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**Utah Ryan White Part B Program**  
**ClientTrack**  
**Eligibility Specialist User Guide**



UTAH DEPARTMENT OF  
**HEALTH**

**Division of Disease Control & Prevention**  
**Bureau of Epidemiology**  
**Ryan White Part B Program**

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## 1. ABOUT THIS USER GUIDE

The purpose of this document is to provide **Eligibility Specialists** the information they need to complete and submit Applications, Re-Certifications, and Self-Attestations for their clients.

For the purpose of this manual the term “application” will be used in general terms referring to New Application (for new Utah Ryan White applicant), Re-Certification (a full redetermination of eligibility), and Self-Attestation (a partial redetermination where client attests to no changes in their situation since the last application), unless otherwise noted.

The term “Program” will be used referring to the Utah Ryan White Part B Program.

## 2. ACCESSING CLIENTTRACK

ClientTrack is a web-based application. There are two types of ClientTrack environments: Training and Production (Live). Each environment has its own unique web address.

### I. SIGN-IN

1. Navigate to the ClientTrack website:
  - a. Training database [https://www.clienttrack.net/UT\\_RW\\_Train](https://www.clienttrack.net/UT_RW_Train)
  - b. Live production database [https://www.clienttrack.net/UT\\_RW\\_PROD](https://www.clienttrack.net/UT_RW_PROD)
2. Sign in to ClientTrack with your username and password. Your username is your email address.
  - a. If you have access to more than one Workgroup, Organization, and/or Location, check to make sure you are using the correct settings determined by your intentions. Update as needed. You can also change these settings once you are logged in.
  - b. Click “Use these settings”.

### II. WORKSPACE

ClientTrack navigation is based on different Workspaces. A Workspace is a collection of features and components which are grouped together in the ClientTrack user interface. To navigate from one Workspace to another, click on the Workspace Carousel.

#### A. Workspace Carousel

*The different workspaces you have access to will show on this screen. Click on the workspace you need to work from.*



## B. Home Workspace

*Your Home Workspace is your home base as a user. Here you view information specific to you as a user.*

1. **User Dashboard:** The user dashboard displays specific information related to your workgroup and current Program enrollment.
2. **Enrollment List:** A list of all clients who are enrolled in the Program.
3. **Application List:** A list of all clients with pending applications.
4. **My ClientTrack:** The menu options for your workgroup:
  - a. **Active Case Load:** A list of all clients who are assigned to your case load.
  - b. **Paused Workflows:** A list of clients who you have started a workflow, but did not complete or end the workflow.
  - c. **Referrals to Program Services:** A list of clients who have been referred to services, including referral date, service group, referral services, provider, status and result.
  - d. **My Submitted issues:** A workspace with the list of issues (problems, questions, or suggestions) you have submitted, and the status of each.
  - e. **My User Configuration:**
    - i. **My Information:** Your User Name, Contact Information, and Visual Theme selection.
    - ii. **My Team:** A list of users with you as their assigned supervisor, and actions you can perform.
    - iii. **My Document Check > Paused Operations:**
      - **Paused Forms:** A list of forms you've paused.
      - **Paused Workflows:** A list of all clients whom you have started a workflow and currently pending action.
    - iv. **Change My Password:** Password requirements and change options.
    - v. **Recovery Information:** If you forget your password, information on account recovery.
    - vi. **Bulletin Board:** A place for shared messages with other ClientTrack users. These messages are viewable by all ClientTrack users that can access the Bulletin Board.
5. **ClientTrack Information:** Menu options for ClientTrack information.
  - a. **Global News:** News items for all ClientTrack users to be aware of.
  - b. **ClientTrack Training Videos:** Videos to watch to learn more about ClientTrack functionality.
  - c. **Feature Documentation:** Access and view ClientTrack's feature documentation.
  - d. **ClientTrack IDEA:** Explore data and complete query reports

## C. Clients Workspace

*This workspace provides you with the access to information specific to a selected client. The Menu Panel on the left depends on your Workgroup you are currently logged in as. Your menu will include some of the following options:*

1. **Client Dashboard:** Summary of client's information, demographics, Program enrollment and services.
2. **Find Client:** Search for client by multiple options. A list of clients that match search criteria will populate. Click anywhere on the client's line and you will be navigated to that client's dashboard.
3. **New Ryan White Application:** Start of new application for new clients, or start a recertification for clients who have had a lapse in coverage.
  - a. **Add a new client:** Start a new application for a client who has not been on the Utah Ryan White Part B Program in the past.
  - b. **Use the current client:** Start a new recertification for a client who has had a lapse in coverage.
  - c. **Select another client:** Returns to *Find Client* screen to search and select another client.
4. **Client Information Menu:** Menu options to view details, make changes, and update specific information about the client.
  - a. **Client Information:** Client's history of Mailing Address, Email, Phone Number, Household Size, and Marital Status.
  - b. **Edit Client Information:**
    - i. **Address History:** Client's address history and option to update.
    - ii. **Alias History:** Client's aliases and option to add new alias.
    - iii. **Document Check:** A list of documents that have been uploaded to the client's file for a quick check to find out what documents may still be needed.
    - iv. **Files:** Documents or other files are stored electronically by uploading them here.
    - v. **All Client Files:** A collection of all client's documents and files that have been uploaded.
    - vi. **Interested Others:** A list of other household members and names client listed on the Authorization for Release of Information.
    - vii. **Notifications:** A page for notifications and alerts to set up and display.
    - viii. **Paused Workflows:** A list of any paused workflows for the client, if any. Actions can Resume, Restart, or Delete Paused Workflow by clicking the action button.
    - ix. **Recently Accessed:** A history of who accessed the client's file and date of accessed.
  - c. **Authorization for Release of Information:** Display the client's history of Authorization of Release of Information forms.
  - d. **Case Notes:** Client's case notes history and where you add new case notes.
  - e. **Eligibility History:** Client's history of eligibility for the whole Program. For each eligibility period, action button allows to review the eligibility, which takes you to the Eligibility Summary page. [See section 8.I. for more detail.](#)

- i. **CAREWare Eligibility History** button on the upper right of the Eligibility History page will take you to the Migration Eligibility Dates for the eligibility history from CAREWare.
- f. **Eligibility Proof of Income:** Client's history of Eligibility Specialist's income calculation and the client's FPL (i.e. Under 250%, 250% - 500%, or Over 500%). View icon navigates user to the calculation screens
- g. **Enrollments:** Client's enrollment history showing specific programs (i.e. ADAP-M, DPI, SS, etc.) enrolled in with start and end date of each program.
- h. **Health Insurance Assessments:** Client's Health Insurance coverage history.
- i. **Medicaid Search:** Client's history of Medicaid status client selected during application intake.
- j. **Proof of Income:** Client's history of total monthly income as the client reported on application. View icon navigates user to the income page with the client's entry.
- k. **Document Upload:** History of all documents uploaded to the client's file with associated date of upload. All documents are viewable.
- l. **HIV Status:** History and status of HIV+ data.

### III. CASE NOTES

ClientTrack has a central location for all users to add and view notes detailing actions taken and information about the client, eligibility, case management, services, etc. Case notes are set up with each workgroup having different permissions to be able to read and/or write case notes. Therefore, all users may not be able to see all notes. For more detailed instructions for all workgroups, see the separate user guide "ClientTrack Case Notes User Guide".

#### A. Client Workspace

*The Case Notes are accessed from the Client Workspace menu options. Click Case Notes to view and add new notes.*

1. **Client Case Notes** history displays with a brief summary, date, and who entered the notes.
  - a. **Action Date:** The date the user entered the notes.
  - b. **Service Date:** The date the service took place.
  - c. **Note Type:** Depending on the workgroup you are logged in as, allows you to read specific note types. UDOH Eligibility workgroup have access to:
    - i. **Benefit Specialist Note:** Notes about Benefit Specialists activity. This may include, but not limited to, the action taken on Application, Recertification, and Self-Attestation, missing documentation, exception request, enrollment changes request, updates client reports etc.
    - ii. **Eligibility Note:** Notes about all things regarding eligibility, approval, program enrolled in, client detail affecting eligibility, exception request detail, income calculation explanations for unusual cases, enrollment changes, restriction reason, early disenrollment, etc.




- iii. **Note to Client:** Notes for the client to view through the Client Portal. For clients who have set up their online account for the Client Portal will be able to read notes written to them.
- d. **Regarding:** Subject the note is about.
- e. **User:** The user who entered the note.
- f. **Organization:** The organization the user is associated with.
- g. **Print:** Print box to check then print one or multiple notes at a time.

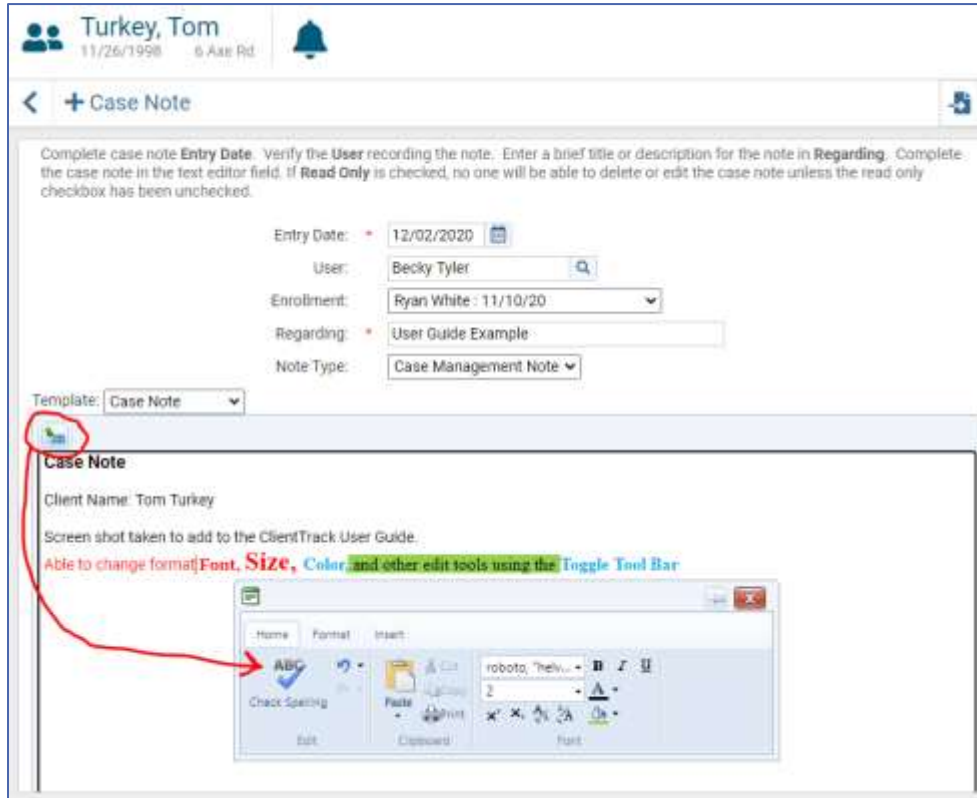
The client's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the **Print** box next to one or more case notes, and then click **Print Selected**.

6 results found.

