Utah Ryan White Part B Program

ClientTrack

Benefit Specialist User Guide

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 **Benefit 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
   b. Live production database 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 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. **Manage Services:** A list of clients, supportive services, and services status.
   d. **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.
   e. **My Submitted issues:** A workspace with the list of issues (problems, questions, or suggestions) you have submitted, and the status of each.
   f. **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, eligibility history, 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 gap 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. **Authorization for Release of Information:** Display the client's history of Authorization of Release of Information forms.
   c. **Case Notes:** Client's case notes history and where you add new case notes.
   d. **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 9.I. for more detail.
      i. **CAREWare Eligibility History** button on the upper right of the page will take you to the Migration Eligibility Dates for the eligibility history from CAREWare, the UDOH eligibility system prior to ClientTrack.
   e. **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.
   f. **Health Insurance Assessments:** Client's Health Insurance coverage history.
   g. **Medicaid Search:** Client's history of Medicaid status client selected during application intake.
   h. **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.

    i.   **Referrals:** List of Supportive Services referrals, status, and results. Add new referrals to services from this page.

    j.   **Services:** List of Supportive Services client has received. Add new Services from this page.

    k.   **Document Upload:** History of all documents uploaded to the client's file with associated date of upload. All documents are viewable.

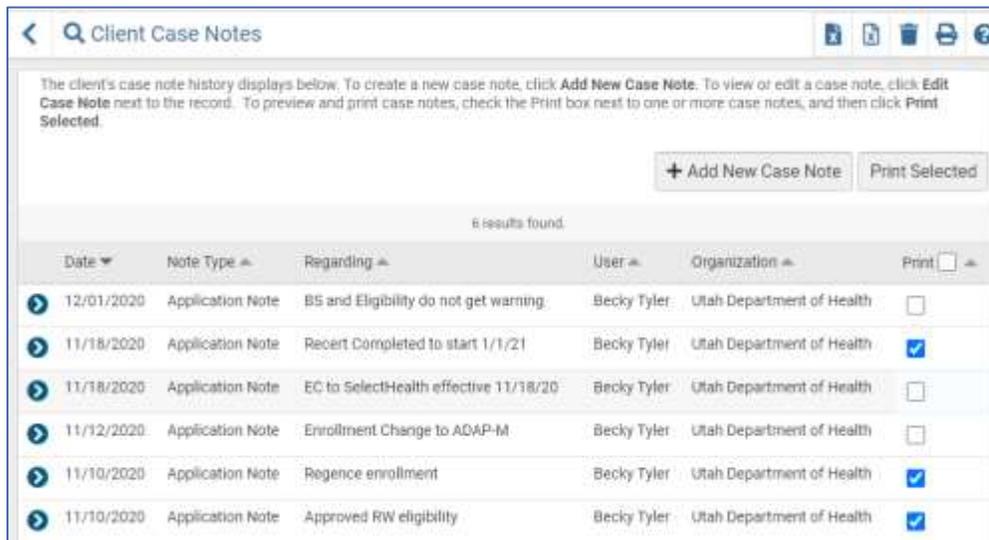   l.   **HIV Status:** History and status of HIV+ data.

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. Benefit Specialists 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.   **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.

        iv.   **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.

2. **Add 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: 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.

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.
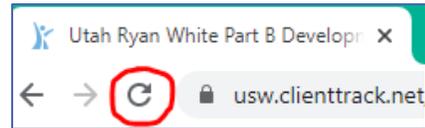
3. HOME WORKSPACE NAVIGATION

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 decending.

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. **Due for 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. **Due for 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 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, 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.

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. **Application 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.

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 one is completed and saved.

1. Depending on the client's situation and how the application is completed, the required fields and pages may populate or be removed throughout the workflow. The workflow may be different for each client.
2. Always start at the top of the page.
3. If you do not have all the information for a section or page, you cannot progress or skip to another page until all the required fields on the page are completed and saved.
4. You can go back to previous pages, but will not be able to skip forward.

