

# Removing a Client from a MAGI Application

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Last Review: 08/07/223

## Table of Contents:

Overview .....	1
Step-by-Step Instructions.....	1
Navigation to Application .....	2
Managing Evidence .....	3
Final Removal from Application.....	5

## Overview

This Job Aid should only be used in specific instances and careful consideration must be given when removing a person from a MAGI application.

For example, in the instance that a MAGI application is received through ePASS or FFM which includes a household member who is not an applicant and who does not impact eligibility for any other household members, removing this erroneous household member should be completed using the process outlined in this Job Aid.

If removing an applicant from a MAGI Application to enter a separate application for this applicant, caseworkers must ensure that the eligibility for this applicant is evaluated properly by ensuring the information entered on the new application aligns with the information provided on the initial application, including date of application.

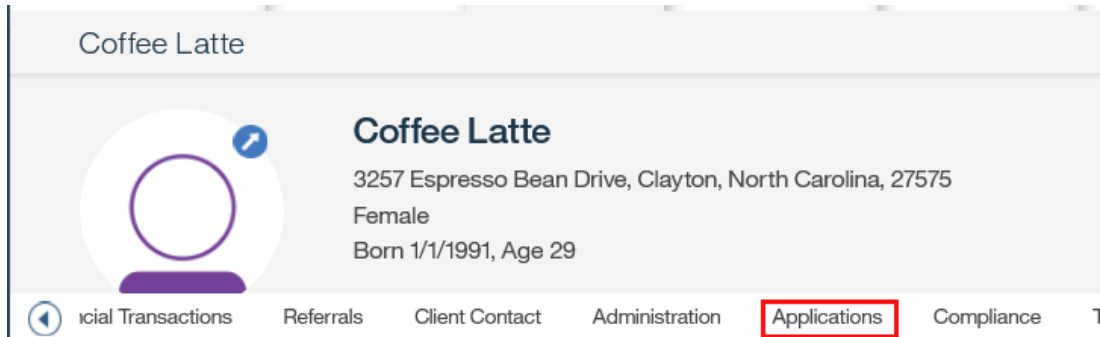
### Notes:

- NC FAST does not allow users to remove the Head of Household (i.e., case head or “Primary Client”) from an application.
- The caseworker must designate another household member as the Primary Client in NC FAST, if applicable before proceeding with this job aid.
- Caseworkers will not be able to remove a client if the client is the only applicant.
- This process can be used for both prospect and registered clients on an application.

## Step-by-Step Instructions

## Navigation to Application

1. From the Head of Household's Person page, click the **Application** tab.

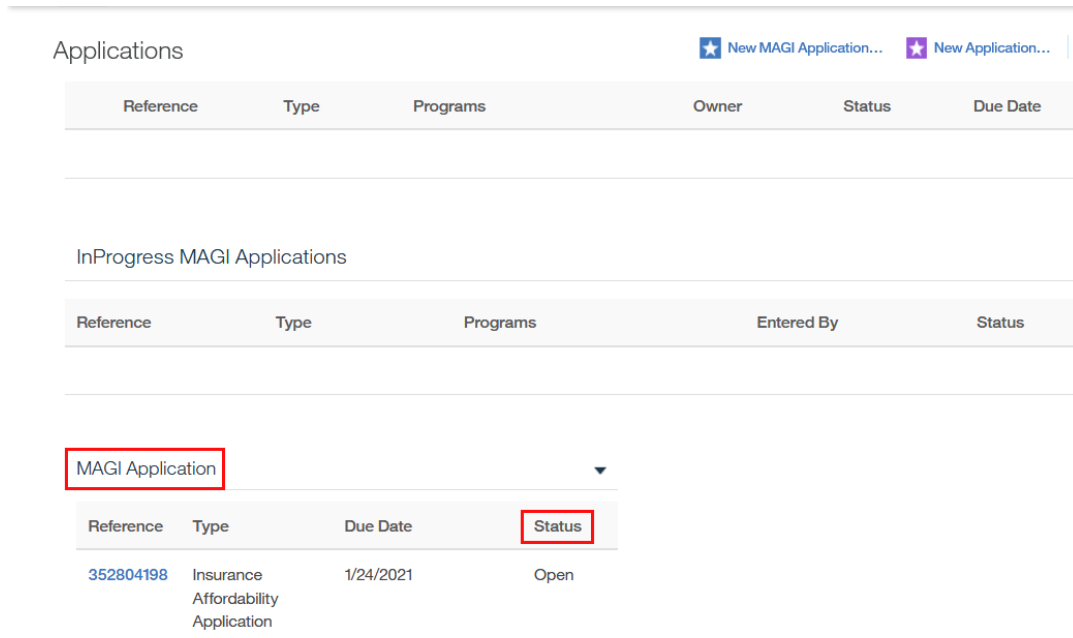


Coffee Latte

**Coffee Latte**  
3257 Espresso Bean Drive, Clayton, North Carolina, 27575  
Female  
Born 1/1/1991, Age 29

[Social Transactions](#)
[Referrals](#)
[Client Contact](#)
[Administration](#)
[Applications](#)
[Compliance](#)