Date	Note Type	Regarding	User	Organization	Print
12/01/2020	Application Note	BS and Eligibility do not get warning	Becky Tyler	Utah Department of Health	<input type="checkbox"/>
11/18/2020	Application Note	Recert Completed to start 1/1/21	Becky Tyler	Utah Department of Health	<input checked="" type="checkbox"/>
11/18/2020	Application Note	EC to SelectHealth effective 11/18/20	Becky Tyler	Utah Department of Health	<input type="checkbox"/>
11/12/2020	Application Note	Enrollment Change to ADAP-M	Becky Tyler	Utah Department of Health	<input type="checkbox"/>
11/10/2020	Application Note	Regence enrollment.	Becky Tyler	Utah Department of Health	<input checked="" type="checkbox"/>
11/10/2020	Application Note	Approved RW eligibility	Becky Tyler	Utah Department of Health	<input checked="" type="checkbox"/>

2. **Add New Case Note:** To add new notes, select the Add New Case Note button. Complete the boxes for the following:
  - a. **Service Date:** Auto defaults to today's date. If the service was rendered on an earlier date, you may change the date to the date the service was completed.
  - b. **User:** Auto defaults to the user logged in.
  - c. **Enrollment:** Select from the dropdown box the enrollment the note is about.
  - d. **Regarding:** Enter the subject for the note you are entering.
  - e. **Note Type:** Select from dropdown menu the type:
    - i. **Benefit Specialist Note:** Notes about Benefit Specialists activity. Notes about Application, Recertification, and Self-Attestation, missing documentation, exception request, enrollment changes request, updates client reports etc.
    - ii. **Services Note:** Notes about all things regarding Supportive Services (EFA, Food Vouchers, Transportation, Dental, etc.), referrals, decisions, denial reason, missing documentation, client interactions (document client phone calls), etc.
    - iii. **Note to Client:** Notes for the client to view through the Client Portal. For clients who have set up their online account for the Client Portal will be able to read notes written to them.
  - f. **Template:** A template to select from dropdown menu for the type of note entering.

- g. **Notes Text Box:** Text box to add notes. The text can be modified, change format, font, size, color, and other edit tools by clicking on the Toggle Floating Tool Bar button in the upper left corner of the text box. 



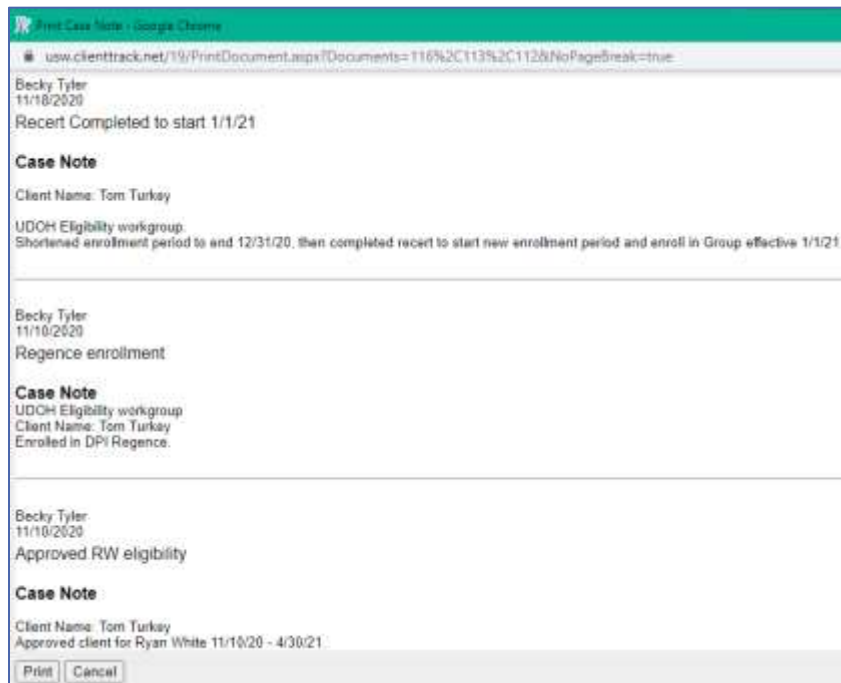
Complete case note **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text editor field. If **Read Only** is checked, no one will be able to delete or edit the case note unless the read only checkbox has been unchecked.

Entry Date: 12/02/2020  
User: Becky Tyler  
Enrollment: Ryan White : 11/10/20  
Regarding: User Guide Example  
Note Type: Case Management Note

Template: Case Note

**Case Note**  
Client Name: Tom Turkey  
Screen shot taken to add to the ClientTrack User Guide.  
Able to change format **Font, Size, Color** and other edit tools using the **Toggle Tool Bar**

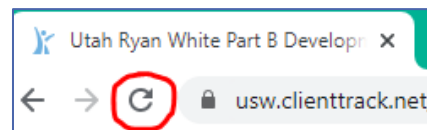
3. **Print Selected:** Check the note(s) to be previewed. This option opens a new window with the notes that were checked in complete detail all on one page. This way you do not have to open each note separately to view notes history. If you wish to print the notes, click the print button at the bottom of the page.



### B. Refresh Screen

*When making changes in ClientTrack and after saving the page, if you do not see the change, refresh your browser.*

1. Select **F5** on your keyboard or
2. Click the refresh button on your browser.



## 3. HOME WORKSPACE NAVIGATION

The Home workspace is where you view the Ryan White Part B Program enrollment list, application list, and manage your workload.

### I. ENROLLMENT LIST

The Enrollment List displays all clients currently enrolled in the Program.

#### A. Search Criteria

*The search criteria is optional to narrow or filter the list.*

1. Enter any single or combination of data elements you wish to search by then, click the Search button.
2. Each column of the list can be sorted by clicking the heading title.

#### B. Refresh Button

*Before selecting a client, click the Refresh button to update the list so that you have the most current information.*

### C. Enrollment List Client Data

*The Enrollment List displays all clients enrolled with a summary of enrollment status. The list is in a table format with columns and rows. Each column can be sorted by clicking the column heading name, or icon next to the title, and can be sorted ascending or descending.*

1. **Action button:** Lists the actions that are able to perform for each client. The action possibilities are based on the client's enrollment period.
  - a. **Select Client:** Takes you to the Client Dashboard.
  - b. **Recertification:** If client is due for recertification, click to start the recertification process.
    - i. Will only populate starting with the first day of the month before the enrollment end date.
    - ii. Takes you to the Client Intake form to start the recertification process.
    - iii. The data that was previously entered on the last recertification remains on the intake forms, except income. Update the information that has changed, and address the current income. Current income will need to be added.
  - c. **Self-Attestation:** If client is due for Self-Attestation, click to start the Self-Attestation process.
    - i. Will only populate starting with the first day of the month before the enrollment end date.
    - ii. Takes you to the Client Intake form to start the self-attestation process.
    - iii. The data that was previously entered on the last recertification remains on the intake forms, except income. Update the information that has changed, including current income.
2. **First Name:** Client's first name.
3. **Last Name:** Client's last name.
4. **Client ID:** Client's ID assigned by the program. First and third letters of first name, first and third letters of last name, date of birth MMDDYY
5. **Program Enrolled In:** The current program client is enrolled in as of the day viewing.
6. **Enrollment Status:** Client's current status within the Program.
  - a. **Due for Recertification:** Client is enrolled and a recertification is needed at the end of the enrollment period to continue with enrollment.
  - b. **Due for Self-Attestation:** Client is enrolled and a self-attestation is needed at the end of the enrollment period to continue with enrollment.
  - c. **In review:** The application is pending and is being reviewed by the UDOH eligibility team.
  - d. **Dis-Enrolled:** The client is no longer eligible and has been disenrolled from the Program.
  - e. **Not Eligible:** The client's most recent application was denied as not eligible for the Program.
7. **Enrollment Start Date:** The start date of the current eligibility period.

8. **Enrollment End Date:** The last day the eligibility period.
9. **Checked Out By:** Lists the name of the user who has opened the client's file and is working on it, i.e. completing eligibility determination, updating file, etc. If there is a name here, that user is the only user who can make changes, complete application, etc. Other users can still select client and view details, but not able to update or make any changes.

## II. APPLICATION LIST

The Application List displays all clients who have started or submitted an application, recertification or self-attestation and the status of it.

### A. Search Criteria

*The search criteria is optional to narrow or filter the list.*

1. Enter any single or combination of data elements you wish to search by then click the Search button.
2. To see all applications, leave search criteria blank.
3. Each column of the list can be sorted by clicking the heading title.

### B. Refresh Button

*Before selecting a client, click the Refresh button to update the list so that you have the most current information.*

### C. Application List Client Data

*The Application List displays all clients pending an eligibility decision. The list is separated by category: (1) Due for Recertification, (2) Due for Self-Attestation, and (3) New Applicants with a summary of application status. The list is in a table format with columns and rows. Each column can be sorted by clicking the column heading name.*

1. **Action button:** Lists the actions that are able to perform for each client. The action possibilities are based on the client's application status.
  - a. **Select Client:** Takes you to the Client Dashboard.
  - b. **View Application/Recertification/Self Attestation:** Takes you to the Client Intake workflow to view the application. You are unable to make any changes, or determine eligibility.
  - c. **Determine Eligibility:** For the UDOH Eligibility Specialist to review the application and make an eligibility decision.
2. **First Name:** Client's first name.
3. **Last Name:** Client's last name.
4. **Client ID:** Client's ID assigned by the program. First and third letters of first name, first and third letters of last name, date of birth MMDDYY.
5. **Status:** Displays the status of the application:
  - a. **Draft:** Application has been started but not completed or submitted.

- b. **Submitted:** Application has been completed, submitted, and waiting for an eligibility decision.
  - c. **In Review:** Application is being reviewed for an eligibility decision.
  - d. **Insufficient:** Application has been reviewed by an eligibility specialist which is incomplete and will need more information before a complete eligibility decision can be made.
  - e. **Sufficient:** Application has been reviewed and has been determined that it is complete, but an eligibility decision and enrollment has not been completed.
6. **Application Start Date:** The date the application was started.
  7. **Application Submission Date:** The date the application was completed and submitted for an eligibility decision to be made.
  8. **Request to Expedite Date:** If an application needs to be expedited, this is the date the requesting agency is requesting the application to be completed by.
  9. **Program Applied For:** The program the client is applying for.
  10. **Checked Out By:** Lists the name of the user who has opened the client's file and is working on it, i.e. completing eligibility determination, updating file, etc. If there is a name here, that user is the only user who can make changes, complete application, etc. Other users can still select client and view details, but not able to update or make any changes.
  11. **Assisted by:** Lists the user who assisted the client to complete the application.
  12. **Organization:** Displays which Organization/Agency the person who assisted the client is from.

### III. SELECT APPLICATION FOR ELIGIBILITY DETERMINATION

Navigate to your HOME Workspace, and select Application List from the menu. Search for Application Status "Submitted" and/or "Sufficient". This will filter the Application List to the applications that are ready for an eligibility determination.

#### A. Prioritization of Application Processing

*The Program prioritizes applications by the need of the client and/or the program. Prioritization of applications will be processed in the following order:*

1. **Expedited Requests:** Applicants whose case management agency has determined the client is in need of medication same day or by due date given by the agency.
2. **New client Applications:** Clients who have not been on the Utah Ryan White Program in the past, and are in need to start medication and services as soon as possible.
3. **Premium Payment, when premium is due:** Clients who are on a premium payment program (DPI, COBRA, Medicare Premium, EB-HIPP) need their premiums paid to avoid losing their insurance coverage.
4. **Enrollment Changes:** Depending on the program change from and to, may need to terminate or pay an insurance premium, access medication, etc. that will be in jeopardy if the change is not done timely.
5. **All others:** Clients recertifying on time to continue or reinstate Program coverage on a first come first serve basis.

