

# MAGI - Removing a Person from an Insurance Affordability Integrated Case (IAIC)

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## Overview

This job aid describes how to remove a person from a MAGI Insurance Affordability Integrated Case (IAIC).

### Notes:

- The process for removing individuals from an existing MAGI case involves end dating appropriate evidence associated with that person.
- If the person being removed from the case is the Case Head, a new Case Head should be appointed before the current Case Head is removed. Refer to *MAGI – Change Primary Client / Case Head* job aid for additional guidance.

## Step-by-Step Instructions

1. Navigate to the applicable IAIC.

**Note:** For more information regarding navigating to the IAIC, refer to the *Searching for Cases* job aid.

2. Click the **Evidence** tab.
3. The Evidence Dashboard displays. Move through the Evidence Dashboard and end date each piece of evidence associated with the person who is being removed as appropriate. Use the actual day of the month the person is leaving as the end date.
4. Evidence to end date may include (this is not a complete list):

- Addresses
- Application Details

**Note:** Do not uncheck the *Applicant* box. End date the evidence and add an End Reason. This will show that person was an applicant until the end date and is now no longer an applicant.

- Application Filer Consent
- Benefit

- Contact Preferences
- Demographics
- Income
- Member Relationship

**Note:** This evidence, which ends the association between members on the case, should be end dated even if there is no change in relationship. For example, if a parent is being removed from the household, the Relationship evidence, which associates the parent to a child, should be end dated even though there is no change in the relationship.

- Primary Care Provider - NC Medicaid Direct
- Residency
- End date the client on the participants tab and then in the Case Members folder to end date the Case Members.
- Tax Filing Status and Tax Relationship

**Note:** Tax Relationship is linked to Tax Filing Status and users should be careful when end dating these evidences.

For example: A household contains Mom, Dad, and Child. Existing evidence reflects that Mom and Dad are filing jointly and claim the child as a tax dependent. Some of the reported changes are that Mom has left the household, Mom and Dad are no longer filing jointly, and the child is now a tax dependent of the Dad.

There is an existing **Tax Filing Status** evidence which associates Mom and Dad as joint filers. There is also an existing **Tax Relationship** evidence for the child which associates the child to the Mom's **Tax Filing Status** evidence. Mom's **Tax Filing Status** evidence should be end dated as she is being removed from the household. The existing **Tax Filing Status** evidence for Dad and **Tax Relationship** evidence for the child should also be end dated due to the reported changes.

A new **Tax Filing Status** evidence should be created reflecting Dads updated tax filing status; also, a new **Tax Relationship** evidence should be added for the child reflecting that the child is now a tax dependent of the Dad.

5. On the Insurance Affordability case. Click the **Eligibility** tab.

**Note:** To check eligibility on an Insurance Affordability Integrated Case (IAIC) in NC FAST, please refer to the *MAGI Check Eligibility on an Insurance Affordability Integrated Case How-to Guide*.

**Note: Check Eligibility** should be completed while evidence for the person being removed is in-edit to ensure there is a correct determination prior to **Applying Changes**.

**Note:** If an incorrect eligibility determination is obtained, make necessary changes to evidence, via the **Evidence** tab, and complete the **Check Eligibility** process again.

6. Once the correct determination has been obtained via the **Check Eligibility** process, navigate to the **Evidence** tab. Click the **Page Actions Menu** then select **Apply Changes**.

**Note:** This action should reassess Product Delivery Cases (PDCs) associated with the IAIC. If the PDC's are not reassessed systematically, navigate to the PDC, click the **Determinations** tab then click the **Reassess** hyperlink to manually reassess the PDC.

7. Click the **Changed Decisions** folder to manage any On Hold decisions.
8. If On Hold Decision is appropriate, select **Accept with Timely** or **Accept with Adequate**.

**Notes:**

- Always be sure the On Hold decision is correct; if not, do not accept the decision.
- Household members are successfully removed from an IAIC using the applicable procedure described above. However, currently, the removed household member's name remains as an option on drop-down menus for working with evidence and performing other actions.