

Tailored Care Manager Alignment of 1915(i) Eligibility and Care Plan/ISP to the Birth Month

Collaboration



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

This training was developed collaboratively by the Tailored Plans and DHB to ensure consistent, standardized 1915 (i) instruction across the state. This session will be recorded and posted on the TCM webpage and in the NC AHEC TCM portal.



Intended Audience:

- Care Managers
- Care Manager Supervisors
- Extenders

Abbreviations & Definitions

(Commonly used abbreviations
and definitions)

- ISP – Individual Support Plan
- HCBS- Home and Community Based Services
- TOC- Transition of Care
- CMA – Care Management Agency
- PLE – Provider Lead Entity
- IA – Independent Assessment
- CM- Care Manager
- AMH+- Advanced Medical Home Plus
- PCP- Primary Care Physician
- Gap Plan- A short term Care Plan/ISP and eligibility period used to transition to the member's birth month schedule

Agenda:

Background on
aligning plan with
Birth Month

1915(i) Timelines

Scenario
Assumptions

Alignment
Scenarios

Birth Month
Calculator Demo

Reminders and
Updates

Spring 2026

1915(i) Birth Month Alignment Update

- To ensure that Members experience minimal disruption in receipt of 1915(i) services, the Department is electing to move both the 1915(i) Eligibility Timelines and the Care Plan/ISP to a Birth Month Alignment.

Benefits of a Birth Month Alignment



Care Managers, Carelon, Tailored Plans and Providers will be aware of the timeline.



Standardization across the state should decrease lapses of eligibility and authorizations.



This will ensure predictability for eligibility timelines and annual reassessments.



Streamline Health Plan Transitions of Care (TOC). Plans will know when plans and assessment are expected to expire.



Streamline CMA transitions so Care Managers are aware of expiration dates.