## B. Filter Application List

*The auto sort when first enter this page, is sorted by “Application Start Date” with the most recent on top. To be able to find the applications with the highest priority, filter the Application List in the following way for each application type:*

1. **Expedited Requests:** Click the column header “Request to Expedite Date” to list the clients with the most recent expedited date on the top. If this column is clicked again, the expedited date will be at the bottom of the list. Process the application with the oldest dates first for a first come first served basis.
2. **New Applicants:** All the applications for new clients who have not been on the Utah Ryan White Program are listed in the “New Applicants” list. Click the “Application Submission Date” to list the clients with the oldest submission date on the top. If this column is clicked again, the most recent application submitted will be at the of the list. Process the application with the oldest dates first for a first come first served basis.
3. **Premium Files:** Sort the “Program Applying for” column which will sort all applications by program applied for. Select DPI clients first with the oldest dates first for a first come first served basis.
4. **Enrollment Changes:** Email received from case management agency. From Client Workspace, select Find Client, enter one or more search criteria, then search.
5. **All others:** Click the column header “Application Submission Date” to list the clients with the oldest submission date on the top. If this column is clicked again, the most recent application submitted will be at the of the list. Process the application with the oldest dates first for a first come first served basis.

## C. Select Client for Eligibility Determination

1. Click the blue action button located on the left side of the client. The actions you are able to take will populate in a dropdown list.
2. Select “Determine Eligibility”.
  - a. If Determine Eligibility is not on the list, the file may be checked out by another worker. Select the next client.

## 4. WORKFLOW NAVIGATION

The application is divided into workflow steps. You can see which step you are on and how many steps remain.

### A. Dynamic Workflow

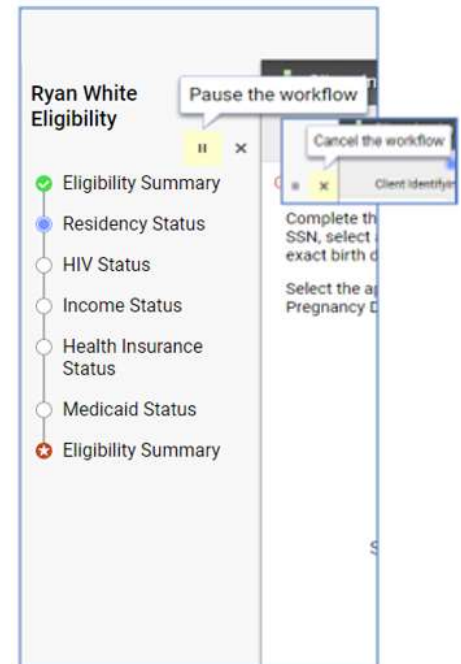
*The workflow guides the user to the next step once the current step is completed and saved.*

1. Depending on the client’s situation and how the application was completed, the workflow may be different for each client.
2. You may skip around to different sections until the eligibility determination is made. However, each section must be saved before an eligibility determination can be made.

## B. Pause or Cancel Workflow

*If you are unable to complete a page, application, or workflow, you need to pause or cancel the workflow. If you do not pause or cancel, it will cause errors, duplicates, and/or conflicting data.*

1. **Pause the Workflow:** Clicking the pause button, **||**, will pause the workflow and save the spot where you left off. You will then be navigated to the Client Dashboard.
  - a. You will be able to find your Paused Workflows on your Home Workspace.
  - b. To pick back up at the same place you left off:
    - i. Navigate to your Home Workspace.
    - ii. Select Paused Workflows from the left side menu.
    - iii. Click the Resume action button on the workflow you wish to continue working.
2. **Cancel the Workflow:** Clicking the cancel button, **X**, will delete the instance of the workflow and cannot be undone, however canceling a workflow will not affect the data entered during the course of the workflow.
  - a. A confirmation pop-up window will ask if you are sure you want to cancel the workflow. Select Yes or No:
    - i. **Yes:** The workflow stops and you will be navigated to the client's dashboard.
    - ii. **No:** You are directed back to the page you are currently on before clicking on the Cancel the Workflow button.
  - b. Examples when to cancel the workflow include but are not limited to:
    - i. You selected the wrong client.
    - ii. You started a workflow, but did not intend to. For example, from the application list, the action button selected was "View Application" or "Determine Eligibility", when you intended to "Select Client".



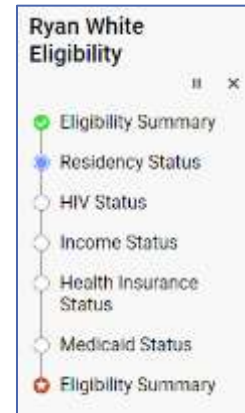
## C. Workflow Steps Check List

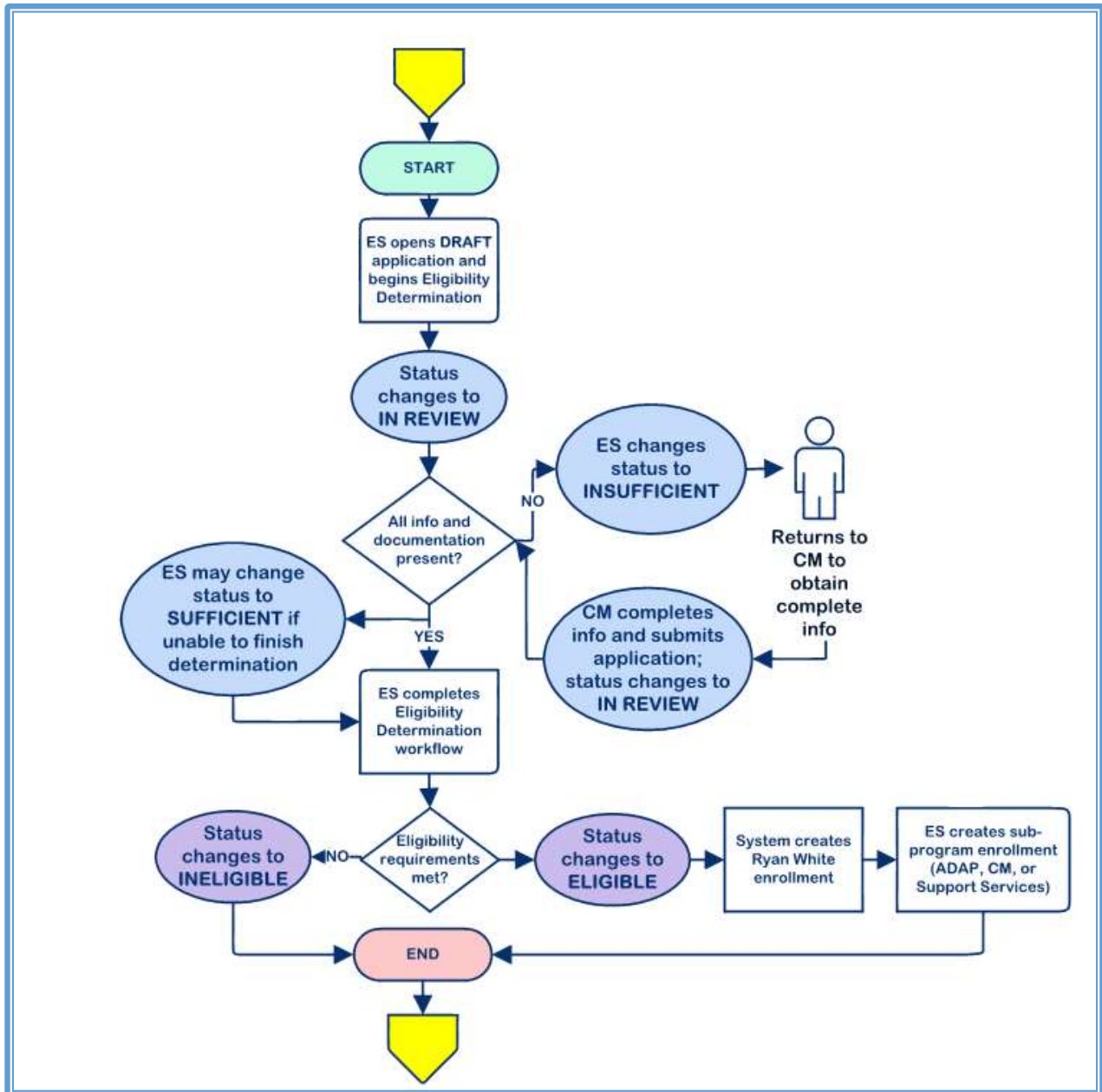


To help navigate a workflow, ClientTrack displays the completed, current, and remaining steps within the workflow. These are found at the top of the page and on the left menu.

1. **Green Check:** Completed step, and can be returned to as needed to make changes.
2. **Blue Dot:** Current step working on and displayed.
3. **White Dot:** Remaining steps within the workflow.
4. **Red Star:** Started but not completed and went back to on of the previous pages in the workflow.

#### D. Flowchart Application Workflow





## 5. ELIGIBILITY DETERMINATION

All client applications submitted to the Program must receive an eligibility determination conducted by Program staff trained on Program policies and procedures. Only complete applications with the status of “Submitted” will receive an eligibility determination. Incomplete and draft applications with the status of “Insufficient” or “Draft” will not be reviewed.

This section takes you through the eligibility determination workflow step by step to show how to determine eligibility. After selecting an application for review, complete the following workflow.

## I. DETERMINE ELIGIBILITY

After selecting “Determine Eligibility”, the Application Assistance page from the client application intake is displayed. This is also the Eligibility Summary page if the workflow is paused or canceled, then later return to start the determine eligibility workflow again.

### A. Eligibility Summary

1. **Application Assisted by:** The person who assisted the client with the application (Benefit Specialist, Case Manager, etc.)
2. **Organization:** The organization the assistant is associated with.
3. **Program Applied For:** The program that was selected as the program client is applying for.
4. **Application reason:** New clients who are applying for Utah Ryan White for the first time, the reason(s) for the new application is displayed.
5. **Request for Expedite Date:** If the application is requesting expedited service, the date requesting file to be completed by and reason expedited is needed.
6. **Request Comment:** Reason expedited is being requested.
7. **Contact information for follow-up:** Text box for contact information, questions or optional notes from the application assistant.
8. **Comments:** Text box to add any comments or notes about the application. These comments will also be displayed on the last page of the eligibility determination workflow, which will be editable or to add more comments. It may be a good idea to enter the program applying for as that is not displayed on the last page, or any other notes that would be important to display.

The screenshot shows the 'Application Assistance' page for a client named 'Test Minor' (Client ID: TSCI011106). The page is titled 'Eligibility Determination' and includes a sidebar for 'Ryan White Eligibility' with options for 'Eligibility Summary' and 'Certification of Accuracy and Completeness'. The main content area contains the following fields:

- Application Assistance Provided by:** Debi Fluckiger
- Organization:** Utah Department of Health
- Program Applied For:** ADAP/E COBRA (dropdown menu open showing options: Establishing Care, New to Medications, New Diagnosis, New to Utah, Lost Medicaid, Newly Unemployed, Previously Over Income, Recently Released From Prison, Seeking Supportive Service(s), Other)
- Application Reason (select all that apply):** (empty)
- Request to Expedite Date:** (empty)
- Contact Information for Follow-up:** test

## II. RESIDENCY STATUS

Client identifying information, contact information, and the proof of Utah residency document, is displayed.

### A. Client Identifying and Contact Information

1. Review the form with the information given.
2. **Verified Household Size:** During the application process, the client stated their household size. If the household size is greater than 1, a household table is populated with the name(s), relationship and age of who is listed in the household size. The client's name should not be listed on the table. Review the list of names and relationship, then enter the verified household size number in the box provided. See Program policy of who to count as part of the household size.
3. **Proof of Residency Document:** The document type and document that was submitted with the application is available to view. Click on the associated file and view per Program policy to determine if document meets acceptable requirements.
4. **Missing Social Security Number:** If the client did not provide their Social Security Number, there is a box asking if you want to enter the number now. Select Yes.
  - a. If you have the SSN, i.e. the client provided it, found on Medicaid search, etc., add the number.
  - b. If the client has not provided their SSN, refer to Program policy and procedures to assign the client a temporary number. Add the assigned number.