2. The applications page displays. Locate the submitted application in the MAGI Application section.



Applications [New MAGI Application...](#) [New Application...](#)

Reference	Type	Programs	Owner	Status	Due Date

InProgress MAGI Applications

Reference	Type	Programs	Entered By	Status

MAGI Application

Reference	Type	Due Date	Status
<a href="#">352804198</a>	Insurance Affordability Application	1/24/2021	Open

**Note:** Applications that have been submitted but not disposed will have a status of *Open*.

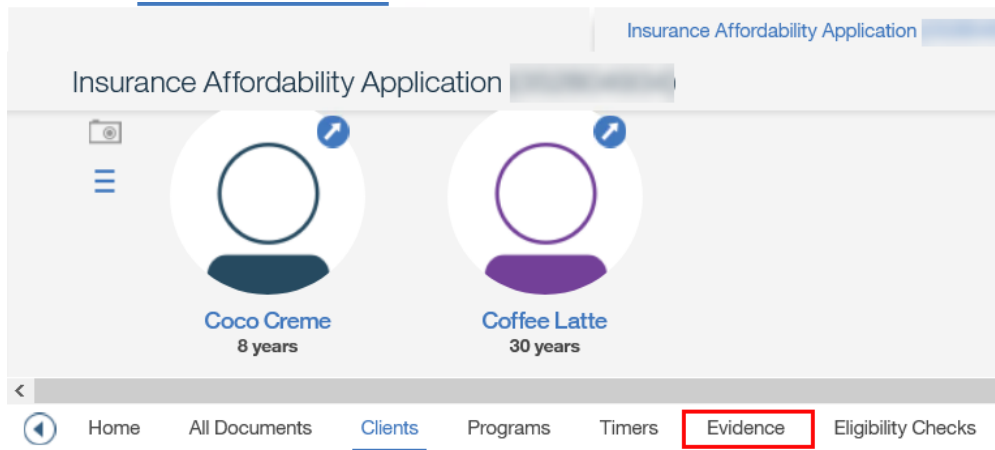
3. Click the applicable Reference number **hyperlink** for the Insurance Affordability Application.

## MAGI Application

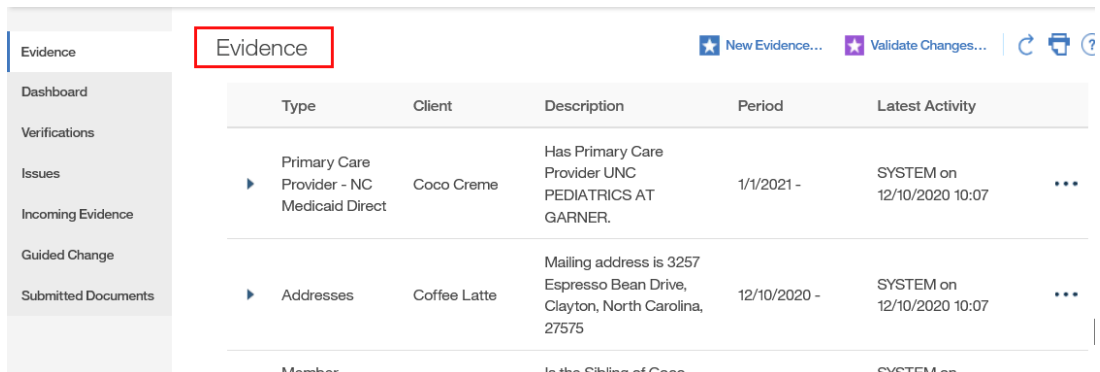
Reference	Type	Due Date	Status
352804198	Insurance Affordability Application	1/24/2021	Open