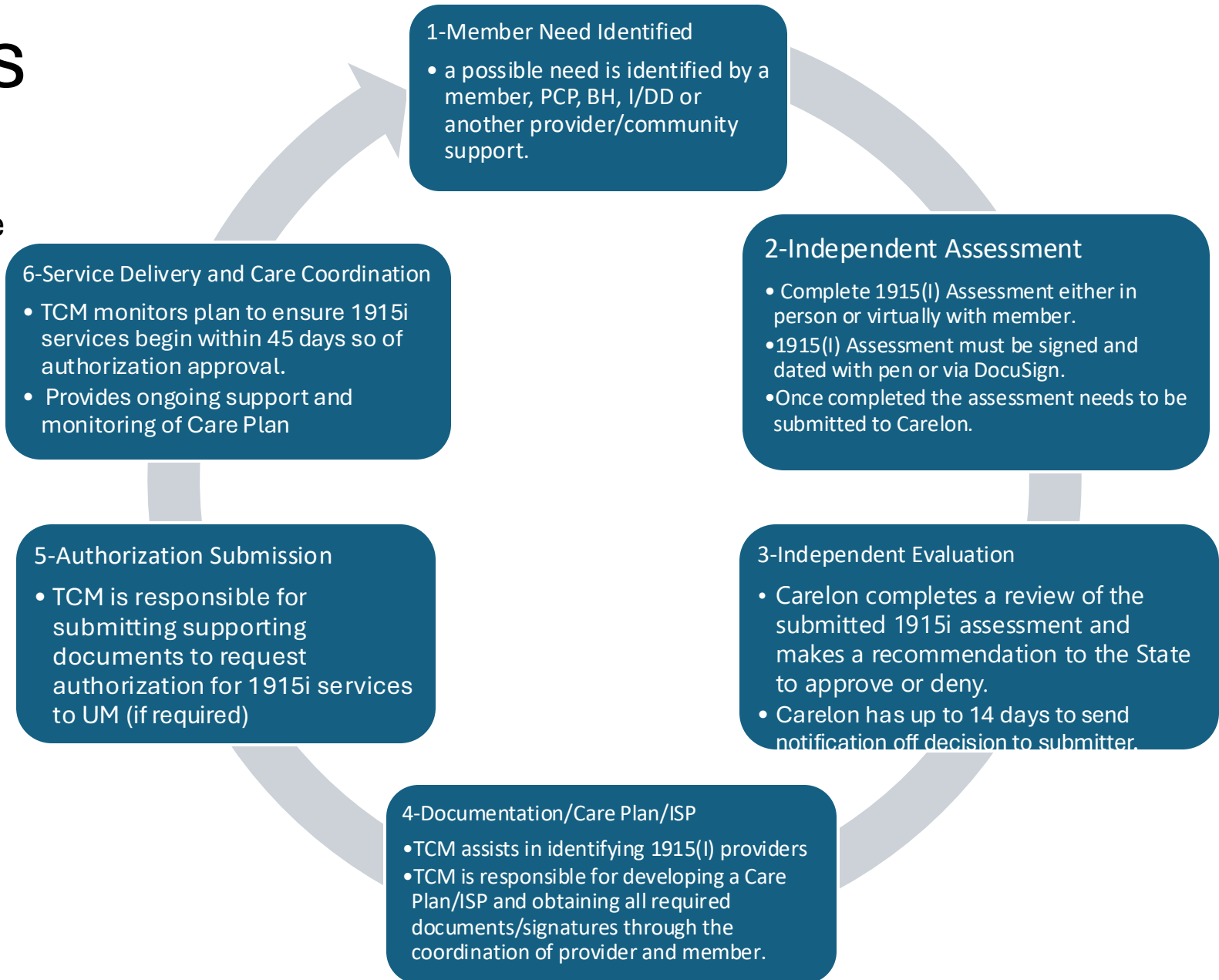


Increase consistency of expectations throughout the NC Medicaid system.

1915(i) Process

REMINDERS:

- The 1915(i) assessment must be approved by the State prior to requesting authorization of any the 1915(i) service.
- Signatures must be obtained prior to the plan effective date.
- Steps 4 and 5 need to be completed within 45 days of the Independent Evaluation approval date.
- For service authorization, follow the UM requirements of the individual's assigned Health Plan.
- Copies of all documents must be provided to team members including PCP within 14 days of plan approval



Scenario Assumptions

- For the annual reassessment for 1915(i) services, it is best practice to complete 2 month or 60 days before 1915(i) eligibility expires and no later than 45 days prior to expiration to ensure no gaps in services.
- 1915(i) eligibility is effective for up to 12 months.
- Once on birth month cycle, 1915(i) eligibility start date is the same as the Care Plan/ISP Start date.
- 1915(i) eligibility end date is the same as the Care Plan/ISP end date.
- The effective date of the **annual** plan is always the first of the month following the birth month.
- Care Plans/ISPs do not extend beyond 365 calendar days (366 days in Leap Years).
- A UM review is required for all 1915(i) services except for IPS-SE, this is completed and submitted no less than 14 days prior to the first of the month following the birth month.
- Initially the first plan year will be an abbreviated plan year. All following plans will align with the birth month.

Carelon

Carelon is committed to supporting the North Carolina system-wide shift to the 1915(i)-birth month cycle

As reflected on the new 1915(i) assessment, Carelon will end the initial 1915(i) eligibility on the last day of the birth month.

This initial 1915(i) eligibility will likely be granted for less than one year, to start the birth month alignment immediately.

Since initial 1915(i) eligibility will end on the last day of the birth month, the next 1915(i) eligibility cycle will start on the first of the month after the birth month and continue annually thereafter.

Carelon reviews 1915(i) assessments and sends eligibility notifications to the submitter within 14 calendar days.

Carelon also understands and will be prepared to accept 1915(i) reassessments that occur in quick succession to fill the gap between the initial 1915(i) eligibility and the birth month alignment. This will be reflected on the new 1915(i) assessment once published.

New NC Medicaid 1915(i) Assessment Tool

Assessment is sent to Carelon according to your Health Plan process (some submit directly to Carelon and others submit through the Health Plan).

Assessor Information			
Care Manager (CM) or Care Coordinator (CC) Name:			
CM / CC Agency Name:			
Type of Assessment Being Submitted / Eligibility Dates Being Requested			
Type of Assessment	Definition of Type	Requested Start Date	Requested End Date
Initial Assessment	Complete this row for beneficiary entering 1915(i) service(s) for the first time or who are returning to 1915(i) service(s).	N/A	N/A
Transitional ("gap") Assessment	Completed this row to transition eligibility to a birth month annual assessment schedule. Requested start date will be the day after the existing eligibility end date and the requested end date will be the last day of the beneficiary's birth month.		
Annual Reassessment	Complete this row for beneficiary on the annual birth month assessment schedule. The requested Start Date will be the 1 st day of the month following the beneficiary's birth month. The requested End Date will be the last day of the beneficiary's birth month the following year. Maximum 1 year		
Reassessment	Complete this row for a beneficiary who has a change in level of functioning.		



Questions ?

Current state

Birth month
transitions

Full annual birth
month alignment

The next few slides will help address how we are moving to the birth month schedule.

Initial process to align current eligibility and care plan/ISPs with the birth month.

This will also address Initial requests for 1915(i) services and the process.

Within one year all plans and 1915(i) eligibility will end on the last day of the birth month.

