

SIX-MONTH RECERTIFICATION POLICY AND STANDARD OPERATING PROCEDURE

Policy Reference Number: RWPB -02
DHW/DPH Policy Reference: None

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Policy: To maintain eligibility for the Idaho Ryan White Part B Medical Case Management (MCM) and the AIDS Drug Assistance Program (ADAP) services, clients must recertify every six-months (HRSA Policy Clarification Notice - [PCN #13-02](#)). The recertification periods are determined based on the date of a client's initial intake application. Six-month recertifications can be done in person or by mail. All clients must recertify within the month their recertification is due to prevent services from being suspended.

Purpose: To ensure that an individual meets the residency, income, and insurance eligibility requirements of the ADAP and RWPB program.

Scope: This policy applies to all clients receiving medical case management (MCM), IDAGap and/or ADAP medications.

Definitions: Refer to Appendix A: Definitions and Acronyms

Standard Operating Procedure:

Notification Procedure:

1. At least sixty days before the end of the six-month recertification period, the MCM can mail/email/or call the client to remind them of their six-month recertification due date
2. The MCM needs to coordinate the following:
 - 2.1 Send the client a six-month verification form or complete the form with the client over the phone
 - 2.2 Any changes to a client's previously reported status (income change, new insurance/loss of insurance) require a copy of the document to be submitted to the MCM
 - 3.2 Check Medicaid eligibility using the Partner Data Access Portal

Self attestation Procedure

3. Clients can attest at the six-month recertification period in person, via mail/email, or over the phone if there have been any changes to their housing, income, insurance, or household size.
 - 3.1 In person six-month verification forms must be signed by the client
 - 3.2 Six-month verification forms completed over the phone with a MCM must include the MCM signature, at the next in-person service with the client, the client signature should be added to the form and a copy kept in the client's file at MCM agency

CAREWare Data Entry Procedure:

4. The RWPB MCM completes the following updates in CAREWare:

- 4.1 If a client moved, update the Demographic tab with any changes
- 4.2 Add the service 1101 in the Service Tab with the date the six-month recertification was completed
 - a) The following services can be added
 - i. 1500: Face-to-face contact
 - ii. 1600: Collateral Contact
 - iii. 5000: Gas Card/Voucher
- 4.3 Update the Annual Review Tab with the date the six-month recertification was completed for both insurance and income even if there were no changes
- 4.4 Update case notes as needed
5. The Idaho RWPB/ADAP Coordinator or Data Coordinator completes the following updates in CAREWare:
 - 5.1 Add a service in the Service Tab:
 - a) **2** *State office received 6-month recertification* - when the six-month recertification is received
 - b) **2-1** *State office received income verification* – if income is updated and a copy was sent with the recertification
 - 5.2 Check to ensure the MCM updated the Service Tab and Annual Review Tab with the date the six-month recertification form was completed
 - 5.3 Ensure any change in status includes supporting documents
 - 5.4 Update the State Fields Tab in CAREWare to reflect the next year the six-month recertification is due (a recertification received in 2018 will need to have the field updated to 2019)
 - 5.5 Contact the MCM if there are any changes that need to be made in CAREWare or missing paperwork

Paperwork Filing Procedure:

6. A copy of the client's six-month recertification form along with any supporting documents must be kept in the client's file at the MCM agency and the MCM must:
 - 6.1 Securely fax, scan or email a copy of the six-month recertification form and any supporting documents to the state RWPB program
7. A copy of the client's six-month recertification will be kept in the client's file at the state office
8. The state will update the agencies' Excel recertification tracking sheet

Annual Review: This policy will be reviewed annually