477-000-002 – Renewal Process

Renewals

Always check the renewal date under Action on the N-FOCUS Master Case window for Review Due and Application Due dates.

If a program case is in AC (Active), SP (Spenddown), PD (Premium Due), TR (Transitional), or EX (Exempt) status, and the client submits a new application instead of the renewal, the application needs to be tied to the Medicaid case and no further action is needed.

The renewal forms will have barcode sheets with them and do not need handling by Application Management. The scanning and indexing to “Renewal” category will initiate the alert for the Renewal work.

Always accept the mode chosen by N-FOCUS when registering renewal forms. For example, an AABD SSI recipient is only required to have a desk review annually. If N-FOCUS sets the case mode to Interviewing when a renewal application is received, it will be the SSW’s responsibility to change to the Processing mode when the Interview Needed work task is pulled.

Renewal forms are needed within 30 days. If not received by day 30, the program will need to be closed. However, if the renewal form is provided within 90 days of closure, a new application is not needed.

Renewal Title	N-FOCUS Program Case
Medicaid Renewal for Children, Families, Parent/Caretakers, Pregnant Women	• Desk Review for MAGI or Prepopulated form generated from N-FOCUS correspondence.
Medicaid Renewal for Aged and Disabled	• Prepopulated form, generated from N-FOCUS correspondence.
Medicaid Renewal for Combination Households	• Prepopulated form generated from N-FOCUS correspondence.

Steps for a MAGI Renewal:

1. Determine if a MAGI Desk Renewal can be processed.
2. An alert/WT will be generated by N-FOCUS when the MAGI desk review is due (Alert #512 Desk Review MAGI). Retrieve and accept the alert/WT.
3. As the permission to renew coverage in future years was previously approved by the client, you should not have to update the tax household or the tax permission box, unless there is a previous change reported that was not acted on.

   Reminder: Review Application Summary, Med Renewal Forms, and Document Imaging for applications that may have been submitted after the Tax Permission Signature Date currently listed and update the Tax Permission field if needed.

   Note: When the No. of Future Year(s) expires, the N-FOCUS system will prompt the worker to enter a new signature date and new number of future years.

4. Attempt to verify the client's attestation of current income (income that is currently used in the budget) with electronic data sources.
   a. Complete this step by reviewing VCI/TALX, SEW or other available electronic data sources.
      i. Do NOT utilize the IRS Hub call for MAGI renewals.
   b. If the current income is reasonably compatible with the electronic data sources and budgets can be ran, complete the renewal process.
      1. Start with VCI/TALX.
      2. If income has changed and you are able to verify it electronically (e.g. VCI/TALX or SEW confirms job end/start), continue with the desk review.
      3. If a desk review is completed, you will have to enter the renewal date.
   c. If the current income is not reasonably compatible with electronic data sources or you cannot complete the desk review for any other reason:
      i. Attempt 1 call out. Determine if the individual will agree to the provided by the data source or provides updated information to use as an attestation (e.g. pay raise, increase in hours, etc.).

         1. If you are able to contact the individual and confirm the income, go back up to step 4b.
         2. If the client reports a change to their tax filing status, a new tax household must be completed.
         3. If you are not able to contact the individual, proceed to step 3 of the MAGI Paper Renewal section.

5. Any open alerts or Work Tasks must be acted on and cleared at the time the renewal is completed or the case is closed.
6. After you run budgets, update Review/Recert Tracking in the N-FOCUS Expert system.
   a. This can be done from the budget authorization page.
   b. Remember, a renewal is required every 12 months.

7. Send a Notice of Action (NOA) to the client.
   a. If the client remains eligible, ensure the renewal language is on the NOA.
   b. If they are found ineligible and have indicated they have a medical need (MN/SOC), notify the client in the comment section the renewal is pending a medically needy determination.
      i. Evaluate if a Supplemental Form (MILTC-63) is needed. If so, mail one to the client.

8. Narrate and end the assignment once the renewal is complete.

MAGI Paper Renewal:

1. An alert/WT will be generated by N-FOCUS when a renewal form is sent out. If a renewal form was sent out, an alert/WT is created when the renewal form is returned. Retrieve and accept the alert/WT.

2. As the client has now signed a new tax permission on the renewal form, the Tax Permission window must be updated. The tax household will only need to be updated if the household reported a change in their tax filing status.

3. If a desk review cannot be completed and a renewal form has not yet been generated:
   a. Generate a Renewal Form:
      i. If at a local office, assign yourself to the program case as the primary worker and generate the Renewal Form.
      ii. If at the CSC, generate the Renewal Form, and put the case in Processing Mode.
   b. To generate the Renewal Form:
      i. Go to the Medicaid program case,
      ii. Select new correspondence,
      iii. Select the appropriate Renewal Form from the pick list.

