



**DATE:** December 11, 2013  
**TO:** HIV Care Service Providers  
**FROM:** Tamarra Jones, HIV Planning and Coordination Manager  
**CC:** Marc Meulman, Samuel Monroy, Latanya Mitchell, Raul Sobero, Natalie Silva  
**SUBJECT:** Implementation of Centralized Eligibility

---

Starting January 1, 2014, Orange County will be transitioning to a centralized eligibility screening process for Ryan White and HOPWA-funded<sup>1</sup> services. This process will replace the current eligibility processes conducted by each service provider. Centralized eligibility will allow individuals to be screened at one location (as described below). This process is intended to decrease the burden on clients and service providers to conduct screening biannually and collect eligibility documentation. We understand that this might be an inconvenience especially during the initial implementation phase; however, we strongly feel that the new process will result in improved service coordination, standardize eligibility documentation, and help ensure compliance with federal mandates for eligibility screening.

Based on eligibility location and service needs, individuals will be screened for the following:

- Ryan White and HOPWA<sup>1</sup> service eligibility;
- AIDS Drug Assistance Program (ADAP);
- Office of AIDS-Health Insurance Premium Program (OA-HIPP);
- Medi-Cal;
- Medical Services Initiative (MSI);
- Covered California<sup>2</sup>

Eligibility screening will be conducted by three service providers 1) 17<sup>th</sup> Street Care, 2) AIDS Services Foundation (ASF), and 3) Shanti Orange County (Shanti OC) as follows:

- 17<sup>th</sup> St Care will be conducting the screening for patients who receive medical care at 17<sup>th</sup> Street Care or are on ADAP. In addition, 17<sup>th</sup> Street Care will be the primary location for screening of all other clients with the exceptions listed below:
  - ASF and Shanti OC will conduct screening on ASF and Shanti OC clients, respectively, who **do not** receive medical care at 17<sup>th</sup> Street Care and are not on ADAP.

---

<sup>1</sup> Certain HOPWA categories (i.e., Emergency Financial Assistance for Housing, Transitional Housing) may require separate eligibility screening.

<sup>2</sup> Clients will be screened to identify if they qualify for private insurance; and those clients will be referred to apply or assisted with completing the application. ASF is currently the only Ryan White eligibility screening location that can also enroll individuals in Covered California.

To prepare for implementation of centralized eligibility screening, each provider must develop their own internal policy for eligibility verification and documentation. At minimum, the policy should include the following elements:

- Process for eligibility verification vs. service qualification determination (i.e., review of ARIES or other database or referral). This process should include information on the positions responsible for verification and service qualification determination.
- Process for eligibility documentation (i.e., service note in database and/or client's chart, maintenance of an eligibility database/spreadsheet).
- Process for referring clients to eligibility screening who are not currently eligible to receive services. This process should include how referrals for screening will be documented.
- Process to notify client of 30-day grace period for services.
- Process for providing services to clients who do not complete eligibility screening.
- Process to ensure Ryan White (RW) is not billed for services rendered to ineligible clients. This process should include information about service tracking (i.e., tracking RW vs. non-RW services in provider database) and billing.
- Process for referrals.
- Process for six month eligibility screening verification including distribution/collection of the self-attestation form.

Please prepare and submit your agency's eligibility verification policies and procedures no later than March 3, 2014.

As a reminder, information and frequently asked questions (FAQs) regarding the implementation of centralized eligibility screening can be found on the HIV Planning and Coordination website as follows:

Client FAQs in English: <http://ochealthinfo.com/civicax/filebank/blobdload.aspx?BlobID=30156>  
Client FAQs in Spanish: <http://ochealthinfo.com/civicax/filebank/blobdload.aspx?BlobID=30155>  
Service Provider FAQs: <http://ochealthinfo.com/civicax/filebank/blobdload.aspx?BlobID=30140>

Furthermore, the Service Provider Resource Documents section of the website has various tools for service providers that may assist with eligibility verification and the development of policies and procedures. Information, forms, and templates can be found at the link below and are organized by subject: <http://ochealthinfo.com/phs/about/dcepi/hiv/service/docs>  
Please note that some of the eligibility documents have yet to be updated and uploaded to the website. A separate email will be distributed once information has been finalized and uploaded.

Staff at the office of HIV Planning and Coordination are available to assist with any questions, concerns, or training needs you or your staff have regarding centralized eligibility screening. Please direct those to Sam Monroy at (714) 834-8426 or [SMonroy@ochca.com](mailto:SMonroy@ochca.com).

Implementation of centralized eligibility screening is a daunting task. In collaboration with service providers, the eligibility workgroup, the Quality Management Committee, and consumers, planning has taken nearly a year to complete. We thank everyone for their efforts, input, and dedication to this process; however, work is not complete. Providers are encouraged to contact our office as implementation is rolled out to share any challenges, lessons learned, and successes.