

MAGI Medicaid Recertification

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Table of Contents

Overview	1
Step-by-Step Instructions.....	2
Create the new recertification on the MAGI PDC.....	2
Evidence Review and Management for Recertification (on the Insurance Affordability Integrated Case).....	5
Submit the recertification.	7
Verify that client Benefit History matches PDC Determination	8

Overview

This job aid explains how to recertify a MAGI case. It is organized into the following sequential actions:

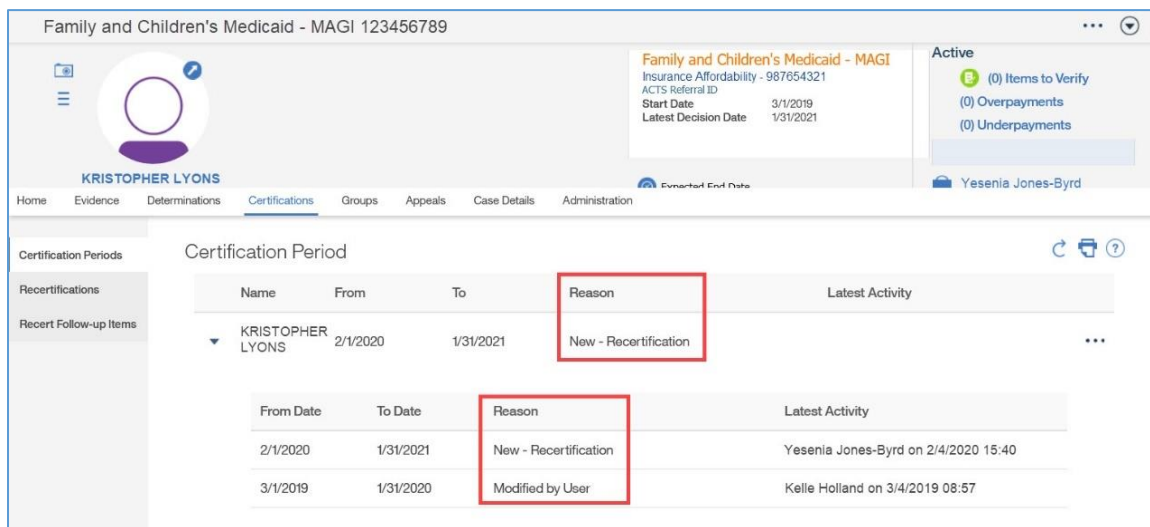
- Create the new recertification on the MAGI Product Delivery Case (PDC).
- Perform and document a review of the evidence on the Insurance Affordability Integrated Case (IAIC).
- Submit the recertification and verify the change decision created for the new certification period matches expected eligibility.
- Verify the Benefit History for the recipient is generated correctly.

Notes:

- Caseworkers can use the ex-parte process for any Medicaid recertification.
- Do not use the steps in this job aid for recertifications on MAGI Forced Eligibility cases. To recertify a Forced Eligibility case for a client who will still be eligible for a program covered by Forced Eligibility, refer to the list of *Approved Uses of Forced Eligibility* and the *MAGI – Medicaid Forced Eligibility & Ex-Parte/Admin Recertification* job aid for guidance.
- One difference between recertifications for Income Support and Insurance Affordability cases is that each recipient included on the MAGI PDC has an individual certification

period. These certification periods may differ. For example, when a newborn is later added to the IAIC which governs an active MAGI case, the newborn's certification period likely ends later than the other household members' certification periods. Caseworkers can align differing certification periods for clients on the same MAGI PDC, in accordance with Medicaid policy and procedures. This would allow the caseworkers to recertify MAGI Medicaid recipients whose certification periods are aligned on the same PDC at the same time. Consult the *MAGI Medicaid Individual Certification Periods* job aid for guidance.

- To streamline case management, caseworkers should consolidate household members on one IAIC (instead of trying to manage multiple, separate IAICs). The caseworker should do this before beginning the recertification process. This ensures that all recipients in the household with the same certification period end date can be recertified together.
- The PDC's Certification Period page lists the reason for each client's individual certification period. Reasons include Existing – No Change, New – Recertification, and Modified by User. The latest activity on the case — whether a caseworker or NC FAST altered the case — also appears on this page. Follow steps 1-3 below to access the Certification Period page.



Family and Children's Medicaid - MAGI 123456789

KRISTOPHER LYONS

Home Evidence Determinations **Certifications** Groups Appeals Case Details Administration

Family and Children's Medicaid - MAGI
Insurance Affordability - 987654321
ACTS Referral ID
Start Date 3/1/2019
Latest Decision Date 1/31/2021

Active
(0) Items to Verify
(0) Overpayments
(0) Underpayments
Yesenia Jones-Byrd

Certification Periods

Certification Period

Name	From	To	Reason	Latest Activity
KRISTOPHER LYONS	2/1/2020	1/31/2021	New - Recertification	

From Date	To Date	Reason	Latest Activity
2/1/2020	1/31/2021	New - Recertification	Yesenia Jones-Byrd on 2/4/2020 15:40
3/1/2019	1/31/2020	Modified by User	Kelle Holland on 3/4/2019 08:57