## Managing Evidence

1. The Insurance Affordability Application page displays. Click the **Evidence** tab.



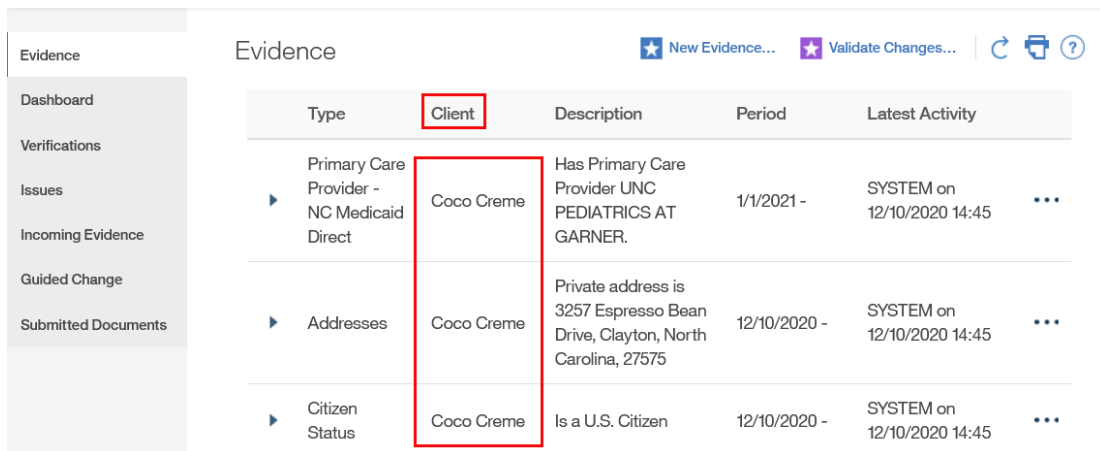
2. The Evidence page displays.



Type	Client	Description	Period	Latest Activity
Primary Care Provider - NC Medicaid Direct	Coco Creme	Has Primary Care Provider UNC PEDIATRICS AT GARNER.	1/1/2021 -	SYSTEM on 12/10/2020 10:07
Addresses	Coffee Latte	Mailing address is 3257 Espresso Bean Drive, Clayton, North Carolina, 27575	12/10/2020 -	SYSTEM on 12/10/2020 10:07

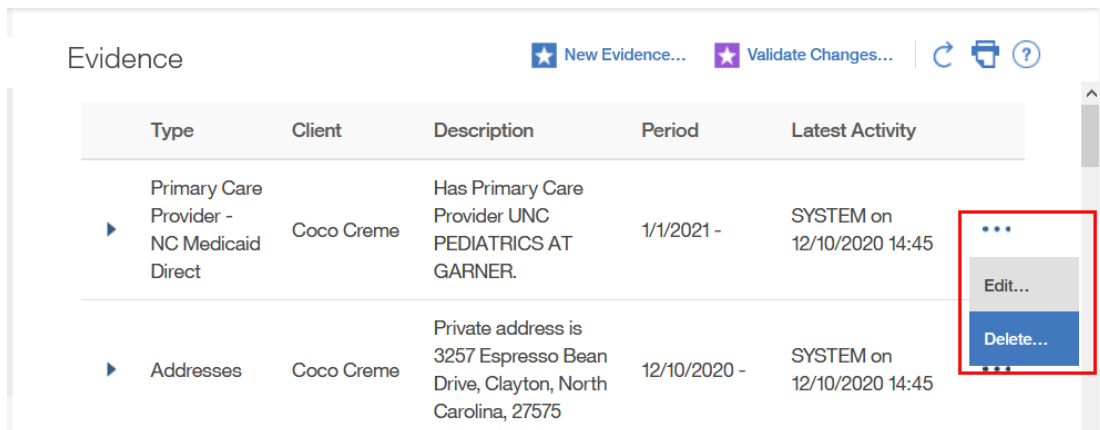
## Notes:

- If the Primary Client is being removed, another Primary Client must be designated before proceeding. This is done by editing Application Details evidence for another applicant on the case.
  - All evidence associated with the client must first be removed before removing the client from the application.
3. Click the **Client** header. The list of evidence types will sort by Client on the application.



Evidence					
Type	Client	Description	Period	Latest Activity	
Primary Care Provider - NC Medicaid Direct	Coco Creme	Has Primary Care Provider UNC PEDIATRICS AT GARNER.	1/1/2021 -	SYSTEM on 12/10/2020 14:45	...
Addresses	Coco Creme	Private address is 3257 Espresso Bean Drive, Clayton, North Carolina, 27575	12/10/2020 -	SYSTEM on 12/10/2020 14:45	...
Citizen Status	Coco Creme	Is a U.S. Citizen	12/10/2020 -	SYSTEM on 12/10/2020 14:45	...

4. Click the **List Actions Menu** for each individual line item of evidence type pertaining to the client being removed, then select **Delete**.