### B. Eligibility Review: Residency Status

*Determine eligibility status for residency. Select from the dropdown menu the option that corresponds to the client's residency.*

1. **Insufficient:** The document provided does not meet Program policy for acceptable proof of residency.
2. **NOT a Utah Resident Confirmed:** The document provides does not show that client is a Utah resident.
3. **Utah Residency Confirmed:** The document provided is acceptable proof of residency.

4. **Comments:** Comment box to add any notes that would need explained or flagged (this similar to the CFC notes currently being used.) Examples: reason insufficient, type of POR, expiration date of POR, etc.

### III. HIV STATUS

Depending if the client is a new client who has not been on the Utah Ryan White Part B Program, or a returning client, the HIV Status form populates accordingly. New clients will have complete HIV diagnosis information from provider records, where recertifications and self-attestations will ask if currently taking HIV medication.

#### A. Applications - Medical Provider Information

*New Utah Ryan White Part B clients need the HIV+ diagnosis information to be completed with the information obtained from the diagnosing clinician or HIV Provider. The Provider's documentation used will be required to be uploaded at the end of the application.*

1. **HIV Document:** Download the HIV document and view for accuracy. Update any fields on the form, if needed.
2. **Eligibility Review: HIV Status:** Select from the dropdown menu.
  - a. **HIV Negative – Confirmed:** The HIV document provided did not have a positive test result.
  - b. **HIV Positive – Confirmed:** The HIV Document provided confirmed the client tested positive for HIV.
  - c. **Insufficient:** The HIV document provided is incomplete or not acceptable proof of HIV positive test results.

The screenshot shows a form titled "Eligibility Review: HIV Status". There are two main fields: "HIV Status" and "Comments". The "HIV Status" field has a dropdown menu that is currently open, displaying the following options: "HIV Positive - Confirmed" (which is highlighted in blue), "-- SELECT --", "HIV Negative - Confirmed", "Insufficient", and "Acceptable HIV confirmation". To the right of the dropdown, a tooltip is visible with the text: "need UDOH form was provided medical documentation. Acceptable HIV confirmation."

3. **Comments:** Add comments if needed.

#### B. Recert/SA - Medication Adherence

*Returning clients completing a Recertification or Self-Attestation will answer if they are currently taking HIV medication*

1. **Eligibility Review: HIV Status (Taking HIV Medications):** Select from the dropdown menu.
  - a. **Not Taking Medications**
  - b. **Taking Medications**
2. **Comments:** Add comments if needed.

### IV. PROOF OF INCOME

Depending on if the client has income or not, will determine which page is displayed. For client's with income, the Proof of Income table is displayed to complete an

income calculation based on the client's income documents. If the client does not have any income, the Affidavit of Zero Income will display.

#### A. Applicant and Household Information

*Marital Status and Household Size are auto populated from the Client Identifying Information page. If the client is married, the form will display the information for both the client and the client's spouse.*

1. **Applicant and Household Information:** Displays marital status, verified household size, and questions about income and employment for client, and spouse if married.

#### B. Monthly Income – Applicant/Spouse

*If the client reports income for self (and/or spouse if married), the income table will populate. Each person who receives income will have their own income table and is labeled as "Monthly Income – Applicant" and "Monthly Income – Spouse".*

1. **View income documentation.** To make a correct income calculation, you will need to view the client's income page of the application, and the Proof of Income documentation provided.
  - a. **View Client's Proof of Income:** At the bottom of the page, click on "View Client's Proof of Income" button. This will open a new window and display the Intake Proof of Income page from the client's application. Review to see the income the client reported and any comments.
  - b. **Income Documentation:** Scroll down on the page to the Income Document, and click document to open another window with the income verification. Open all documents to be able to complete your income calculation.

The image displays two screenshots of the ClientTrack system. The left screenshot shows the 'Proof of Income' page with a red circle around the 'View Client's Proof of Income' button. The right screenshot shows the 'Proof of Income' page with a red arrow pointing to the 'View Client's Proof of Income' button.

The right screenshot shows the 'Proof of Income' page with the following information:

Do you (just you, no other household members) receive an income? Yes

Are you Employed? Yes

Do you work 30 hours per week or more? Yes

Does your spouse receive an income? Yes

Is your spouse employed? Yes

Does your spouse work 30 hours per week or more? No

Monthly Income – Applicant


Enter information below for YOUR income. Indicate \$0 if none.

Type	Average Income*	Frequency	Hours Per Week	Additional Sources	Monthly Income	Comment
Wages/Salary/Tips/Commission/Bonus (Formal Employment)	\$10.00	Hourly	33.50		\$1,213.33	
Wages/Salary/Tips from Informal Employment with no paystub	\$0.00	Other			\$0.00	
Self Employment	\$0.00	Other			\$0.00	
Social Security Income	\$0.00	Other			\$0.00	

2. **Income Table:** The income list each income type, frequency of pay, client comments and calculates the monthly and annual income. For each **Type of income** reported and verified with acceptable documentation, complete the following:

Type	Average Income (Calculated)*	Frequency	Additional Source(s)	Additional Source(s) Annual Income	Monthly Income	Specialist Comment	Months	Annual Income	Total Annual Income
Wages/Salary/Tips/Commission/Bonus (Formal Employment)	<input type="text"/>	<input type="text" value="-SELECT-"/>	<a href="#">0</a>	\$0.00	\$0.00	<input type="text"/>	<input type="text" value="12"/>	\$0.00	\$0.00

- a. **Average Income (Calculated):** Enter the verified Average Income amount.
  - i. **Variable Income:** If the income is variable and you have more than one item (e.g. several check stubs, employer printout, etc.), you will need to add each amount to the *calculation worksheet*. See [Income Calculation Worksheet in section C](#) below.
  - ii. **Fixed Income:** If the income is the same amount each pay period (e.g. Social Security, Retirement, etc.), there is no need for the income calculation worksheet.
- b. **Frequency:** Select from the dropdown menu how often of the amount entered in the Average Income field:
  - i. **Hourly:** The dollar and cents amount received per hour. If hourly is selected, another field populate:
    - **Hours Per Week:** Enter the average number of hours work each week.
  - ii. **Weekly:** Paid every 7 days
  - iii. **Every Two Weeks:** Paid every 14 days
  - iv. **Monthly:** Paid once a month
  - v. **Twice a Month:** Paid two times a month, usually the same day of the month (i.e. 1<sup>st</sup> and 15<sup>th</sup>, 5<sup>th</sup> and 20<sup>th</sup>, or 15<sup>th</sup> and last day of the month).
  - vi. **Annually:** Paid once a year, or self-employed and calculates year income when complete annual tax return.
- c. **Additional Source(s):** If more than one source (i.e. employer/benefit) for the same Type of income, click on the hyperlink [0](#) under Additional Source(s) which will open another line to enter additional income source (same as described above). The hyperlink number will change from zero to the number of additional lines/income sources added.
  - i. For example, two part-time jobs: Enter the Average Income, Frequency, (and Hours Per Week) for the first job. Then click the Additional Source(s) hyperlink and enter the Average Income, Frequency, (and Hours Per Week) for the second job.
- d. **Additional Sources(s) Annual Income:** The total annual amount from all additional source(s) for the income type.
- e. **Monthly Income:** ClientTrack auto calculates the average monthly income from the data entered. If the client has more than one source of income, the Monthly Income on the line will remain the monthly amount of the income source listed for the line (i.e. it does not include the income for additional sources).

- i. For example, first job \$2,500.00/month will show \$2,500.00 in Monthly Income. Second job, \$1,000.00/month will show \$1,000.00 for the Monthly Income on the second row. The Monthly Income amount on the first row, remains \$2,500.00.
  - f. **Specialist Comment:** Optional text box to enter comments (e.g. employer name, company, agency etc.).
  - g. **Months:** The number of months in a year the income is received. If the income type is seasonal and is received only certain months of the year, the number of months in the year the client receives the income is entered.
  - h. **Annual Income:** ClientTrack auto calculates the annual income from the data entered. If there is more than one source of the same type of income, this amount does not count in other source(s) income.
  - i. **Total Annual Income:** Total income of all sources for the income type.
  - j. **Undo Changes Icon:** If you need to remove the income, or clicked in a space in error, click the Undo Changes icon  at the end of the row.
3. **Estimated Applicant’s Annual Income:** Enter the client’s Total Annual Income amount of all income sources. ClientTrack totals all income for each column under all sources of income. Enter the amount on the bottom right corner, Total Annual Income, of the income table.

Type	Average Income (Calculated)*	Frequency	Additional Source(s)	Additional Source(s) Annual Income	Monthly Income	Specialist Comment	Months	Annual Income	Total Annual Income
Veteran's Benefits		- SELECT -	0	\$0.00	\$0.00		12	\$0.00	\$0.00
Other Income		- SELECT -	0	\$0.00	\$0.00		12	\$0.00	\$0.00
					\$2,500.00			Total Annual	\$30,000.00
Estimated Applicant's Annual Income:									\$30,000.00

4. **Estimated Spouse’s Annual Income:** If both client and spouse have income, complete the Monthly Income – Spouse income table following the same steps above. Enter the spouse’s Total Annual Income amount of all income sources

Other Income		- SELECT -	0	\$0.00	\$0.00		- SEL	\$0.00	\$0.00
					\$800.00			\$9,600.00	\$9,600.00
Estimated Spouse's Annual Income:									\$9,600.00

C. Income Calculation Worksheet

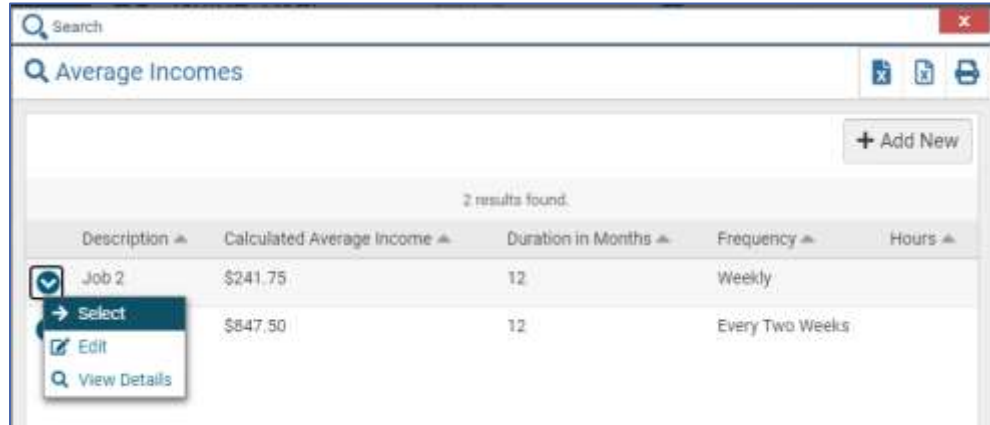
Depending on the income documentation provided, will determine if the income calculation worksheet will be used. If the income is variable and you have more than one item (e.g. several check stubs, employer printout, etc.), you will need to add each amount to the calculation worksheet. If the income is the same amount each month (e.g. Social Security, Retirement, etc.), there is no need for the income calculation worksheet. Complete the Income Calculation Worksheet by completing the following:



1. **Search Button:** For the type of income that requires a worksheet, click on the search button next to the Average Income (Calculated) field.

