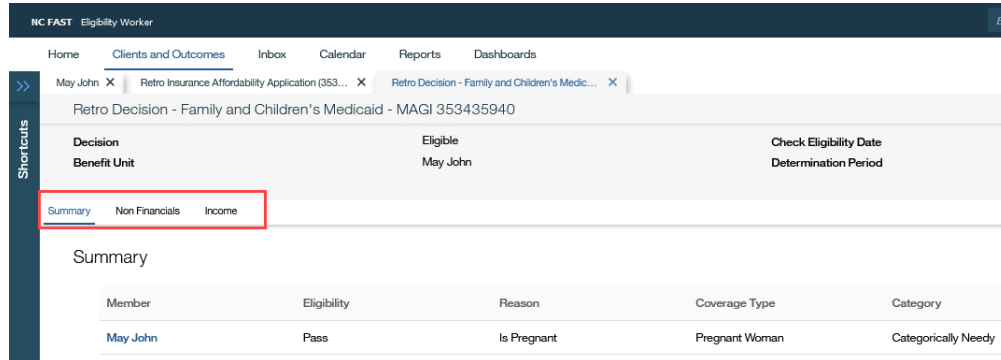
Name
Retroactive Insurance Affordability

Determination Period

5/1/2023 To 5/1/2023
5/2/2023 To 5/31/2023
6/1/2023 To 6/30/2023
7/1/2023 To 7/31/2023

3. The Decision Summary page displays and has the following tabs.

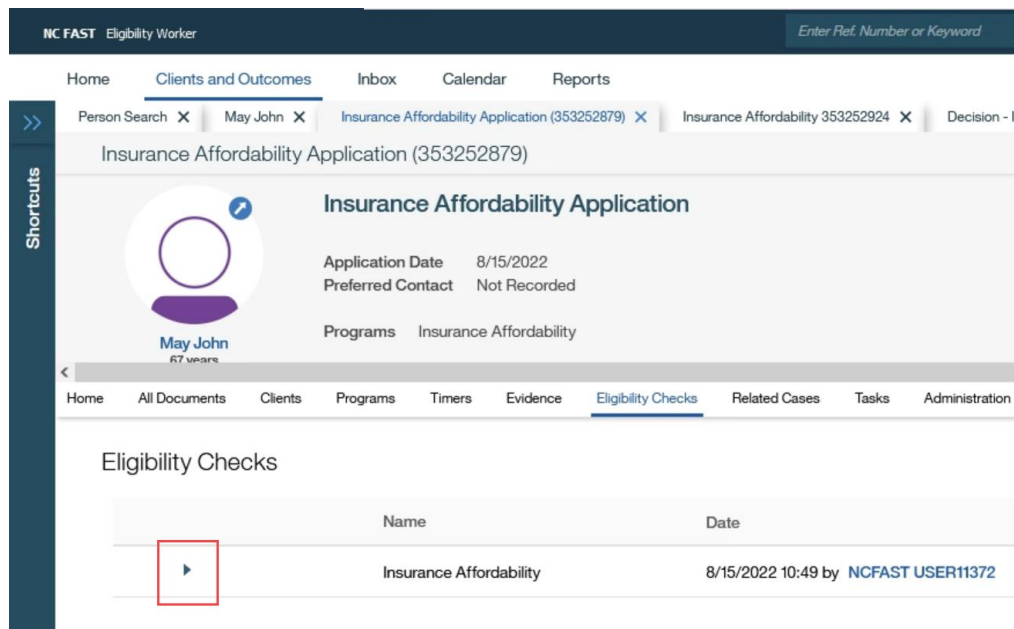
- a. Summary
- b. Non-Financial
- c. Income



The screenshot shows the NC FAST Eligibility Worker interface. The top navigation bar includes Home, Clients and Outcomes, Inbox, Calendar, Reports, and Dashboards. The main content area displays a decision summary for May John, with tabs for Summary, Non Financials, and Income. The Summary tab is selected, showing a table with columns: Member, Eligibility, Reason, Coverage Type, and Category. The data row shows May John, Pass, Is Pregnant, Pregnant Woman, and Categorically Needy.

Member	Eligibility	Reason	Coverage Type	Category
May John	Pass	Is Pregnant	Pregnant Woman	Categorically Needy

