Medical Assistance Closure Checklist

CASE RECORD # _____

CASEWORKER MUST ANSWER AND INITIAL EACH QUESTION

1. WHAT TYPE OF REVIEW WAS THIS? ☐ SAR ☐ RENEWAL ☐ OTHER	INITIALS_____
2. WAS NOTIFICATION GIVEN TO THE CLIENT AS TO WHAT DOCUMENTS WERE REQUIRED TO BE PROVIDED? ☐ YES ☐ NO	INITIALS_____
3. WAS THE IMAGING REPOSITORY, THE RECEPTION/MAILROOM/DESK AREA CHECKED FOR FORMS AND VERIFICATION DOCUMENTS? ☐ YES ☐ NO	INITIALS_____
4. WERE IEVS DATA EXCHANGES AND OTHER DATA SOURCES CHECKED? ☐ YES ☐ NO	INITIALS_____
5. DID THE CLIENT CONTACT THE CAO AND REQUEST ADDITIONAL TIME TO PROVIDE FORMS AND VERIFICATION? ☐ YES ☐ NO	INITIALS_____
6. WAS THE CASE REVIEWED FOR A PREGNANT WOMAN OR CHILD UNDER THE AGE OF FOUR? ☐ YES ☐ NO	INITIALS_____
7. REASON CODE 042 TO BE USED TO CLOSE MA BUDGET? ☐ YES ☐ NO	INITIALS_____

SUBMITTED BY: _____   DATE: _____
CASEWORKER SIGNATURE

FOR SUPERVISOR USE ONLY
SUPERVISOR MUST CHECK ONE:
CASE IS CORRECT AND MA BUDGET CAN BE CLOSED USING REASON CODE 042. CASEWORKER ACTIONS: • 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 0R 047 (circle one). ☐ • 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