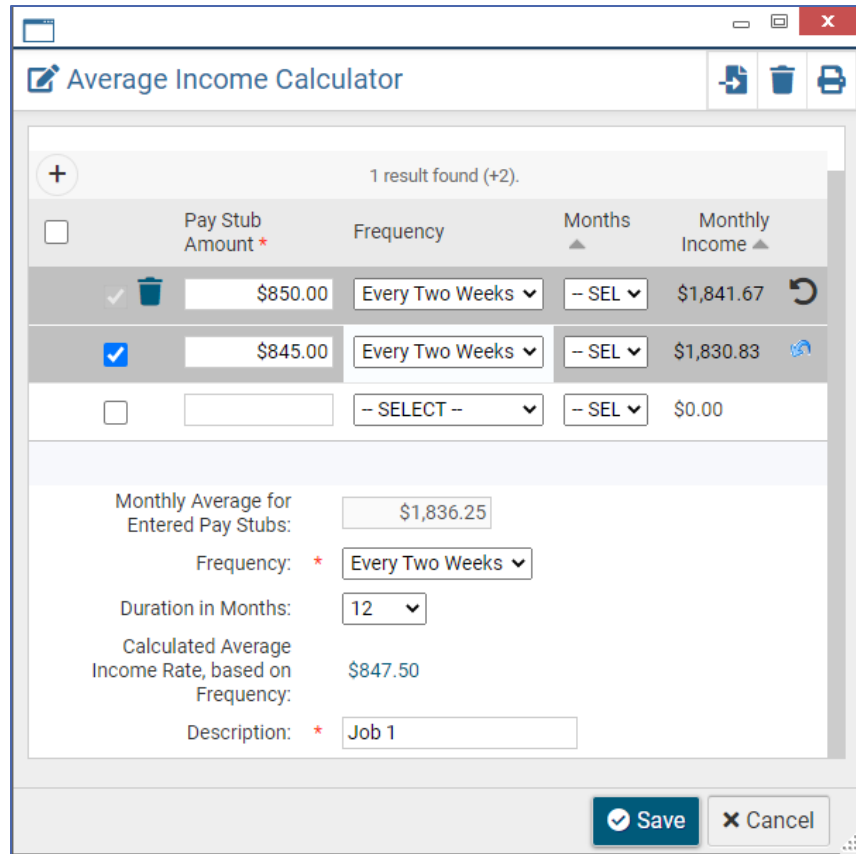
The screenshot shows a form with several fields: Type, Average Income (Calculated)\*, Frequency, Additional Source(s), Additional Source(s) Annual Income, Monthly Income, Specialist Comment, Months, Annual Income, and Total Annual Income. The 'Average Income (Calculated)\*' field is highlighted with a red circle around the search icon.

2. **Average Incomes:** A pop-up window "Average Incomes" will appear. All previous income sources and calculations which have been entered in the past, are saved with the previous calculations.
  - a. For each entry, the action button has the following options:
    - i. **Select:** Use this income to populate onto the main income screen to be used in the FPL calculation.
    - ii. **Edit:** Make edits to entry entered.
    - iii. **View Details:** View only display of what was entered.

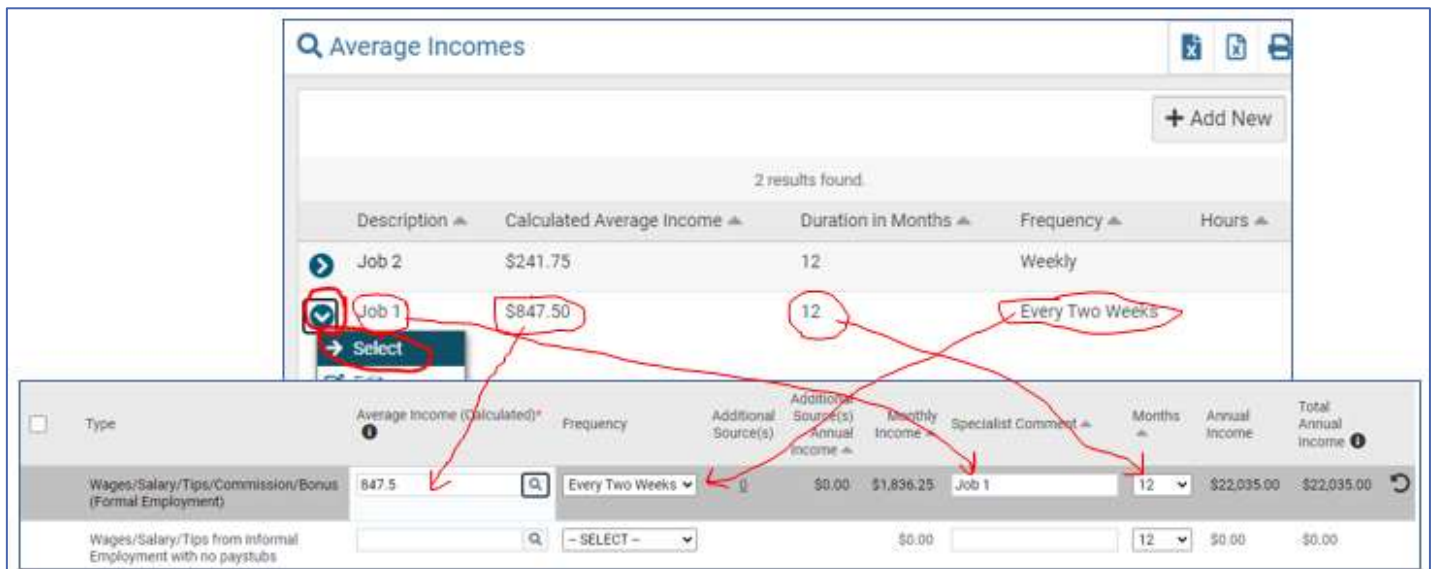


3. **Add New:** If the income to be used is not on the Average Incomes page, click Add New to enter in each check for a new calculation.
  - a. **Average Income Calculator:** Enter the following required fields:
    - i. **Pay Stub Amount:** List each pay stub gross amount.
    - ii. **Frequency:** Select frequency the check is received.
      - **Hourly:** If select hourly, Hours Per Week will populate. Enter the average number of hours work each week.
    - iii. **Months:** Select the number of months the income is earned during the year.
    - iv. **Monthly Income:** ClientTrack auto calculates the monthly income amount based on the data entered for each entry.
    - v. **Monthly Average for Entered Pay Stubs:** ClientTrack auto calculates the average monthly income for all pay stubs entered.
    - vi. **Frequency:** Select frequency the checks are received.
    - vii. **Duration in Months:** Select the number of months the income is earned during the year.
    - viii. **Calculated Average Income Rate, based on Frequency:** ClientTrack auto calculates the average income for pay period.

- ix. **Description:** Enter name of employer or other detail to know what income is being used.
- x. **Save:** Click the save button. The calculated income will be pulled over to the Average Incomes page.



- 4. **Select:** From the action button, click the Select button for the income calculation to be populated into the client’s income page.





#### D. Affidavit of Zero Income

If the client and spouse, if applicable, report no income, the Proof of Income page will show the \$0 income client reported. You must view the client's Affidavit of Zero Income "AZI" as this is the client's Proof of Income.

1. **View Client's Affidavit of Zero Income:** Click the button on the bottom of the page to view. A separate popup window will open displaying the AZI.

The screenshot displays the 'Ryan White Eligibility' interface. On the left is a navigation menu with options: Eligibility Summary, Residency Status, HIV Status, Income Status, Health Insurance Status, Medicaid Status, Certification of Accuracy and Completeness, and Eligibility Summary. The main area is titled '+ Proof of Income' and contains the following information:

- Marital Status: Married
- Household Size: 3
- Do you (just you, no other household members) receive an income? No
- Does your spouse receive an income? No

Below this is the 'Income Inputs for Eligibility' section:

Applicant's Annual Income:	\$0.00
Total Annual Household Income:	\$0.00
Household Size:	3
Federal Poverty Level:	0.00 %

At the bottom of the main page is an 'Eligibility Review: Proof Of Income' section with two buttons: 'View Client's Proof of Income' and 'View Client's Affidavit of Zero Income'. A red circle highlights the second button, with a red arrow pointing to a popup window titled 'Affidavit of Zero Income - Google Chrome'. The popup window shows the 'Affidavit of Zero Income' form with the following sections:

- Monthly income - Applicant**: Enter information below for YOUR income. Indicate \$0 if none.
  - Wages/Salary/Tips/Commission/Bonus (Formal Employment): \$0.00
  - Wages/Salary/Tips from Informal Employment with no paystubs: \$0.00
  - Self Employment: \$0.00
  - Social Security income: \$0.00
  - Benefits (Life Insurance, Disability, Educational Assistance, Survivors, etc.): \$0.00
  - Capital Gains, Stocks, Bonds, Cash, Dividends, Trust, Investment Income: \$0.00
  - Public Assistance/Unemployment: \$0.00
  - Retirement Pensions/Annuity/401k etc.: \$0.00
  - Alimony: \$0.00
  - Rental Income: \$0.00
  - Veterans Benefits: \$0.00
  - Other Income: \$0.00
  - Total Monthly Household Income: \$0.00
- I hereby attest that my household is not currently receiving or expecting to receive any of the income types listed above.
- How do you pay for your financial obligations: Living with parents who supply all expenses, Looking for work.

2. **Income Type and Amount:** A list of all income types will populate. During application intake, the client is required to enter an amount of income for each type of income. All income will be zero due to the fact that during the application intake, the AZI will not accept any other amount. If they enter an amount, they will receive the error message "You have indicated your income is greater than zero. Please go back and report your household income." They will then need to navigate back to the income page and complete the income table.
3. **Client attests their household does not have any income:** After the Total Monthly Household Income of \$0.00, the client is asked to read the statement "I hereby attest that my household is not currently receiving or expecting to receive any of the income types listed above". They check the box for confirmation.
4. **How Meeting Financial Obligations:** The client must report how they are meeting their financial obligations. This is a text box with explanation. If there are any questions and/or you need further explanation, select Insufficient for the "Eligibility Review: Proof of Income" selection. Enter comments as to what is missing.

### E. Eligibility Review: Proof of Income:

*Determine the income eligibility for income by the Federal Poverty Level.*

1. **Income Inputs for Eligibility:** The client's, and spouse's if applicable, annual income amounts entered in the Estimated Applicant's/Spouse's Annual Income, or \$0.00 if AZI was completed, is displayed at the bottom of the page. ClientTrack totals the income, displays the household size and Federal Poverty Level.

**Income Inputs for Eligibility**

Applicant's Annual Income:	\$30,000.00
Spouse's Annual Income:	\$3,600.00
Total Annual Household Income:	\$33,600.00
Household Size:	2
Federal Poverty Level:	194.90 %

**Eligibility Review: Proof Of Income**

Proof Of Income: \*

Comments:  summarized at process termination is

**Proof of Income**

**Income Inputs for Eligibility**

Applicant's Annual Income:	\$0.00
Total Annual Household Income:	\$0.00
Household Size:	3
Federal Poverty Level:	0.00 %

**Eligibility Review: Proof Of Income**

Proof Of Income: \*

Comments:

2. **Proof of Income:** Select from the dropdown menu what income category client is in.
  - a. **Insufficient:** The proof of income provided is incomplete.
  - b. **Over 500% FPL Confirmed:** Income is at or above 500% FPL – Denied all
  - c. **Under 250% FPL Confirmed:** Income is under 250% FPL – Eligible ADAP/SS
  - d. **Under 500% FPL Confirmed:** Income is between 250% - 500% FPL – Eligible CM only.
3. **Comments:** Comment box for optional comments to be entered. Examples: Difficult income calculation explanation, missing check stubs, reason for insufficient selection, AZI how meeting expenses, etc.

## V. HEALTH INSURANCE STATUS

This section addresses vigorous pursuit for other health insurance plans, sources, or programs the client is enrolled in or has access to. Depending on if the client has another payor source or not, will depend on which page will be displayed.