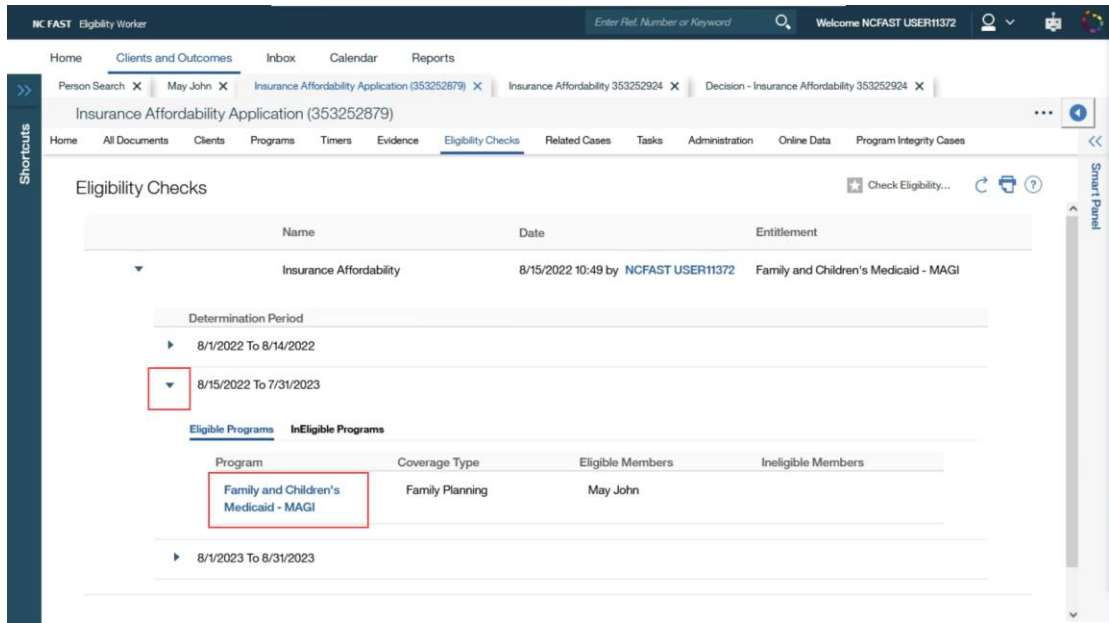
4. To see Decision Summary pages on IAAC click **toggle** next to the Insurance Affordability Name.



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 an Insurance Affordability Application for May John. The application date is 8/15/2022, and the preferred contact is Not Recorded. The programs listed are Insurance Affordability. Below the application details, there is a table with columns: Name, Date, and a toggle button. The data row shows Insurance Affordability, 8/15/2022 10:49 by NCFast USER11372, and a toggle button.

Name	Date	
Insurance Affordability	8/15/2022 10:49 by NCFast USER11372	<input type="checkbox"/>

5. Click the second **toggle** next to the Date then click the applicable **Program** to see Decision Summary page.



NC FAST Eligibility Worker

Enter Ref. Number or Keyword

Welcome NCFASST USER11372

Home Clients and Outcomes Inbox Calendar Reports

Person Search X May John X Insurance Affordability Application (353252879) X Insurance Affordability 353252924 X Decision - Insurance Affordability 353252924 X

Insurance Affordability Application (353252879)

Home All Documents Clients Programs Timers Evidence Eligibility Checks Related Cases Tasks Administration Online Data Program Integrity Cases

Eligibility Checks

Check Eligibility...

Name	Date	Entitlement
Insurance Affordability	8/15/2022 10:49 by NCFASST USER11372	Family and Children's Medicaid - MAGI

Determination Period

8/1/2022 To 8/14/2022

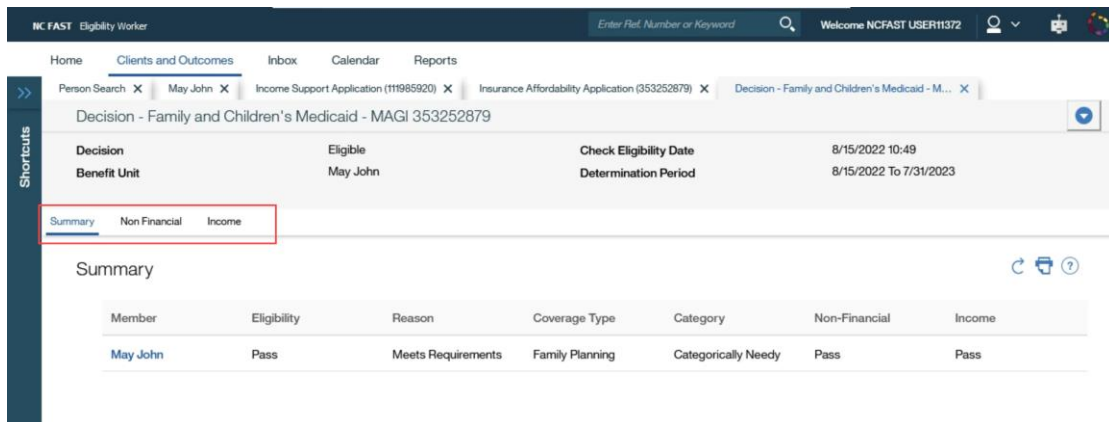
8/15/2022 To 7/31/2023

Eligible Programs Ineligible Programs

Program	Coverage Type	Eligible Members	Ineligible Members
Family and Children's Medicaid - MAGI	Family Planning	May John	

8/1/2023 To 8/31/2023

6. The Decision Summary page displays and the following tab displays.
 - a. Summary
 - b. Non-Financial
 - c. Income



NC FAST Eligibility Worker

Enter Ref. Number or Keyword

Welcome NCFASST USER11372

Home Clients and Outcomes Inbox Calendar Reports

Person Search X May John X Income Support Application (111985920) X Insurance Affordability Application (353252879) X Decision - Family and Children's Medicaid - M...

