

Medical Assistance Closure Checklist

CASE RECORD # _____

CASEWORKER MUST ANSWER AND INITIAL EACH QUESTION

1. WHAT TYPE OF REVIEW WAS THIS? <input type="checkbox"/> SAR <input type="checkbox"/> RENEWAL <input type="checkbox"/> OTHER	INITIALS _____
2. WAS NOTIFICATION GIVEN TO THE CLIENT AS TO WHAT DOCUMENTS WERE REQUIRED TO BE PROVIDED? <input type="checkbox"/> YES <input type="checkbox"/> NO	INITIALS _____
3. WAS THE IMAGING REPOSITORY, THE RECEPTION/MAILROOM/DESK AREA CHECKED FOR FORMS AND VERIFICATION DOCUMENTS? <input type="checkbox"/> YES <input type="checkbox"/> NO	INITIALS _____
4. WERE IEVS DATA EXCHANGES AND OTHER DATA SOURCES CHECKED? <input type="checkbox"/> YES <input type="checkbox"/> NO	INITIALS _____
5. DID THE CLIENT CONTACT THE CAO AND REQUEST ADDITIONAL TIME TO PROVIDE FORMS AND VERIFICATION? <input type="checkbox"/> YES <input type="checkbox"/> NO	INITIALS _____
6. WAS THE CASE REVIEWED FOR A PREGNANT WOMAN OR CHILD UNDER THE AGE OF ONE? <input type="checkbox"/> YES <input type="checkbox"/> NO	INITIALS _____
7. REASON CODE 042 TO BE USED TO CLOSE MA BUDGET? <input type="checkbox"/> YES <input type="checkbox"/> NO	INITIALS _____
SUBMITTED BY: _____ <small style="text-align: center;">CASEWORKER SIGNATURE</small>	DATE: _____

FOR SUPERVISOR USE ONLY	
SUPERVISOR MUST CHECK ONE:	
CASE IS CORRECT AND MA BUDGET CAN BE CLOSED USING REASON CODE 042. CASEWORKER ACTIONS:	<input type="checkbox"/>
<ul style="list-style-type: none"> CLOSE MA BUDGET USING REASON CODE 042 AND SEND AN ADVANCE NOTICE. ENTER A CASE COMMENT STATING ALL ACTIONS TAKEN ON THE CASE TO DOCUMENT THE MA CLOSING USING REASON CODE 042. 	
CASE IS INCORRECT AND MA BUDGET CANNOT BE CLOSED USING REASON CODE 042 OR 047 (circle one).	<input type="checkbox"/>
<ul style="list-style-type: none"> CASEWORKER MUST CORRECT THE CASE AND RETURN TO SUPERVISOR FOR SIGN OFF. SUPERVISOR MUST PROVIDE COMMENTS ON ALL INCORRECT CASES AND WHAT ACTIONS WERE TAKEN BY THE CASEWORKER. 	
SUPERVISOR COMMENTS: _____ _____ _____ _____	
REVIEWING SUPERVISOR: _____	DATE: _____
*SUPERVISORS SHOULD NOT SIGN UNTIL CASE IS CORRECT	