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" when you intended to "Select Client".
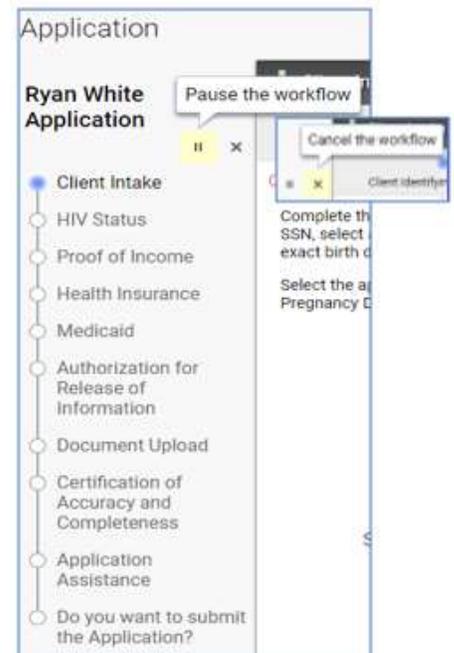
C. Workflow Steps Check List
   To help navigate a workflow, ClientTrack displays the completed, current, and remaining steps within the workflow. These are found at the top of the page and on the left menu.

   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 one of the previous pages in the workflow.
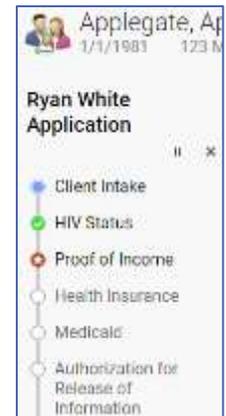
5. APPLICATION INTAKE WORKFLOW

This section takes you through step by step of the Application, Recertification or Self-Attestation. Make sure to have all client information before starting the application.

I. APPLICATIONS, RECERTIFICATIONS, and SELF-ATTESTATIONS

For a client who has not been on the Utah Ryan White Part B program in the past, add a new client and start a new application. For a client who has had a gap in coverage, start a new recertification (application). For clients who are currently enrolled in the Program start the Recertifications and Self-Attestations from the Enrollment List.

A. New Clients or Clients with Gap in Coverage

Always search for client before adding a new client. If the client has been on the Program in the past, do not add a new client.

1. From the Client Workspace (it does not matter which client's dashboard you are currently on), click "Find Client" on the left side menu.
2. Search for the client using multiple criteria search options just in case a number or spelling of name may be different. You do not have to type in the full name or SSN. For example, search the first few letters of name(s), or the last 4 digits of SSN. The more you enter, the narrower your search will be.

   a. Social Security Number and Birth Date
   b. Social Security Number alone
   c. First Name and Last Name with Birth Date
   d. If last name is hyphenated, search variations of last name. First last name alone, second last name alone.
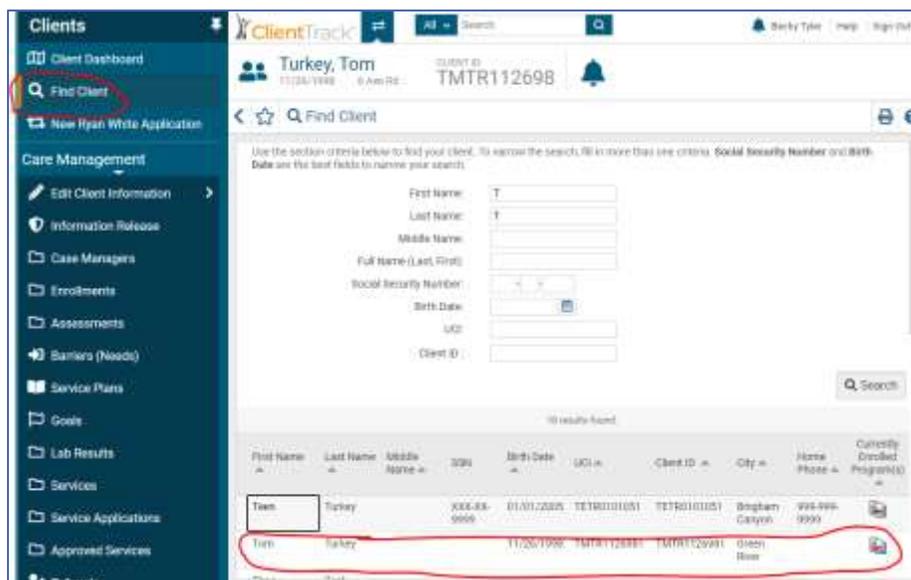
3. If client **is** found:

