Insurance Affordability Cleanup

What is Insurance Affordability Cleanup?

You will need to complete cleanup of the Insurance Affordability (IA) pages to ensure that all the case information is up-to-date and accurate. Make sure to complete person page cleanup for each person page on a case before completing IA cleanup. This will allow new evidence to transfer from the Product Delivery Case (PDC) to the IA in the Incoming Evidence tab.

Make sure to look at all evidence that is entered on the IA even if you are not editing the evidence; this will help you catch any issues before keying your recertification, transfer, or help ticket.

> **Tips**: Here are some tips to successfully complete IA cleanup:
>
> 1. Always check incoming evidence to make sure nothing has been carried over from another case.
> 2. Do not add start dates before a client's date of birth.
> 3. If a household member moves out and later moves back into the home, they should always be end dated and then new evidence added for the date they moved back in. This means there could be a gap for that household member, which is ok.

Incoming Evidence

1. Open the IA. Click the **Evidence** tab.
2. Check for incoming evidence by clicking **Incoming Evidence** in the left-hand menu.
3. If the incoming evidence is a change you made, you can toggle in, and press *Ignore*.
4. If the incoming evidence is not a change you made, review the change.

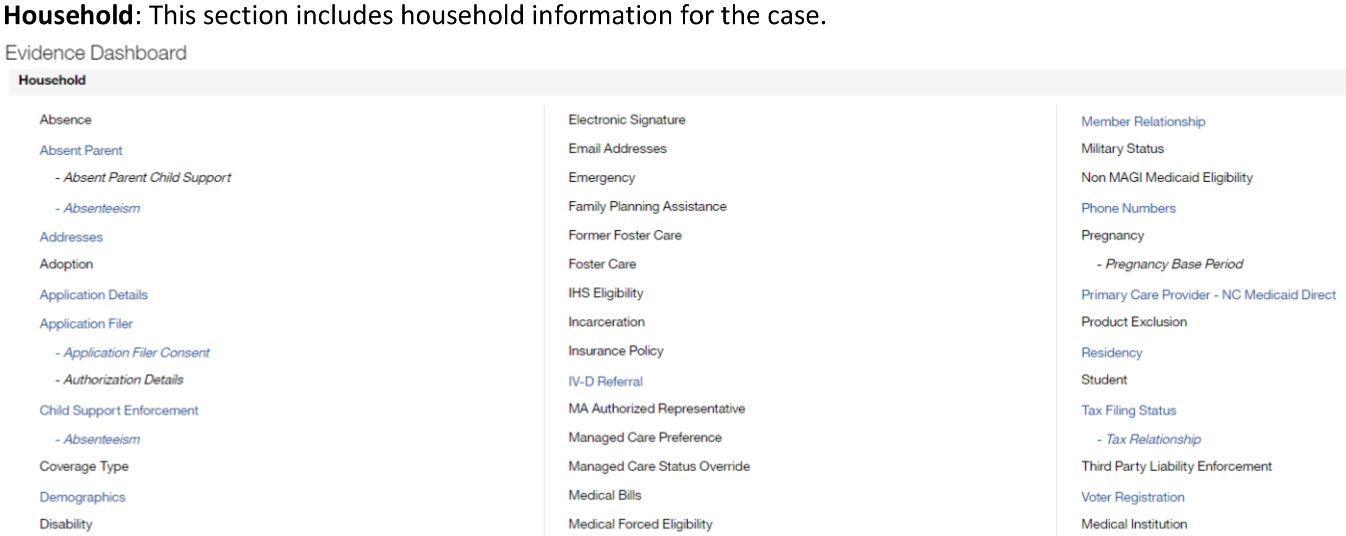
> **Note**: If you are completing IA cleanup for another caseworker, let the caseworker know there is incoming evidence to review.

Dashboard

1. Open the IA. Click the **Evidence** tab.
2. Click the **Dashboard** in the left-hand menu.
3. Complete each section of the evidence dashboard. Keep in mind that this is not the entire list of evidence that you may encounter.

> **Important**: If you are completing IA cleanup for another caseworker, edit information as needed from the list below, except for *Income*. If there are errors or missing information, you can let the caseworker know. You should only edit *Income* when you have your own cases.

i. **Household**: This section includes household information for the case.



a) *Addresses*: Check that all active household members have an active private address, and they match. (Toggle twice into each address as sometimes the name will not match once you toggle in.)
   - Make sure that if the household has moved that dates match for each household member.
   - Delete all mailing addresses and replace them with a private address for the same time frame if needed.
   - Don't forget that anytime you update a person page, it will usually update the IA and place addresses in edit.

b) *Application Details*: Make sure all active household members have application details.
   - Always end date and add new details for household members if they go from receiving to not receiving or vice versa. (Do not uncheck or check the applicant box on current details).

c) *Application Filer*: This should show who filed the application.

d) *Application Filer Consent*: Make sure all boxes are checked in the consent evidence or it will not pull OVS fully. Toggle in and press the list action menu to check.

e) *Demographics*: Make sure all household members have demographic information included. The date shown under *Period* does not have to be the client's date of birth.

f) *Member Relationships*: Make sure all household members have corresponding relationships that match every household member.
   - Check to make sure there are not duplicate relationships as this could cause an issue in determinations. For example, John is the parent of Amy, and Amy is the child of John.