Step-by-Step Instructions

Create the new recertification on the MAGI PDC

1. Navigate to the MAGI PDC. Consult the *Viewing My Recertifications* job aid for guidance.

2. The MAGI PDC Home Page displays. Verify the case status in the Context Panel then click the **Certifications** tab.
3. The Certification Period page displays. Verify the certification period end date. Determine which situation below — a, b, or c — is applicable prior to continuing to step 4 to start the recertification.
 - a. If the case is *Active* and the caseworker is processing the recertification in a timely manner, continue to step 4 below.
 - b. If the PDC is *Suspended*, the caseworker should move the case back to *Active* status prior to initiating the recertification. Complete the following before progressing to step 4 below.
 - i. On the suspended PDC, click the **Tab Actions Menu** then select **Unsuspend**.
 - ii. The Unsuspend Case pop-up appears. Select the applicable **Reason** and enter applicable comments. Click **Save**.
 - iii. The PDC returns to *Open* status. Click the **Tab Actions Menu** then select **Submit for Approval**.

Note: If the case status displays *Delayed Processing Pending*, click the refresh icon until the status changes to *Approved*.
 - iv. The PDC displays in *Approved* status. Click the **Tab Actions Menu** then select **Activate Case**.

Note: If case status changes to *Delayed Processing Pending*, click the **refresh** icon until the status changes to *Active*.
 - v. The Certification Period page displays. PDC status is now *Active*. Continue to step 4 below.
 - c. If PDC status is *Closed*, the caseworker should reactivate the case prior to initiating the recertification. Complete the following before progressing to step 4 below:

Note: Generally, the PDC should only be reopened if the information needed to establish eligibility is provided within 90 days of the closure date of the PDC; however, if the PDC needs to be reopened beyond this time because of a different issue, such as a QA finding, this process can also be utilized.

 - i. On the closed PDC, click the **Tab Actions Menu** then select **Reactivate Case**.

- ii. The Reactivate Case pop-up appears. Select the applicable **Reason** and enter comments. Click **Save**.
- iii. The PDC returns to *Open* status. Click the **Tab Actions Menu** then select **Submit for Approval**.
- iv. The Submit Case for Approval pop-up appears. Click **Yes**.

Note: If case status changes to *Delayed Processing Pending*, click the **refresh** icon until the status changes to *Approved*.

- v. The PDC returns to *Approved* status. Click the **Tab Actions Menu** then select **Activate Case**.
- vi. The **Activate Case** pop-up appears. Click **Yes**.

Notes:

- If the case status changes to *Delayed Processing Pending*, click the **refresh** icon until the status changes to *Active*.
- If the caseworker is attempting to recertify the PDC after the certification period for any client on the case has ended (and no notice has been sent), do the following:
 - Add Medical Continued Eligibility evidence on the PDC to extend eligibility and allow time to complete the recertification. Follow guidance in the *Continued Eligibility for Medical Assistance* job aid.
 - If the required information is not available to complete the recertification process at the time of extension, then stop the process here and restart at step 1 when information is received.

4. The Certification Period page displays. Click the **Recertifications** folder.
5. The Recertification page displays. Click the **New** hyperlink.
6. The New Recertification pop-up appears. Enter and select the applicable information for the new certification period. Select the **checkbox** associated with the name of each applicable Household Member then click **Save**.

Notes:

- If certification periods for MAGI beneficiaries in the household are aligned, the caseworker can select the checkboxes associated with multiple individuals on the New Recertification pop-up.

- For ex-parte reviews, enter the date the caseworker began the recertification process in the Date Received text field.
7. The Recertification page displays. The recertification status is *In Progress*. Repeat steps 1-6 above for any other PDC(s) attached to the IAIC that requires recertification.

Evidence Review and Management for Recertification (on the Insurance Affordability Integrated Case)

1. To navigate to the Insurance Affordability case associated with the MAGI PDC, click the **Insurance Affordability** case hyperlink in the Context Panel.
2. The Home page of the IAIC displays. Click the **Online Data** tab.
3. The Online Data Requests page displays. Request online data sources as applicable.
4. Online data sources results display. Consult the *Requesting and Viewing Online Data (OVS)*, *SAVE Automation Verification*, and *The Work Number (TWN)* job aids for guidance on examining results. Click the **Evidence** tab.
5. The Evidence Dashboard displays. Manage applicable evidence then click the **Verifications** folder.