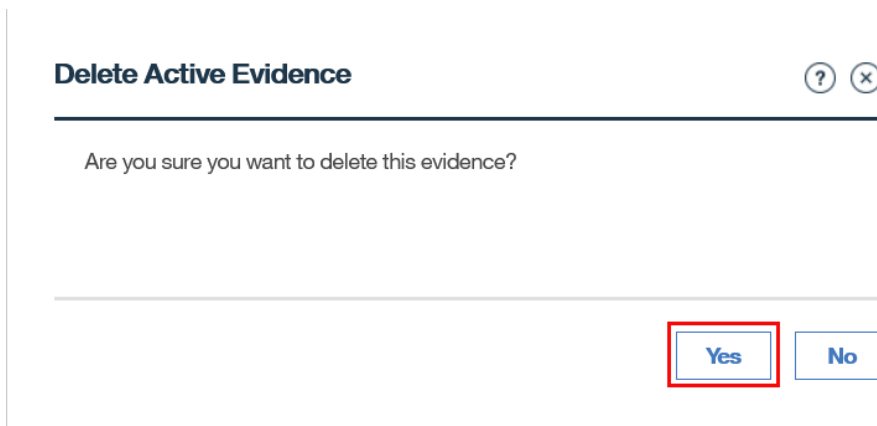
Evidence					
Type	Client	Description	Period	Latest Activity	
Primary Care Provider - NC Medicaid Direct	Coco Creme	Has Primary Care Provider UNC PEDIATRICS AT GARNER.	1/1/2021 -	SYSTEM on 12/10/2020 14:45	...
Addresses	Coco Creme	Private address is 3257 Espresso Bean Drive, Clayton, North Carolina, 27575	12/10/2020 -	SYSTEM on 12/10/2020 14:45	...

**Notes:**

- **Application Details** should be end dated using the date they are being removed from the application.

- All **Active** and **In-Edit** evidence for the client(s) that is being removed must be deleted to completely process the application.
- Evidence such as **Member Relationship** or **Absent Parent** may not contain the client's name but should be evaluated to see if it contains evidence for the client(s) being removed.
- Remember to check the **Incoming Evidence** folder to remove any evidence that is associated with the client(s) that needs to be removed from the application.

5. The Delete Active Evidence pop-up appears. Click **Yes**.



**Delete Active Evidence** ? ×

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Are you sure you want to delete this evidence?

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**Yes** **No**

6. The Evidence page displays. Repeat steps 6-9 until all pieces of evidence for the client are removed from the application.

### Final Removal from Application

1. Once all evidence is removed for the designated client, click the **Clients** tab. The Current Clients page displays.

Insurance Affordability Application (352804934) X

Insurance Affordability Application (352804934)

Insurance Affordability Application 352804934

Application Date 12/10/2020  
Preferred Contact Not Recorded  
Programs Insurance Affordability

Coco Creme 8 years  
Coffee Latte 30 years

Home All Documents **Clients** Programs Timers Evidence Eligibility Checks Related Cases Tasks Administration

Current Clients **Current Clients** Find Client... ?

Name	Date of Birth	Reference	Registered
Coco Creme	12/31/2012	263251233	Yes
Coffee Latte	1/1/1991	263251232	Yes

- Click the **List Actions Menu** for the client that needs to be removed from the application, then select **Remove Client**.

Current Clients Find Client... ?

Coco Creme	12/31/2012	263251233	Yes	...
Coffee Latte	1/1/1991	263251232	Yes	...

Match Client...  
Potential Match...  
**Remove Client...**

- The Remove Client pop-up appears. Click **Yes**.

## Remove Client



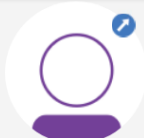
Are you sure you want to remove the client?

Yes

No

- The Current Clients page displays. The client that was removed will no longer display on this page. Only the remaining client(s) will show.

Insurance Affordability Application (352804934) ...



**Insurance Affordability Application** 35

Application Date 12/10/2020  
Preferred Contact Not Recorded

Programs Insurance Affordability

Coffee Latte  
30 years

< Home All Documents **Clients** Programs Timers Evidence Eligibility Checks Related Cases Tasks Administration >

Current Clients

Previous Clients

Current Clients ★ Find Client... ↺ 🖨 ?

Name	Date of Birth	Reference	Registered	
▶ Coffee Latte	1/1/1991	263251232	Yes	...

**Note:** Clients that have been removed from the application can be viewed in the Previous Clients folder located on this page.

- Complete the application by managing and verifying the remaining evidence and checking the eligibility.

**Note:** Please refer to the *MAGI – Application to Case* job Aid.