Decision - Family and Children's Medicaid - MAGI 353252879

Decision Eligible Check Eligibility Date 8/15/2022 10:49

Benefit Unit May John Determination Period 8/15/2022 To 7/31/2023

Summary Non Financial Income

Summary

Member	Eligibility	Reason	Coverage Type	Category	Non-Financial	Income
May John	Pass	Meets Requirements	Family Planning	Categorically Needy	Pass	Pass

Notes:

- The **Eligibility** column displays the eligibility decision for the member. The results will display "Pass" if the member is eligible, or

display “Fail” if the member is ineligible. This column may also be blank for a non-applicant.

- The **Reason** column displays the reason for passing or failing eligibility for each applicant.
- The **Coverage** and **Category** type columns will be blank for applicants who do not request specific coverage such as Forced MAGI Applications and Emergency MAGI applications.
- The **Non-Financial** column will display “Pass” for a member who passes the non-financial rules, “Fail” for a member who failed non-financial rules, “Undetermined” for a member who the non-financial rules were not used, and blank for non-applicants.
- The **Income** column displays the income rules results. The results will display “Pass” for the member who passed the income rules, “Fail” for the member who failed the income rules, “Undetermined” for the member the income rules were not used, and blank for non-applicants.
- For Family and Children’s MAGI Medicaid, non-applicants are also listed in the members list.
- The **Non-Financial** column and **Income** column will not populate on the Summary Tab of a Forced MAGI Application

Non-Financial Tab

The Non-Financial tab displays non-financial results for applicants.

1. Click the **Non-Financial** tab.

Notes:

- The Name column displays the name of the applicant for whom the **Non-Financial** eligibility is determined.
- The **Non-Financial Eligibility** column displays the eligibility result as *Pass* or *Fail*.
- Non-applicants are not listed.

2. Click the **toggle** to expand the segment.

Notes:

- There are six non-financial rules, which include:
 - i. Residency
 - ii. Citizenship
 - iii. Social Security Number
 - iv. Incarceration
 - v. Third Party Liability
 - vi. Institution Details
- Each Non-Financial rule result will display *Pass*, *Fail*, or *Not Applicable* in the Eligibility Column and the reason.
- The Reason Column will populate with the reason that the household member passed, failed or the Non-Financial rule was not applicable.

Income Tab IAAC and IAIC

The Income tab displays the detailed results of the income rules set for the applicant.

1. This is for an IAAC. Click the **Income** tab then click the **Income Folder**. The page defaults to the MAGI Household folder.

Notes:

- The Member column displays for each applicant for whom the income rules were completed.
- Monthly Household Income
- Monthly Household Income with 5% Disregard
- Family Size
- Income Limit
- FPL Threshold for Category
- Income percentage of FPL
- Eligibility

NC FAST Eligibility Worker Enter Ref. Number or Keyword Welcome NCFAS USER11372

Home Clients and Outcomes Inbox Calendar Reports

Person Search X May John X Insurance Affordability Application (353252879) X Decision - Family and Children's Medicaid - M... X

Decision - Family and Children's Medicaid - MAGI 353252879

Decision Eligible Check Eligibility Date 8/15/2022 10:49
Benefit Unit May John Determination Period 8/15/2022 To 7/31/2023

Summary Non Financial Income

MAGI Household

Income

Income Details

Member MAGI Based Income

Income Eligibility

Member	Monthly Household Income	Monthly Household Income with 5% Disregard	Family Size	Income Limit	FPL Threshold for Category	Income percentage of FPL	Eligibility
May John	\$0.00	\$0.00	1	\$2,209.00	195% (without 5% disregard)	0%	Family Planning

- This is for an IAIC Click the Income tab then click the **Income Folder**. The page defaults to the MAGI Household folder.

Notes:

- The Member column displays for each applicant for whom the income rules were completed.
- Monthly Household Income
- Monthly Household Income with 5% Disregard
- Family Size
- FPL (monthly) for Household
- Income percentage of FPL
- Eligibility



North Carolina Families Accessing Services through Technology

https://scc9205.its.state.nc.us:10082/Curam/en_US/ProductDelivery_resolveDecisionDisplayTabPage.do?determin...riodsForDeterminationForICPage.do?nfHCRIICheckDeterDataID=2741554499&o3ctx=12288&o3nocache=1660589847611_0

- Click the **toggle** to expand the segment to view the Income Counted Information.

Notes:

- The **Member** column displays each member of the applicant's MAGI household.
- The **Income Counted** column displays whether the household member's income is being counted.
- The **Reason** column displays the reason the income from the household member is either counted or not counted for the applicant.
- Total countable income for the applicant.