"Gap" Care Plan/ISP

Scenario:

When a member's 1915(i) eligibility expires **before** the member's next birth month

Member's 1915(i) Eligibility Expires before member's next birth month

Gap Care Plan/ISP

		1915(i) Eligibility	Initial 1915(i) Care Plan/ISP			1915(i) Assessment	Carelon Reassessment Decision	Pre-Planning Work Starts	ISP/Care Plan Creation	1915(i) Eligibility Effective Date	Gap Plan End Date	1915(i) Eligibility End Date
Birth Month	Member DOB	Date 1915(i) Eligibility Expires	Initial 1915(i) Care Plan/ISP Effective Date	Initial 1915(i) Care Plan/ISP End Date	Effective Date of Next Plan	Target Submission Date for 1915(i) Reassessment (Gap Plan)	14 Day Decision Window for Carelon	CMCA, Gathering Documents (ROI), Setting Planning Meeting Date	Day Count for Planning Meeting(s), CMCA, Plan Creation, Signatures	Next 1915(i) Eligibility Start Date	End Date for Gap ISP/Plan	End Date for 1915(i) Gap Eligibility
April	4/3/99	2/13/27	3/1/26	2/28/27	3/1/27	12/30/26	1/13/27	12/30/26	45	2/14/27	4/30/27	4/30/27
January	1/10/57	10/4/26	12/4/25	12/3/26	12/4/26	8/20/26	9/3/26	8/20/26	45	10/5/26	1/31/27	1/31/27
July	7/16/88	5/23/26	6/1/25	5/30/26	5/31/26	4/8/26	4/22/26	4/8/26	45	5/24/26	7/31/26	7/31/26
August	8/2/87	7/3/26	6/14/25	6/13/26	6/14/26	5/19/26	6/2/26	5/19/26	45	7/4/26	8/31/26	8/31/26

Aligning with full birth month schedule

First Birth Month Cycle Care Plan/ISP													
		1915(i) Eligibility	Care Plan/ISP			1915(i) Assessment	Carelon Reassessment Decision	Pre-Planning Work Starts	Care Plan/ISP Creation	Care Plan/ISP Effective Date	1915(i) Eligibility Effective Date	Care Plan/ISP Plan End Date	1915(i) Eligibility End Date
Birth Month	DOB	Date 1915(i) Eligibility Expires	Annual Care Plan/ISP Effective Date	Annual Care Plan/ISP End Date	Target Completion Date for Birth Month Alignment 1915(i) Reassessment	Target Submission Date for 1915(i) Reassessment (Birth Month Alignment)	14 Day Decision Window for Carelon	CMCA, Gathering Documents (ROI), Setting Planning Meeting Date	Day Count for Planning Meeting(s), CMCA, Plan Creation, Signatures	First Birth Month Cycle ISP/Care Plan Start Date	1915(i) Eligibility Start Date	First Birth Month Cycle End Date for ISP/Plan	End Date for 1915(i) Eligibility
April	4/3/99	4/30/27	5/1/27	4/30/28	3/1/27	3/16/27	3/30/27	3/16/27	45	5/1/27	5/1/27	4/30/28	4/30/28
January	1/10/57	1/31/27	2/1/27	1/31/28	12/2/26	12/17/26	12/31/26	12/17/26	45	2/1/27	2/1/27	1/31/28	1/31/28
July	7/16/88	7/31/26	8/1/26	7/31/27	6/1/26	6/16/26	6/30/26	6/16/26	45	8/1/26	8/1/26	7/31/27	7/31/27
August	8/2/87	8/31/26	9/1/26	8/31/27	7/2/26	7/17/26	7/31/26	7/17/26	45	9/1/26	9/1/26	8/31/27	8/31/27

Spring 2026

"Gap" Care Plan/ISP

Scenario:

When a member's 1915(i) eligibility expires **after** the member's next birth month

Member's 1915(i) Eligibility Expires after member's next birth month.

Gap Care Plan/ISP													
		1915(i) Eligibility	Initial 1915(i) Care Plan/ISP			1915(i) Assessment	Carelon Reassessment Decision	Pre-Planning Work Starts	ISP/Care Plan Creation	Gap Plan Effective Date	1915(i) Transitional Eligibility Effective Date (Gap)	1915(i) Transitional Eligibility and Gap Plan End Date	1915(i) Eligibility End Date
Birth Month	Member DOB	Date 1915(i) Eligibility Expires	Initial 1915(i) Care Plan/ISP Effective Date	Initial 1915(i) Care Plan/ISP End Date	Effective Date of Next Plan	Target Submission Date for 1915(i) Reassessment (Gap Plan)	14 Day Decision Window for Carelon	CMCA, Gathering Documents (ROI), Setting Planning Meeting Date	Day Count for Planning Meeting(s), CMCA, Plan Creation, Signatures	Gap ISP/Care Plan Start Date	1915(i) Eligibility Start Date for Gap	End Date for Gap Care Plan/ISP	End Date for 1915(i) Eligibility
April	4/3/99	7/13/26	7/30/25	7/13/26	7/14/26	5/29/26	6/12/26	5/29/26	45	7/14/26	7/14/26	4/30/27	4/30/27
September	9/15/06	11/30/26	12/2/25	11/30/26	12/1/26	10/16/26	10/30/26	10/16/26	45	12/1/26	12/1/26	9/30/27	9/30/27
November	11/7/78	2/8/27	5/16/25	5/15/26	5/16/26	12/25/26	1/8/27	12/25/26	45	5/16/26	5/16/26	11/30/26	11/30/26

