



Medical Assistance Closure Checklist

CASE RECORD #

CASEWORKER MUST ANSWER AND INITIAL EACH QUESTION:

INITIALS

1. What type of review was this?	<input type="checkbox"/> SAR	<input type="checkbox"/> RENEWAL	<input type="checkbox"/> OTHER	
2. Was notification given to the client as to what documents were required to be provided?	<input type="checkbox"/> YES	<input type="checkbox"/> NO		
3. Was the imaging repository, the reception/mail room/desk area checked for forms and verification documents?	<input type="checkbox"/> YES	<input type="checkbox"/> NO		
4. Were IEVS data exchanges and other data sources checked?	<input type="checkbox"/> YES	<input type="checkbox"/> NO		
5. Did the client contact the county assistance office and request additional time to provide forms and verification?	<input type="checkbox"/> YES	<input type="checkbox"/> NO		
6. Was the case reviewed for a pregnant woman or child under the age of four?	<input type="checkbox"/> YES	<input type="checkbox"/> NO		
7. Reason Code 042 to be used to close MA budget?	<input type="checkbox"/> YES	<input type="checkbox"/> NO		
SUBMITTED BY:				
<div>CASEWORKER SIGNATURE</div> <div>DATE</div>				

FOR SUPERVISOR USE ONLY:

SUPERVISOR MUST CHECK ONE:

<input type="checkbox"/> CASE IS CORRECT AND MA BUDGET CAN BE CLOSED USING REASON CODE 042. Caseworker Actions: <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.
<input type="checkbox"/> CASE IS INCORRECT AND MA BUDGET CANNOT BE CLOSED USING REASON CODE 042 OR 047 (CIRCLE ONE). <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.**