### A. No Health Insurance Coverage

*Displays the reason client selected during client intake for being uninsured, and not having health insurance coverage through Employer, Spouse or Parent.*

1. **No Health Insurance – Uninsured:** Selected reason. Depending on reason, more reasons and explanations may be populated. If reason is “Other” documentation is required and should have been uploaded and displayed to download and view.
2. **No Health Insurance – Employer:** Selected reason. Depending on reason, more reasons and explanations may be populated. If reason is “Other” documentation is required and should have been uploaded and displayed to download and view.
3. **No Health Insurance – Spouse:** Selected reason. Depending on reason, more reasons and explanations may be populated. If reason is “Other” documentation is required and should have been uploaded and displayed to download and view.
4. **No Health Insurance – Parent:** Selected reason. Depending on reason, more reasons and explanations may be populated. If reason is “Other” documentation is required and should have been uploaded and displayed to download and view.



The screenshot displays the 'Insurance' section of the ClientTrack system. It features four distinct sections, each with a title and a corresponding reason for no health insurance coverage:

- No Health Insurance - Uninsured:** Health Insurance Status - Uninsured: I do not have health insurance available to me
- No Health Insurance – Employer:** Health Insurance Status - Employer: I am unemployed
- No Health Insurance Coverage – Spouse:** Health Insurance Status - Spouse: My spouse is unemployed
- No Health Insurance Coverage – Parent:** Health Insurance Status - Parent: I am age 26 or older

### B. Health Insurance Coverage

*List of health insurance coverage with status and plan detail.*

1. **Active and Not Active Insurance List:** The list of all insurance plans that have been entered into the system are displayed.
  - a. **Status:** The insurances are grouped into Active and Not Active status.
  - b. **Action Button:** Click to view/update insurance detail.

- c. **Insurance Type:** List of the insurance type as defined by the Program.
- d. **Insurance Provider Name:** The insurance company name.
- e. **Effective Start Date:** The start date the insurance became effective.
- f. **Effective End Date:** The date the insurance ended or is set to end.

The screenshot displays the 'Insurance' management interface. The top section shows 'Insurance Status: Yes' and '3 results found'. Below this is a table with columns for 'Insurance Type', 'Insurance Provider Name', 'Effective Start Date', and 'Effective End Date'. The table is divided into 'Active' and 'Not Active' sections. In the 'Active' section, the first row is highlighted in pink and has a red circle around a checkmark icon. A tooltip 'View/Update Insurance Source' is visible over this row. The second row in the 'Active' section is also highlighted in pink and shows 'VA' as the provider name. The 'Not Active' section contains one row with '1/1/2020' as the effective start date. Below the table is a section for 'Health Insurance Document' and 'Associated File', with an 'Insurance Card' document icon. To the right, a detailed view of the selected insurance plan is shown, with a red circle around a back arrow icon in the top left corner. The detailed view includes fields for 'Type of Health Insurance Coverage', 'Effective Dates', 'Next Open Enrollment Date', 'Status', 'Insurance Provider', 'Plan Name', 'Policy Holder', 'End Date', 'High Risk Pool', 'HIV Provider In-Network', 'Access to HIV Medication', 'Out of Pocket Maximum', 'Select One', and 'Amount Contributed to Out of Pocket Maximum'. At the bottom right of the detailed view, there are 'Save' and 'Cancel' buttons, with a red circle around the 'Cancel' button.

2. **Insurance Plan Detail:** View only. Unable to make changes during the eligibility determination. To view plan details for listed insurance, complete the following:
  - a. **Action Button:** Click the action button.
  - b. **Click View/Update Insurance Source:** The plan details page opens new page with plan details.
  - c. **Back/Cancel:** When finished viewing, click the back button (< upper left corner) or the Cancel button (bottom right corner).

### C. Eligibility Review: Health Insurance

*Determine the vigorous pursuit for other health insurance status.*

1. **Health Insurance:** Select from dropdown menu.
  - a. **Declines Health Insurance:** Client has marked that they decline to enroll in available health insurance. Enter reason in Comments. If client is being placed on a restricted program, comment on when the restriction period will start.
  - b. **Insufficient:** The documentation is incomplete. If this option is selected, the client will not be eligible to enroll in any program.
  - c. **No Other Payor Source Identified:** Client is not enrolled in health insurance and does not have access to other insurance. This option will also be used for insurance plans that are unaffordable or insufficient.
  - d. **Other Payer Source(s) Identified:** Client is enrolled in health insurance.
2. **Comments:** Comment box for optional comments to be entered. Examples: reason for declining insurance, restriction notes, requirements before next eligibility period (i.e. must enroll in insurance next open enrollment), EB-HIPP forms needed, etc.

## VI. MEDICAID STATUS

Displays client's Medicaid status reported on application. Medicaid eligibility look up (MMIS search) will also be entered on this page.

### A. Client Identifying Information

*The client's name, birth date, Social Security Number are displayed to make it easier to complete the MMIS search.*

### B. What Is Your Medicaid Status?

*The options client selects from during intake are:*

1. Yes, I am enrolled.
2. I applied but was denied: Denial reason text box must be completed.
3. I am still awaiting a decision about my Medicaid eligibility:
  - a. Application Submitted: Select Yes or No
    - i. Yes: Application Submission Date.
    - ii. No: No other questions.



4. No, I have not applied:

a. Medicaid Not Applied Reason.

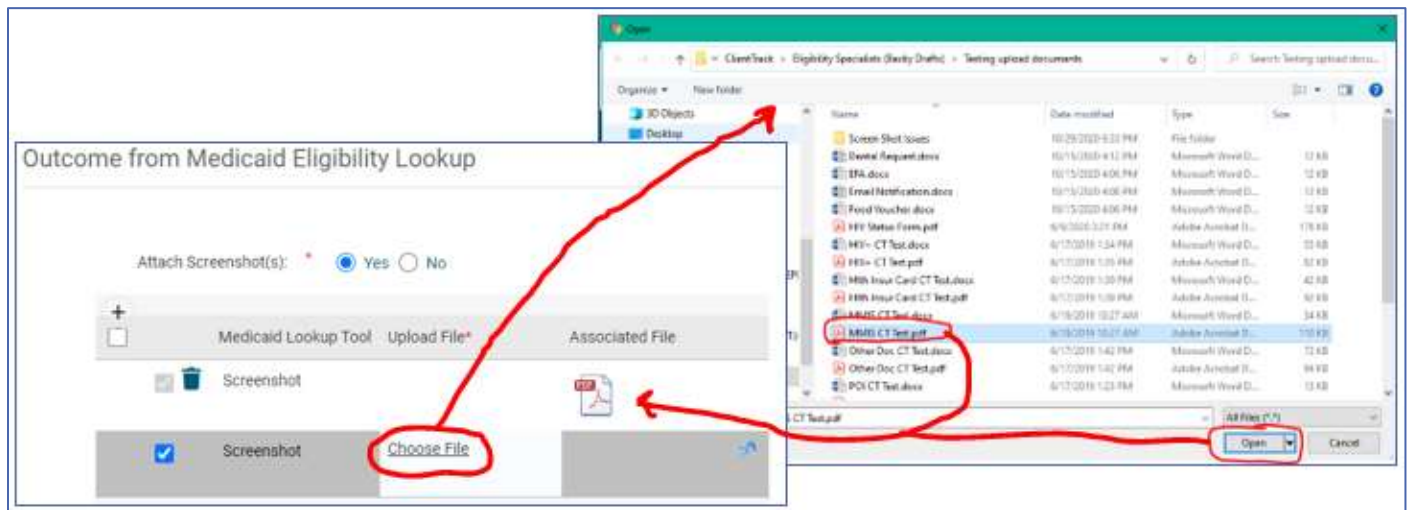
C. Outcome from Medicaid Eligibility Lookup

Complete an MMIS search for client, as internal procedures instructs. Record the results. Depending on how the form is filled out, will populate different required fields to complete.

1. **Attach Screenshot(s):** Did MMIS generated a search result for the client?

a. **Yes:** Document upload requirement is populated.

- i. Click Choose File which will open your computer files.
- ii. Select the file of the client's MMIS screenshot by double clicking the name or click name and click the Open button.



b. **No:** Search criteria populates. Note: the client's name birth date, SSN are at the top of the page to make it easy to cross reference MMIS name search.

- i. **Social Security Number:** Enter the client's social security number entered into MMIS. For client with a Program-generated SSN or for whom an SSN is otherwise unavailable, leave blank.
- ii. **Lookup Date:** Enter the date the MMIS search was completed.

- iii. **Search Criteria Entered:** Text boxes populate to enter in client's names searched in MMIS. Enter each name searched in separate text boxes.

2. **Eligibility, based on lookup:** Select eligibility results from the MMIS search:
- Medicaid Ineligible:** MMIS search results show the client is not eligible for the current time period.
  - Medicaid Eligible:** MMIS search results show the client is currently eligible for Medicaid.
    - Eligible as of:** Enter date client's continuous eligibility started within the previous 12 months.

#### D. Eligibility Review: Medicaid Status

*Confirm Medicaid eligibility status.*

- Medicaid Status:** Select from the dropdown menu.
  - Insufficient:** The client's answer as to their Medicaid status is incomplete or needs more information.
  - Medicaid Eligibility Confirmed:** MMIS search result displays client is currently eligible for Medicaid.
  - Medicaid Ineligibility Confirmed:** MMIS search result displays client is not currently eligible for Medicaid.

Eligibility Review: Medicaid Status

Medicaid Status: \* -- SELECT --

Comments: te or dates or er here.

2. **Comments:** Comment box for optional comments to be entered. Examples: Client's report from application, required to apply for Medicaid due to income under FPL, exceptions, refused to apply, restrictions, etc.

## VII.AUTHORIZATION FOR RELEASE OF INFORMATION

During the application process, the Release of Information is next in the workflow. The eligibility determination does not show the Release of Information during the workflow. However, it is viewable from the Client Home, by going to the Client Dashboard.

### A. Navigation to the Authorization for Release of Information

1. **Clients workspace:** Navigate to the Clients workspace (client dashboard).
2. **Client Information menu:** Click on Authorization for Release of Information.
3. **View:** Click the View button.

ClientTrack

Guide, User  
1/1/2000 999 Main St

Authorization for Release of Information

Displays the 's history of Authorization for Release of information forms.

Created Date	Release Information to Others
12/07/2020 3:34PM	Yes, Authorize

4. **Authorization for Release of Information form:** The form populates and if the client agreed to authorizing anyone, the information will be listed here.
  - a. Not all fields are mandatory. Only the fields with a red asterisk are required: Type, Name, and Aware of Client Situation.

- I agree check box:** The client must check this box during intake in order to make the form official.

**Authorization for Release of Information**

This request and authorization applies to information gathered through Utah Ryan White Part B Program activities.

I hereby authorize the Utah Ryan White Part B Program to release information to the following individual(s):  Yes, Authorize

Type	Relationship	Name	Aware of Client Situation	Office Phone	Home Phone	Address	City	State	Zip	Email	Alt Phone	Alt Phone Type
	Best Friend											
	Spouse											
	User 2:	Yes										

**Warning:**

- I understand that my records are protected under Federal regulations and cannot be disclosed without my written consent unless otherwise provided for under the regulations.
- This document serves as my consent for the release of information to the individual(s) listed above.
- I understand that I may revoke this consent at any time, in writing, except to the extent that action has been taken in reliance on it.

I agree

### VIII. CERTIFICATION OF ACCURACY AND COMPLETENESS

Legal documentation and signature. Sections Certificate of Application Accuracy & Completeness, Authorization to Verify Information, Update Information and Communication, Disclosure Consent, and Client Rights and Responsibilities.

#### A. Signature and Signature Date

- View client’s signature.
- Signature Date is auto populated as the day the client signed.
- Click No Changes

**Certification of Accuracy and Completeness**

**DISCLOSURE CONSENT:**

- I understand that my records are protected under State and Federal regulations and cannot be disclosed without my written consent.
- I understand that information can be released for billing, chart audits, program monitoring/quality management, data reporting, health insurance, needs assessment purposes and provision of services. This document serves as my consent for the release of information.
- I understand that I may revoke this consent at any time, in writing, except to the extent that action has been taken in reliance on it.