   > **Example**: To determine the correct number of relationships, start with the total number in the household and subtract 1. Then add up the remaining number of household members in descending order. For example, if there are 4 members in the household>3+2+1=6 relationships.

   - Keep in mind that relationships that are end dated count toward the total number of relationships.

g) *Phone Numbers*: Check that there are no mobile phone numbers included on the page. If so, replace them with personal numbers.

h) *Primary Care Provider – NC Medicaid Direct:* If applicable, make sure all household members receiving on a case have primary care evidence.

i) *Residency*: Make sure all household members who are receiving benefits on the case have residency evidence entered.
   - Toggle in and select the list action menu, then press **Edit** to check that the top two boxes in evidence are checked.
   - Do not end date residency for a household member unless they have moved out of state.

j) *Tax Filing Status*: All active household members should have a tax filing status of Tax Filer, Non Filer, [1]or Tax Dependent. To make changes to the tax filing status for a household member, toggle in and press **Edit**.
   - If members are married and filing jointly, make sure to check the *Married Filing Jointly* checkbox.
   - If a household member is a tax dependent of someone outside of the household, check the *Dependent on Filer External to the Household* checkbox.

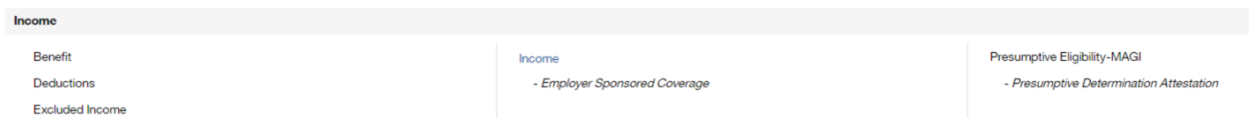
[1] Note that the hyphen is excluded from this section to accurately reflect the actual spelling in NC FAST.

- If a household members tax filing status changes, end date the outdated evidence and add in the new tax filing status. Do not use effective date of change or change the outdated evidence.

k) *Tax Relationship*: Make sure to add tax relationships if the household member is being claimed by someone else in the household.
   - Remember to change the tax relationships if the tax filing status changes for a household member.

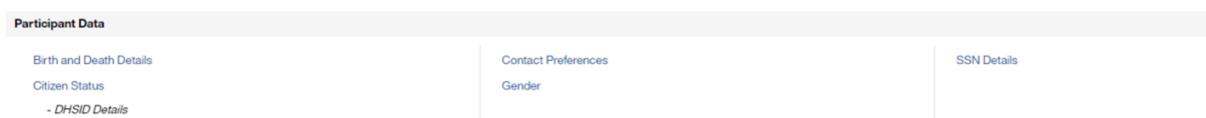
> **Example**: For example, last year Mom and dad were not married and filed separately, but the children were claimed by mom. This year, they are married and are now filing jointly while claiming both children. You will need to change the tax relationships for the children to reflect this change.

ii. **Income**: This section includes information about income included on the case.



a) *Income*: Make sure all income is correctly entered with an income calculation.
   - Enter any income in the home, even if it will not be countable towards the household.
   - If the system entered income, check to make sure the income is accurate.
   - Only use effective date of change if the client is working for the same employer. If income is from a new employer, end date the outdated income and enter evidence for the new job.

iii. **Participant Data**: This section includes information about the participants on the case.



a) *Birth and Death Details*: Make sure all household members have birth (and death if applicable) details.
   - Make sure there are not duplicates.

b) *Citizen Status*: Make sure all household members who are receiving on a case have citizen status evidence entered.
   - DHSID details may be entered if the client is not a US Citizen.
   - Dates should only match date of birth for children that are US citizens if they are receiving benefits.

c) *Contact Preferences*: Make sure all active household members have contact preferences (Spoken, Written, and Communication) included. Toggle in twice to check.
   - Make sure the preferences match the Person Page.

d) *Gender*: Make sure all active household members have gender evidence.
   - Check to make sure there is not duplicate evidence.

e) *SSN Details:* Make sure all household members that have a SSN are included.
   - Auto newborns will be entered but marked as *SSN Status-Applied for SSN* and *No SSN Reason-Auto newborn*. This will be updated at the one-year review.
   - Dates for children should match their date of birth.

4. When you have reviewed all evidence, press the page action menu in the right corner. Then press **Apply Changes**. Check that the changes showing are the changes you want applied. If they are, press **Save**. If not, select only the changes you want to apply.
5. You've now successfully completed IA cleanup.