   Note: The due date of the renewal form can be updated to allow enough time for the client to complete. Allow the client at least 30 days to complete the renewal form before their renewal is due (e.g. Renewal is due for benefits effective March 1, 2015, the renewal form due date should be no later than 30 days prior to March 1).

   c. Determine if there are electronic interfaces, information in Document Imaging, or information verified by EA available to be used as verification.
      i. If unable to verify information, send a Verification Request with the renewal form (e.g. NHM received and unable to verify electronically, through Document Imaging, or EA; SEW interface indicates a significant change in the income currently being budgeted and unable to verify electronically, through Document Imaging, or EA).
   d. Do Not:
      i. Update the renewal date to the next month as it will generate another desk review alert the following month.

4. Monitor the case for return of the Renewal Form.
   a. If the Renewal Form is Returned:
      i. The renewal received date will be automatically updated if the client returns the barcode sheet with the renewal form.

ii. Determine if the information provided can be verified electronically, if a phone call to the client, or an additional Verification Request is needed.
   1. If the information provided on the renewal form is not reasonably compatible with electronic data sources, attempt 1 call out.
      a. Determine if the individual will agree to the information provided by the data source or provides updated information to use as an attestation (e.g. pay raise, increase in hours, etc.).

iii. If verification is required, monitor alerts daily until eligibility can be determined per policy.
   1. If the required verification is provided, process the case.
      a. Do not use the Hub for verification of income.
      b. Start with VCI/TALX.
   2. If the required verification is not provided, close the case for reason of "Failed to Provide Information".

b. If the Renewal Form is Not Returned:

i. If a renewal form is not returned by the household, a "Renewal Not Received" alert will appear on the case.
   1. Review the case to determine if a MAGI Desk Renewal can be completed prior to closing.
      a. There have been instances where a renewal form was sent, not returned, but after further review of the case there is permission on file to renew for future years.
         i. If determined a MAGI Desk Renewal can be processed, proceed to the MAGI Desk Renewal section of the guide.
   2. If determined that a MAGI Desk Renewal cannot be processed and the household failed to return the renewal form, close the case for reason of "Case Review Not Completed".

5. Any alerts or Work Tasks open on the case must be acted on and cleared at the time the renewal is completed or the case is closed.

6. After you run budgets, update Review/Recert Tracking in the N-FOCUS Expert system.
   a. This can be done from the budget authorization page.
   b. Remember, a renewal is required every 12 months.

7. Send a Notice of Action (NOA) to the client.
   a. If the client remains eligible, ensure the renewal language is on the NOA.
   b. If they are found ineligible and have indicated they have a medical need (MN/SOC), notify the client in the comment section the renewal is pending a medically needy determination.
      i. Evaluate if a Supplemental Form (MILTC-63) is needed. If so, mail one to the client.

8. Narrate and end the assignment once the renewal is complete

Non MAGI Renewal (Non SSI):

1. Begin
   a. Retrieve and accept the work task "Renewal Received".

2. Check Renewal for Completeness
   a. Review N-FOCUS entries with information provided on current application. Example: Name, address, phone numbers, household comp, citizenship, reporting pregnancy, or dependent child.
      i. Information matches? Continue
      ii. Information doesn't match? Update N-FOCUS, then continue

3. Follow Verification Plan
   a. Attempt to contact client by phone for follow-up if areas on the application are left blank or clarification is needed.
   b. Send Verification Request Form (VR) to applicant on income and/or resources if necessary.
   c. If it appears that a member of the case may qualify for potential income, send a generic notice requiring the person to apply for the potential benefit within 60 days of the date of the notice. Set an alert for day 60.

4. Clear Alerts
   a. Process and clear any alerts on the case.

5. Review and Process Budget
   a. Review budget for correctness.
      i. If budget is correct: authorize budget and determine eligibility.
      ii. If budget is incorrect: make corrections as needed, authorize budget, and determine eligibility.
   b. If no longer income eligible, evaluate medical need according to policy (SOC). If eligible, process and authorize budget.

6. Notices
   a. Send notices to customer
      i. If a notice is generated for failure to provide, communicate missing information.

7. Narrate

8. Change Case Mode
   a. Check mode to see if case in in correct mode.
      i. Process mode if medically needy or denied for failure to provide.
      ii. Change management if approved or denied for other reason.
   b. Review renewal dates.

Non-MAGI Renewal SSI:

1. Begin
    a. Retrieve and accept the alerts exist work task “Desk Review”.

2. Check Interfaces
    a. Check interfaces for current pay and current address.
    b. If there are no changes, update the review date.
    c. If there are changes, send a Speednote to inform the customer their old address is still on file with Social Security, and they should update their address to avoid any future interruption in Social Security benefits.

3. Review and Process Budget
    a. Review budget for correctness
    b. If budget is correct: authorize budget and determine eligibility.
    c. If budget is incorrect: make corrections as needed, authorize budget, and determine eligibility.
    d. If no longer income eligible, evaluate medical need according to policy (SOC).
        i. If there is a medical need determine if there is a current application on file (within the past 12 months).
            1. If yes, request verification of income and resources.
            2. If no, notify the individual that a new application and redetermination of eligibility is needed within 30 days

4. Notices
    a. Send notices to customer
    b. If a notice is generated for failure to provide, communicate missing information.

5. Narrate