**CLIENT RIGHTS and RESPONSIBILITIES:**

I am applying for Utah Ryan White Part B Program services. By signing at the end of this authorization, I state that I have read the Rights and Responsibilities and understand the conditions for my participation.

[Link to Rights and Responsibilities](#)

**SIGNATURE:**

I certify that I have reviewed and understand the Disclosure Consent, Certification of Application Accuracy & Completeness, Authorization to Verify Information, and Client Rights and Responsibilities. I understand that if I have questions or concerns, it is my responsibility to communicate with my Case Management Agency.

Applicant Signature:

Signature Date: 12/14/2020

No Changes

## IX. ELIGIBILITY SUMMARY

The end of the application. This page is the summary of all entries during the eligibility review workflow, so you can see the full picture of the client's application.

### A. Application Summary

The summary page, displays all eligibility categories, with status (eligibility review decision), and comments added for each category (if a comment was entered).

1. **Flag:** Review of the eligibility category. Click on the flag to return to the eligibility review page for the category.
2. **Type:** Eligibility category.
3. **Status:** During eligibility review, the status given for the category.
4. **Comments:** The comments added, if any, for each of the categories.
5. **Other Documents:** If the client uploaded other documents that did not fit into any other category, these documents would be viewable here. Download and review. Make any adjustments to the eligibility subjects, if needed, by clicking the flag next to the subject or the subject in the workflow menu on the right.

The screenshot shows a web application interface for 'Eligibility Determination'. On the left is a sidebar for 'Ryan White Eligibility' with a vertical list of categories: Eligibility Summary (selected), Residency Status, HIV Status, Income Status, Health Insurance Status, Medicaid Status, Certification of Accuracy and Completeness, and Eligibility Summary. The main content area is titled 'Eligibility Summary' and contains a table with the following data:

<input type="checkbox"/>	Type ▲	Status ▲	Comments ▲
<input type="checkbox"/>	Medicaid Status	Medicaid Ineligibility Confirmed	Client stated open for Medicaid on application. However, MMIS search displayed that last eligible was 11/30/20. Client will have to report if Medicaid is reinstated.
<input type="checkbox"/>	Health Insurance	No Other Payer Source Identified	Insurance not available. Unemployed. Spouse is unemployed. Over age 26.
<input type="checkbox"/>	HIV Status (Taking HIV Medications)	Taking Medications	Client was not taking meds, but will start again as soon as approved and able to fill.
<input type="checkbox"/>	Proof Of Income	Under 250% FPL Confirmed	AZI client living with his parents who are supporting him and his family while client looks for work.
<input type="checkbox"/>	Residency Status	Utah Residency Confirmed	POR is current utility bill with client name and address. Client states he lost his wallet and does not have his Drivers License or Stat ID.

At the bottom of the table, there is a section for 'Other Document' with columns for 'Please Describe', 'Upload File', and 'Associated File'.

## B. Eligibility Determination

*Determination if client is eligible or ineligible. Click the radio button next to the decision.*

1. **Eligible:** If client meets all eligibility factors, select Eligible. If insufficient was selected for any of the eligibility factors, you will not be able to select eligible.
  - a. **Eligible Date:** Enter the date client's eligibility will start, or first day of new enrollment period.

The screenshot shows a form titled "Eligibility Determination". It has two main fields: "Eligibility Status:" with two radio buttons, "Eligible" (which is selected) and "Ineligible"; and "Eligible Date:" with a text input field containing "02/01/2021" and a calendar icon to its right.

2. **Ineligible:** If client does not meet all the eligibility factors, select Ineligible.
  - a. **Reason:** Select from dropdown menu reason client is not eligible.
    - i. **Ineligible:** Client does not meet eligibility criteria.
      - Ineligible Reason: (not programed in, this is a future enhancement)
        - Over 500% FPL income limit
        - Not HIV+
        - Signature Expired (over 90 days)
        - Not a Utah Resident
        - Refuses to agree to premium repayment
        - Other
    - ii. **Insufficient:** Application is incomplete and needs more information before an eligibility decision can be made.

The screenshot shows the "Eligibility Determination" form with "Eligibility Status:" set to "Ineligible" (radio button selected) and "Reason:" set to a dropdown menu. The dropdown menu is open, showing options: "-SELECT-", "SELECT-", "Ineligible", and "Insufficient".

3. **Comments:** Comment box for optional comments regarding the eligibility decision. These comments are displayed in the Eligibility History page, and other places displaying eligibility.

The screenshot shows a form titled "UDOH User Details". It has a "Comments:" label followed by a text area containing the text: "Eligible decision notes. Add as needed. If client is Ineligible, list reason. If Insufficient, add comments of what is missing."

This is the place for a brief summary to display that is easy to see without having to research the case or go to the Case Notes. Examples: Special circumstances, items missing or reason insufficient, notes that client may need to do before next recertification, reason ineligible etc.

The screenshots illustrate the ClientTrack interface for viewing a client's eligibility history. The top screenshot shows the 'Client Dashboard' menu with 'Eligibility History' highlighted. The bottom screenshot shows the 'Eligibility History' page with a table of records and a comment circled in red.

Date	Status	Eligible Status	Eligibility Determination Date	Selected Program	Comments
12/7/2020	Closed	Ineligible	12/17/2020		Insufficient POR expired.

## X. ELIGIBILITY PROGRAM SELECTION

This section enrolls the client into the Ryan White Part B Program and enrollment into the sub-program. You will be required to enroll in both. First select the program, enroll in Ryan White, and then enroll into the sub-program.

### A. Programs for Eligible Client

*A list of all programs client is eligible for. Depending on how the application was completed and the eligibility factors selected, will determine what programs will be listed. Only the programs client qualifies for will be displayed.*

1. **Information:** If the client is already enrolled in

2. **Eligible Program(s):** Select the program the client applied for, if eligible, or the appropriate program.
  - a. If the program you were expecting to be in the list is not there:
    - i. Navigate back to the Eligibility Summary page and double check the selections for each eligibility factor.
    - ii. If there are any sections that need to be corrected or double checked, navigate back to the section.
    - iii. Review documents and selections.
    - iv. Make any changes necessary.
    - v. Save. Make sure you save the page if any changes were made.
    - vi. Return to the Eligibility Summary page, so the system can run the rules again, and Save.

**List of Eligible Programs**

---

Eligible Program(s):

- ADAP-I: COBRA
- ADAP-I: COBRA Restricted
- ADAP-I: DPI Regence
- ADAP-I: EB-HIPP
- ADAP-I: EB-HIPP Restricted
- ADAP-I: Group
- ADAP-I: Group Restricted
- ADAP-I: Marketplace
- ADAP-I: Marketplace Restricted
- ADAP-I: Medicare Part D
- ADAP-I: Medicare Part D Restricted
- Supportive Services
- Supportive Services Restricted

#### B. User's Program Selection

1. **Program:** A list of all Ryan White programs. The program selected in the Eligible Program section will auto fill.
2. **Override eligible program:** If there is an approved Exception Request or Memo of Record to override the standard eligible rules, select the program to enroll the client.
  - a. **Warning:** You will receive a warning "Are you sure you want to override the standard eligibility rules?"
    - i. **Yes:** Explanation text box will populate. Mandatory field. Must give reason of override and approval from management. The email that was sent to management and accompanying documentation must be uploaded to the Document Upload page.



- ii. **No:** You will need to refresh your screen (F5 or the refresh button on your web browser address bar). The Program is set back to the program selected under the Eligible Programs. If you do not refresh, you will get an error message “Please address the following: override check is a required field”. You will not be able to advance through the page until you refresh.

### User's Program Selection

---

Program:

- ADAP-I: COBRA
- ADAP-I: COBRA Restricted
- ADAP-I: DPI Regence
- ADAP-I: DPI SelectHealth
- ADAP-I: EB-HIPP
- ADAP-I: EB-HIPP Restricted
- ADAP-I: Group
- ADAP-I: Group Restricted
- ADAP-I: Marketplace
- ADAP-I: Marketplace Restricted
- ADAP-I: Medicaid
- ADAP-I: Medicaid Restricted
- ADAP-I: Medicare Part D
- ADAP-I: Medicare Part D Restricted
- ADAP-M
- ADAP-M Restricted
- Case Management Only
- Supportive Services
- Supportive Services Restricted
- Clear Selection

**Are you sure you want to override the standard eligibility rules?**

overridecheck: \*

Explanation: \*

Reason overriding the program system generated and selecting different program. Exception Request and/or Memo of Record approved by management must be uploaded through Document Upload page.

## XI. PROGRAM ENROLLMENT

This page is to enroll in the overall Ryan White Program and set the enrollment start and end dates.

1. **Enrollment Start Date:** Auto populates the date entered on the Eligibility Determination page.
2. **End Date:** Auto populates the last day of the month 6 months after the Enrollment Start Date with month 1 being the month the start date is in, even if the 1<sup>st</sup> month is not a full month of coverage.

3. **Program:** Auto populates the Program selected from the Eligibility Program Selection page. The Program cannot be changed on this page.
4. **Comments:** Comment box for optional comments to be entered. Examples: Enrollment start date different than signature date or first day of the new enrollment period, end date shortened reason, etc.

**Ryan White Eligibility**

**Program Enrollment**

Enter the Enrollment Date and other data necessary below.

Name: Portal, Paul

Enrollment Start Date: 02/01/2021

End Date: 07/31/2021

Program: ADAP-I; EB-HIPP

Comments: Comment box for optional comments to be entered. Examples: Enrollment start date different than signature date

Eligibility Summary

Residency Status

HIV Status

Income Status

Health Insurance Status

Medicaid Status

Certification of Accuracy and Completeness

Eligibility Summary

Eligible Program Selection

Selected Program Enrollment

## XII. FINISH ELIGIBILITY DETERMINATION

You're done! All required steps have been completed. You have enrolled the client into the Ryan White Program. You will see the green check for each eligibility factor on the application workflow menu.

1. Click the "Finish" button and your workflow will be closed. If you exit out before clicking the Finish button, the application will not be submitted and the workflow will be in your paused workflows.
2. **Client Dashboard:** You will be directed to the client's dashboard.

**Ryan White Eligibility**

You're done!  
All required steps have been completed.

**Finish**  
Close the workflow

Eligibility Summary

Residency Status

HIV Status

Income Status

Health Insurance Status

Medicaid Status

Certification of Accuracy and Completeness

Eligibility Summary

Eligible Program Selection

Selected Program Enrollment

## 6. MINOR CLIENTS

Clients who are under the age of 18 and not legally emancipated, will need their parent's information and signature to submit the application. The application workflow is the same, other than there will be the emancipation questions. If the minor client is not emancipated, parent income and signature will be required.

## 7. CHANGES DURING AN ELIGIBILITY PERIOD

During an eligibility period, a client's life circumstances may change. With changes, there may be a need to change programs, or disenroll before the eligibility period ends. This section takes you through the steps to complete when changes are reported.

### I. ENROLLMENT CHANGE

An Enrollment Change (EC) within an eligibility period from one program to another, is usually due to a change in health insurance coverage; however, there may be other reasons an enrollment change may be needed. To make the change, process the client's file in the following way.

#### A. Request and Documentation

*The change documentation should be uploaded to the client's document files, and case notes added to request the change.*

1. **Email:** Receive the request from the client's case management agency. An email will be sent to the shared Ryan White part B email reporting the change and the request for an enrollment change.
2. **Find Client:** You can find the client from your Home workspace or the client's workspace.
  - a. **Home Workspace:** Click on Enrollment List from the side menu. Search for the client. Click on the action button before client's name, then click Select Client. You will be navigated to the client's workspace.
  - b. **Client Workspace:** Click on Find Client from the side menu. Search for the client, and click on the client's name. You will be navigated to the client's workspace.
3. **Case Notes:** Click on Case Notes from the side menu, and read the case note for the change information.
4. **Documentation:** Click on Document Upload and view new documentation.