Member's 1915(i) Eligibility Expires after member's next birth month. First Birth Month Cycle

First Birth Month Cycle Care Plan/ISP

First Birth Month Cycle Care Plan/ISP											
		1915(i) Eligibility	Plan Care Plan/ISP		1915(i) Assessment	Carelon Reassessment Decision	Pre-Planning Work Starts	Plan Effective Date	1915(i) Eligibility Effective Date	Care Plan/ISP End Date	1915(i) Eligibility End Date
Birth Month	Member DOB	Date 1915(i) Gap Eligibility Expires	Gap Care Plan/ISP Effective Date	Gap Care Plan/ISP End Date	Target Submission Date for Birth Month 1915(i) Reassessment	14 Day Decision Window for Carelon	CMCA, Gathering Documents (ROI), Setting Planning Meeting Date	First Birth Month Cycle ISP/Care Plan Start Date	1915(i) Birth Month Eligibility Start Date	First Birth Month Cycle End Date for ISP/Plan	End Date for 1915(i) Eligibility
April	4/3/99	4/30/27	7/14/26	4/30/27	3/16/27	3/30/27	3/16/27	5/1/27	5/1/27	4/30/28	4/30/28
September	9/15/06	9/30/27	12/1/26	9/30/27	8/16/27	8/30/27	8/16/27	10/1/27	10/1/27	9/30/28	9/30/28
November	11/7/78	11/30/26	5/16/26	11/30/26	10/16/26	10/30/26	10/16/26	12/1/26	12/1/26	11/30/27	11/30/27

1915(i) Birth Month Alignment Calculator Demo

This tool was developed collaboratively by the Tailored Plans and DHB to assist care management staff to calculate the key dates in order to align the 1915(i) eligibility and Care Plan/ISPs to the birth month.

- Fill in the **yellow shaded boxes** and the tool will do the rest!
- **Please send us feedback on your experience with the tool.**



Questions ?

Spring 2026

NC Medicaid 1915(i) Assessment

- DHB will begin offering training on the updated NC Medicaid 1915(i) Assessment Tool
 - Planned for June. Dates to be confirmed shortly and invitations shared.

Launch and Timeline

- **Medicaid 1915(i) Assessment:** Effective date for use of new assessment tool: July 1, 2026
- **Birth month alignment planning:** Starts with September birthdates (gives 60-day lead time)



Current Birth Month Process

Some care managers began completing assessments during the birth month based on previous guidance.
No changes to this Practice

Official Start:
September Birth Month Cycle

Spring 2026

Summer 2026
Birth Month Cycle
Voluntary Implementation

1915(i) Office Hours and Questions

DHB and the Tailored Plans will host **30-minute office hour** sessions to help answer your questions about the 1915(i) birth-month alignment.

June Office Hours

- June 15, 2026 10:00 - 10:30
- June 29, 2026 10:00 - 10:30

July Office Hours

- July 13, 2026 10:00 - 10:30
- July 27, 2026 10:00 - 10:30

August Office Hours

- August 10, 2026 10:00 - 10:30
- August 24, 2026 10:00 - 10:30

DHB has also established a dedicated email address for the submission of your 1915(i) questions.




DHHS-Medicaid.1915iSupport@dhhs.nc.gov

Demo of Birth month Calculation Tool

- Demos for the Birth Month Calculation tool will be shared during the June 1915(i) Office Hours.

- June 15, 2026 10:00 - 10:30
- June 29, 2026 10:00 - 10:30

NC Medicaid 1915(i) Resources

1915(i) Resource	Link
1915(i) Training Recording and Presentation Decks	Information for Tailored Care Management Providers NC Medicaid
1915(i) Material	
1915(i) Training	
1915(i) Q & A	
1915(i) Additional Resources	
1915(i) Service Definitions	Program Specific Clinical Coverage Policies NC Medicaid
DHB 1915(i) Support Email	DHHS-Medicaid.1915iSupport@dhhs.nc.gov

Questions ?

[DHHS-
Medicaid.1915iSupport@dhhs.nc.gov.](mailto:DHHS-Medicaid.1915iSupport@dhhs.nc.gov)

Spring 2026