   a. Check full name, SSN, Birth Date to make sure they all match.
   b. Click anywhere on the client's row.
   c. This will take you to the client's dashboard.
   d. Click "New Ryan White Application" on the left side menu.
   e. Click "Use the current client".
   f. This will start the application client intake.
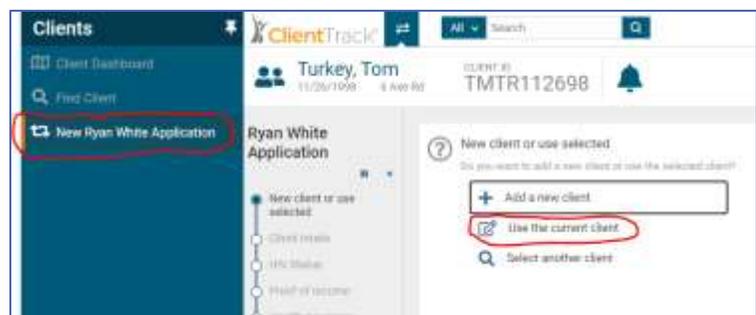
4. If client is **not** found:

    a. Click "New Ryan White Application" on the left side menu.
    b. Click "Add a new client".
    c. This will start the application client intake.
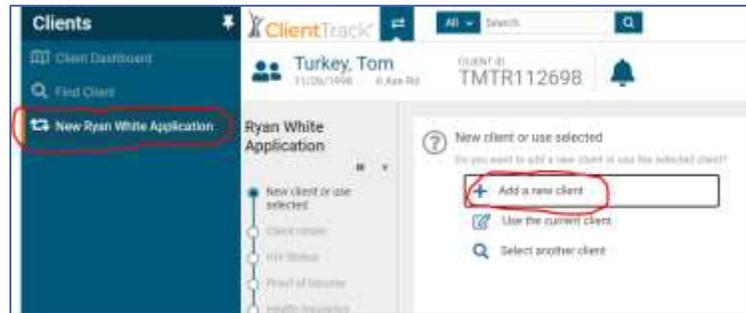
II. CLIENT INTAKE

Client Intake is split into three sections: (A) Client Identifying Information, (B) Contact Information, and (C) Demographics. There is a link to the "Instructions for RWP Application Form" to click and download a pdf of the application instructions. This can be printed or saved to the client file. This must be reviewed with the client and a printed or electronic copy given to each client.

A. Client Identifying Information

1. **Complete all fields**. Red asterisks are required fields. If you do not complete the required fields, and try to go to the next page, you will receive an error that must be addressed before you are able to progress.
2. If you have the information, complete the field even if it is not a required field.
3. **Household Size:** If household size is greater than 1, a household table is populated to enter in name(s), Relationship and age. Do not list the client's name in this table.

B. Contact Information

1. **Preferred Phone Number and Email:** Required fields will change depending on the answer to the question "*Program has permission to text and/or e-mail me*". When the field is:

    a. No – Phone number and email not required.
    b. Text Only – Phone number required.
    c. Email Only – Email required.
    d. Text and Email – Phone number and email required.

2. **Residential Address:** Required street address.
3. **Address 2:** Apartment number or other additional address.
4. **City/County/State/Zip Code:** Required.

    a. ClientTrack uses the United States Postal Services City, County, State and Zip Code programmed behind the scene. Start typing in any one of the fields City, or County, or Zip Code, and a dropdown menu will appear. The more you type, the narrower the search will be.
    b. Click on the client's City/County/Zip Code and the corresponding fields will auto populate.

5. **Has permission to send mail to my address:** Select from dropdown menu:

a. **Yes**: (no further action needed.)
b. **No, send to mailing address**:
    i. **Mailing Address** fields populate, required. Complete same as instructions for residential address.
c. **Do not contact me by mail**: (no further action needed.)

6. **Housing Status:** Select from the dropdown menu.

C. Demographics

Auto Required fields will change depending on the answer to the Ethnicity and Race fileds. Select all that apply. This is only required for new client applications.

1. **Ethnicity:** Select from dropdown menu.
2. **Race:** Select all that apply from dropdown menus.
3. **Sub-Population:** Select all that apply from dropdown menus.

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. Application - 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 uploaded at the end of the application.

1. **Diagnosing Clinician:** Enter name of diagnosing clinician or the provider who completed the form.
2. **Will patient be prescribed ART:** Select Yes or No from the dropdown menu.
3. **HIV Status:** Select from the option.
4. **AIDS Diagnosis:** Select from the options.
5. **HIV+ Test Date (Confirmatory Test):** Enter date or select calendar icon to select date.

    a. If the date the Provider entered on the form is a year only, use January 1 of the year given (01/01/YYYY).
    b. If the date the Provider entered on the form is a month and year, use the 1st day of the month given.