#### B. Update Information

*Depending on the change reported, will depend on what ClientTrack pages will need to be updated.*

1. **Health Insurance Assessment:** View the current health insurance status. If the client had a change in health insurance status, check to see that the insurance change has been updated. Verify the new information and update any changes.
2. **Medicaid Search:** View Medicaid status. If the client had a change in Medicaid status, check to see if Medicaid status has been updated. Check MMIS for Medicaid status, if needed.

### C. Change Program

1. **Client Dashboard:** Navigate to the client's dashboard.
  - a. Note: This can also be done from the Client's home workspace and selecting **Enrollments** from the left menu.
2. **Add Enrollment:** Click the action button next to Ryan White, and select Add Enrollment. This opens a workflow.
  - a. If you do not want to make the change, or need to hold off on the change, select Pause or Cancel workflow buttons.
3. **Select Program:** Select the program client is now eligible for.
4. **Program Enrollment:** Enter enrollment dates and comments.
  - a. **Enrollment start date:** The date auto populates today's date, change if needed.
    - i. The current program will auto end the day before the start date of new program.
  - b. **End Date:** Auto populates the last day of the current enrollment period.
  - c. **Comments:** Enter comments about the enrollment change.
  - d. **Save:** Select save to make the change.
  - e. **Finish:** Click Finish to complete the workflow.
  - f. **Client Dashboard:** You will be navigated back to the client dashboard and the previous program will show an end date and be filed in the Previous program section. The new program, will show in the Current program section.

### D. Add Case Notes

1. Select Case Notes
2. Add new case note to address the enrollment change. Follow instruction in [Section 2.III CASE NOTES](#).

## II. CHANGE ELIGIBILITY PERIOD DATES

There may be a need to change the eligibility period start and/or end date from what the system auto sets. Example, during conversion ("Go Live") there will be several pending "paper" applications to be added to ClientTrack before an eligibility determination can be made. The start date of the eligibility period may be before the application is entered into the system. Therefore, when the application is approved, the end date may be too far in advanced and will need to be shortened.

### A. Application

1. **Date Received:** The application was received via email through the shared Ryan White email account [rwp@uath.gov](mailto:rwp@uath.gov) from the client or case management agency. The application is saved in the secure T drive and is logged on the Recert Log spreadsheet.
2. **Eligibility Start Date:** Depending on the client's Ryan White eligibility, the date received may or may not be the start date of the enrollment period.

- a. **Current Eligible Client:** The eligibility start date will be the first day after the current enrollment period's eligibility end date.
  - b. **New or Inactive Client:** The eligibility start date will be the date the application was received.
3. **Eligibility End Date:** The eligibility end date is the last day of the sixth month from the first month of eligibility start date. For example, a client's eligibility start date is February 25<sup>th</sup>, February is the first month and the eligibility end date is July 31<sup>st</sup>.
  4. **Conversion Date:** The date the application is converted into ClientTrack.
  5. **Eligibility Period:** ClientTrack will not allow the eligibility start date to be prior to the conversion date. ClientTrack will auto populate the eligibility end date six months from the conversion date.
  6. **Correction to the Eligibility End Date.** If the client's application is not converted into ClientTrack until the next month after it was originally received, the eligibility end date will need to be corrected. For example, a client's application was received February 25<sup>th</sup> and converted on March 10<sup>th</sup>, the earliest start date will be March 10<sup>th</sup> and then ClientTrack sets the eligibility end date as August 31<sup>st</sup>. The eligibility end date will need to be corrected to July 31<sup>st</sup>.

#### B. Shorten Eligibility Period

*The current eligibility period will need to be shortened to only allow six months of eligibility. Both the Ryan White and the Program enrolled in will need to be shortened.*

1. **Find Client:** You can find the client from your Home workspace or the Client's workspace.
  - a. **Home Workspace:** Click on Enrollment List from the side menu. Search for the client. Click on the action button before client's name, then click Select Client. You will be navigated to the client's workspace.
  - b. **Client Workspace:** Click on Find Client from the side menu. Search for the client, and click on the client's name. You will be navigated to the client's workspace.
2. **Client Dashboard:** Navigate to the client's dashboard.
3. **Program Eligibility Period:** Shorten the program's eligibility period. Always start with the program enrolled in first.
  - a. **Edit Enrollment:** Click the action button next to the program, select "Edit Enrollment", and the Program Enrollment page will populate.
  - b. **End Date:** Enter the new end date.
    - i. If the End Date is in the past, you will be disenrolling the client from the program and will need to select the disenrollment reason.
  - c. **Comments:** Add comments with reason changing the enrollment end date.
  - d. **Save**
4. **Ryan White Eligibility Period:** Shorten the Ryan White eligibility period.

- a. **Edit Enrollment:** Click the action button next to the program, and select Edit Enrollment, and the Program Enrollment page will populate.
- b. **End Date:** Enter the new end date.
  - i. If the End Date is in the past, you will be disenrolling the client from the program and will need to select the disenrollment reason.
- c. **Enrollment Status:** Only change the Enrollment Status if client is requesting a change from one status to another. (i.e. self-attestation to a recertification as also reporting changes.)
- d. **Comments:** Add comments with reason changing the enrollment end date.
- e. **Save**

### C. Add Case Notes

1. Select Case Notes.
2. Add new case note to address the restart eligibility period. Follow instruction in [Section 2.III CASE NOTES](#).

## III. DISENROLLMENT

There are times the client will need to be disenrolled before the end of the eligibility period. When a client requests their case to be closed, moves out of the State of Utah, passes away, or other reasons, you may need to manually disenroll the client from the Program. The clients who do not complete their recertification, will be automatically disenrolled by the system.

### A. Request and Documentation

*The request for disenrollment may come from the client, Benefit Specialist, Case Manager, or other authorized sources. If there is documentation to verify the change or request, it may be uploaded to the client's document files, case notes may be added to request the change. If you receive documentation that has not yet been uploaded, you will need to upload the document to the client's file.*

1. **Request:** Receive the request by email or other sources reporting the change or request to disenroll the client.
2. **Find Client:** You can find the client from your Home workspace or the client's workspace.
  - a. **Home Workspace:** Click on Enrollment List from the side menu. Search for the client. Click on the action button before client's name, then click Select Client. You will be navigated to the client's workspace.
  - b. **Client Workspace:** Click on Find Client from the side menu. Search for the client, and click on the client's name. You will be navigated to the client's workspace.
3. **Case Notes:** Click on Case Notes from the side menu, to see if any case notes have been added.
4. **Document Upload:** Click on Document Upload to view any new documentation.

### B. End Eligibility Period

*The current eligibility period will need to be end dated. Both the Ryan White and the program enrolled in will need to be shortened.*

1. **Client Dashboard:** Navigate to the client's dashboard.
2. **Program Eligibility Period:** End the program's eligibility period. Always start with the program enrolled in first.
  - a. **Edit Enrollment:** Click the action button next to the program, and select Edit Enrollment, and the Program Enrollment page will populate.
  - b. **End Date:** Enter the new end date.
  - c. **ADAP Disenrollment Reason:** If the End Date is in the past, you will be disenrolling the client from the program and will need to select the reason.
    - i. **Deceased:** If client is deceased, Date of Death will populate. Enter in Date of Death.
  - d. **Comments:** Add comments with reason ending enrollment period.
  - e. **Save**
3. **Ryan White Eligibility Period:** End the Ryan White eligibility period.
  - a. **Edit Enrollment:** Click the action button next to the program, and select Edit Enrollment, and the Program Enrollment page will populate.
  - b. **End Date:** Enter the new end date.
  - c. **Enrollment Status:** Select Disenrolled
  - d. **Disenrollment Reason:** Select Disenrollment Reason
    - i. **Deceased:** If client is deceased, Date of Death will populate. Enter in Date of Death.
  - e. **ADAP Disenrollment Reason:** If the End Date is in the past, you will be disenrolling the client from the program and will need to select the reason.
    - i. **Deceased:** If client is deceased, Date of Death will populate. Enter in Date of Death.
  - f. **Comments:** Add comments with reason ending enrollment period.
  - g. **Save**

### C. Add Case Notes

1. Select Case Notes.
2. Add new case note to address the disenrollment. Follow instruction in [Section 2.III CASE NOTES](#).

## IV. CLIENT INFORMATION CHANGES

If client reports changes in their information during an enrollment period, ClientTrack will need to be updated.

### A. Client Information Changes

*When client reports a change in name, gender, marital status, household size, address, demographics, or other identifying information, ClientTrack needs to be updated. Complete the following steps.*

1. **Find Client:** Search for client as outlined in previous sections.
2. **Client History:** From the client's workspace, click on Client Information located in the menu. This displays a history of the client's address, email, phone number, household size, and marital status.
3. **Update Information:** To update any of the information that is in the Client Intake section of the application, click the "Update Information" button located in the upper right corner. You will be guided through the Client Identifying Information, Contact Information and Demographics. You must go through all pages. If there is not any changes to one of the pages, just click next or finish.
  - a. **Client Identifying Information:** Update any changes to the client's name, MRN, SSN, DOB, Gender, Marital Status, Household Size, and Household Members. Click Next.
  - b. **Contact Information:** Update any changes to Phone Number, Email, Permission to text or email, Addresses, or Housing Status.
  - c. **Demographics:** Update any changes to Ethnicity, Race or Sub-Populations.
  - d. **Finish:** Click Finish to save, or Cancel to exit and not save any changes.
4. **Add Case Notes:** Add notes for changes made. Follow instruction in [Section 2.III CASE NOTES](#)

#### B. Health Insurance Changes

*When a client reports a change to health insurance and is not requesting an enrollment change, ClientTrack needs to be updated.*

1. **Find Client:** Search for client as outlined in previous sections
2. **Update Health Insurance:** Complete the steps in [Section 7.I ENROLLMENT CHANGES](#) above to update insurance.
3. **Add Case Notes:** Add notes for changes made. Follow instruction in [Section 2.III CASE NOTES](#)

#### C. Medicaid Changes

*When a client reports changes in their Medicaid status, ClientTrack needs to be updated.*

1. **Find Client:** Search for client as outlined in previous sections.
2. **Update Medicaid Status:** Complete the steps in [Section 7.1 ENROLLMENT CHANGES](#) above to update insurance.
3. **Add Case Notes:** Add notes for changes made. Follow instruction in [Section 2.III CASE NOTES](#)

## 8. Case Review

To research a client's case, view all applications, view eligibility determinations and other navigation, follow the steps listed for each activity.

### I. ELIGIBILITY HISTORY

The Eligibility History page is displayed on the Client Dashboard and the client's eligibility for each program with basic details.

#### A. Eligibility History Table



1. **Action Button:** Click on the action button to see the options for the determination date.
  - a. **Review Eligibility:** Takes you to the Eligibility Summary page. See [Section 5.IX ELIGIBILITY SUMMARY](#) for full details.
  - b. **Go to Application List:** Takes you to the Application List on the users Home workspace.
  - c. **View Case Notes:** Takes you to the client's Case Notes.
2. **Date:** This refers to the application submission date.
3. **Status:** This status refers to the eligibility determination status – In Progress or Completed.
4. **Eligible Status:** Displays the eligibility decision status for the determination date.
5. **Eligibility Determination Date:** Displays the date the eligibility determination was completed.
6. **Selected Program:** Displays the program the eligibility determination was for.
7. **Comments:** Displays the comments that were written on the Program enrollment page.