Notes:

- If the caseworker needs more information from the client to process the recertification, generate and send the NCFast-20020 form. When applicable send the DHB-5097 in conjunction with the NCFast-20020. These forms should be created in NC FAST as a New Pro Forma. Refer to *Forms Reference Guide* job aid for guidance. Create a task as a reminder to follow-up on the required information for the recertification. Consult the *Creating Tasks* job aid for guidance.
- If the client does not provide required verifications or fails to apply for all benefits required, the caseworker should add Product Exclusion evidence on the Insurance Affordability case. Select Reason Type Failure to Provide Info/Proof or Failed to Apply for all Benefits. Consult the *Program and Product Exclusion* job aid for guidance.
- At recertification, if the beneficiary provides the requested information with 90 days of termination and the Product Exclusion evidence start date includes a month that the beneficiary is now eligible for, based on the newly submitted information, the Product Exclusion evidence must be deleted so that the beneficiary will show eligible for the entire new certification period. **Example:** Original certification period ending 2/29/2024. Product Exclusion

evidence added with a Start Date of 3/1/2024. Information provided on 3/10/2024 and the beneficiary remains eligible for certification period beginning 3/1/2024. Since the Start Date of the Product Exclusion evidence includes the NEW certification period, it must be deleted as end dating it 3/31/2024 would show the beneficiary as ineligible in March 2024, which is incorrect.

- The Recertification record will need to be reopened so the status is then put back *In Progress*.
6. After all verifications are complete, select the Evidence Dashboard folder.
 7. Click the **Eligibility Checks** tab and then click the **Check Eligibility** hyperlink and verify correct determination before Applying Changes.
 8. The eligibility results display. Click the **Toggle** down to review the results. Do not proceed until applicable eligibility results are displayed.
 9. The Evidence Dashboard displays. Click the **Page Actions Menu** then select **Validate Changes** to confirm that conflicting evidence does not exist.
 10. The Validate Changes pop-up appears. Select the **checkbox(es)** associated with the evidence type(s) listed on the pop-up then click **Save**.
Note: If the Validate Changes pop-up displays any conflicting evidence, click Cancel. Manage the conflicting evidence then repeat steps 6-8 above until no conflicting evidence appears on the list.
 11. The Evidence Dashboard displays. Click the **Page Actions Menu** then select **Apply Changes** to activate In Edit evidence.
 12. The Apply Changes pop-up appears. Select the **checkbox(es)** associated with relevant In Edit evidence types then click **Save**.

Notes:

- NC FAST will not allow a caseworker to Apply Changes unless the recertification status on the PDC is *In Progress*. If the recertification status is *submitted*, perform the following steps:
 - i. Click the **List Actions Menu** associated with the recertification then select **Reject**.
 - ii. The Reject Recertification pop-up appears. Click **Yes**.
 - iii. The Recertification page displays. The status of the new recertification period returns to *In Progress*.

- If a changed decision affects the current certification period, then react to that change before proceeding to the next section. Refer to *Working with Changed Decisions on Income Support and Insurance Affordability Cases* job aid.

Submit the recertification.

1. Navigate to the Recertification page on the PDC, click the **Family and Children's Medicaid – MAGI** tab.
2. Click **Submit**.
3. The Submit for Approval pop-up appears. Select the **checkbox** associated with each Household Member included on the recertification then click **Save**.
4. The Recertification page displays. The status of the recertification is now *Submitted*. Click the **Certification Periods** folder.
5. The Certification Period page displays. The new certification period is now listed. Click the **Determinations** tab to review the new certification period's eligibility decision(s).

Note: If the certification period is not correct reject the recertification and manage evidence again. Start back at step 5 in the Evidence Review and Management for Recertification (on the Insurance Affordability Integrated Case) section.

6. When correct eligibility for the new certification period is displayed. Navigate to IAIC and review the Changed Decision, Click the **List Actions Menu** associated with the Changed Decision. Select either **Accept w/ Timely** or **Accept w/ Adequate**. Consult the *Working with Changed Decisions on Income Support and Insurance Affordability Cases* job aid for guidance. Repeat this step for each Changed Decision listed, if applicable.
7. Accepting the Changed Decision triggers the DSS-8110 wizard. NC FAST generates a reason and associated outcome on the wizard for the client(s) affected by the Changed Decision. NC FAST generates a suggested reason and outcome. The reason and outcome can also be selected manually.
8. If a manually generated Pro Forma of the DSS-8110 is needed, click on the **Case Details** tab then click the **Communications** folder.
9. Click the **Page Actions Menu** then select the **New Pro Forma** hyperlink.
10. The New Pro Forma pop-up appears. Select **Notice** from the dropdown then select the **DSS-8110**.
11. The DSS-8110 wizard appears, complete the wizard accordingly.

Verify that client **Benefit History** matches **PDC Determination**

1. Navigate to the Medicaid recipient's Person page to verify the new certification period.
2. The recipient's Person page displays click the **Benefit History** tab.
3. The Individual Eligibility page displays. Enter the new certification period's **start date** in the *Date From* text field then click **Search**.
4. Individual Eligibility for the new certification period is displayed. Verify the coverage shown matches the Determination on the MAGI PDC. For more details on the benefit, click the **toggle** for each Eligibility Period listed.

Notes:

- Repeat steps 1-4 above for each recipient included in the recertification.
- If Benefit History for any segment of the new certification period does not match PDC Determination and expected eligibility, make sure that the latest accepted determination on the Product Delivery Case is correct. If it is correct but differs from Benefit History, submit a ServiceNow ticket to the NC FAST Help Desk. NC FAST will then correct the ongoing Benefit History segments.