

# MAGI - Effective Date of Change

Last Updated: 07/18/2022

## Overview

On MAGI cases, Effective Date of Change should only be used when updating Income Evidence. This is the correct way to manage evidence updates during a Recertification or Change of Circumstance (CoC) on a MAGI case.

## Step-by-Step Instructions

### Effective Date of Change

1. Navigate to the Dashboard of the Insurance Affordability Case.
2. Click the **Income Evidence** hyperlink.
3. Click the **toggle**.
4. Click the **List Actions Menu**. Click **Edit**.
5. The Edit Income Wizard pop-up appears
  - a. Enter **Received Date**.
  - b. Select **Change Reason** from drop-down.
  - c. Enter date in **Effective Date of Change** field.
  - d. Click **Next**.

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1 Edit Income

2 Income Details

3 Summary

Step 1 Edit Income

Edit Income

Received Date \*

12/20/2018

Change Reason

Case Audit

Effective Date of Change

Case Participant

Case Participant

JANNA JANSEN

Income Details

Cancel

Save & Exit

Next

**Note:** Change of Circumstance during the Certification Period. If the income change occurred on 8/20/2017, enter 8/20/2017 in the Effective Date of Change field.

- e. Enter **Received Date**.
- f. Select **Change Reason** from the drop-down menu.
- g. Enter date in **Effective Date of Change** field.
- h. Click **Next**.

**Note:** If the Income Calculation section of the Income Details page includes existing pay information, those items should be removed before adding the new income calculation records. This can be done by selecting Remove for each item that should no longer be used when calculating new income monthly amount. If old income calculation is not removed, the old and new amounts are averaged together making the new income amount incorrect.

- i. Enter **Pay Period Hours**.
- j. Enter **Date Paid**.
- k. Enter **Pay Period Gross Amount** or **Hourly Wage Rate**.
- l. Click **Add Record**.

**Note:** Scroll down to see Income Calculation Details and comment section.

- m. Click **Next**.

- n. Click **Finish**.
6. Complete required verifications and apply changes.  
**Note:** Please refer to the *Verifications and Applying Changes to Evidence* job aid for further information.
7. Review the Determinations tab to ensure it is correct. If correct, Accept the Changed Decision.

### **Troubleshooting Tips**

Confirm the following fields are accurate:

- Effective Date of Change
- Amount
- Frequency
- Income Type
- Change Reason