6. **HIV+ Test Date is an Estimated Date:** Check box if estimated date or if only a year or month/year is provided.
7. **HIV+ Diagnosis Date:** Same rules as HIV+ Test Date as listed above.
8. **AIDS Diagnosis Date:** If the client is diagnosed with AIDS, the AIDS Diagnosis Date will populate. Otherwise, this field will not populate.

9. **Risk Factor:** Select all that apply.

B. Recert/SA - Medication Adherence

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

1. **Are you currently taking HIV Medications?** Select from dropdown menu.

   a. **Yes**
   b. No

IV. PROOF OF INCOME

Depending on if the client has income or not, will determine which page will need to be completed. For client's with income, the Proof of Income table is displayed to enter income amounts. 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 request information for both the client and the client's spouse.

1. **Do you (just you, no other household members) receive an income:** If married, will also have a question **Does your spouse receive an income:** Select Yes or No or if married another option I'm separated (I receive no financial support from my spouse)

   a. If Yes, another field will populate:
      i. **Are you/spouse employed:** Yes or No
         - If Yes, another field will populate:
           o **Do you/spouse work 30 hours per week or more?** Yes or No
   b. If I'm separated (I receive no financial support from my spouse), no other questions.
   c. If No (for both client and spouse if married), no more questions and the next page will be the *Affidavit of Zero Income. See section IV below for instructions.*

B. Monthly Income – Applicant/Spouse
   If the above questions "Do you/spouse receive income?" is marked "Yes", the income table will populate for Applicant and/or Spouse. The table(s) needs to be completed for each income type. If no income is received for the income type, enter $0.

   1. **Type:** For each income type that is more than $0.00, complete the following fields on the row:

      a. **Average Income:** Enter the average income client reports for each income type.
      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. 1st and 15th, 5th and 20th, or 15th 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. **Monthly Income:** ClientTrack auto calculates the average monthly income from the data entered. If more than one source, the Monthly Income on the first line will add in and display the total of all sources for the income type.

   i. For example, first job is $10.00/hour * 10 hours/week * 4.3 weeks/month= $433.33 will show for the Monthly Income. Second job, $1,000.00/month so $1,000.00 will show for the Monthly Income on the second row. The Monthly Income amount on the first row, will change from $433.33 to $1,433.33 which is the total Monthly Income of both income sources for the Type of income.

  e. **Comment:** Optional text box to enter comments (e.g. employer name, company, agency etc.) for the Eligibility Specialist to be aware of.

  f. **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.

2. **Applicant's Total Monthly Income:** ClientTrack will add all sources and populate the total amount.
3. **Income Documentation:** A list of documents needed to provide proof of income is listed.
4. **Do you have documentation to verify your Household income amount(s)?** Yes or No
5. **Monthly Income – Spouse** (if married and spouse receives income): Repeat the same steps above for Monthly Income – Applicant.
6. **Total Monthly Household Income:** ClientTrack will add all income sources (applicant and spouse, if applicable) and display the Total Monthly Household Income.

C. Affidavit of Zero Income

If the client and spouse if applicable, report no income, the Affidavit of Zero Income will populate after saving the Proof of Income page.

1. Enter monthly income amount of each type of income. Complete the income amount (enter zero "0" for none) for each source.
2. If there is an amount other than zero, you will get the error message: "You have indicated your income is greater than zero. Please go back and report your household income".

    a. You will be unable to progress to the next page until you navigate back to the Proof of Income screen.
    b. Change the question "Do you receive and income" to "Yes" and follow steps in the Proof of Income section above. Or
    c. Correct the income amount to zero $0.

3. Client must check the box that states "I hereby attest that my household is not currently receiving or expecting to receive any of the income types listed above."
4. How do you pay for your financial obligations? Mandatory text box.

V. HEALTH INSURANCE

This section addresses vigorous pursuit for other payor sources the client may be enrolled in or have access to. The Program must be the payor of last resort. Depending on if the client has another payor source or not, will depend on which page will need to be completed.

A. Health Insurance Question

Do you have health insurance through an employer, COBRA, spouse, partner, parent, Medicare or Marketplace? This is not asking for Medicaid coverage. Medicaid is addressed in the next section.

1. **No:** Select No from the dropdown menu.

    a. **Save:** Click the Save button and you will be directed to the No Health Insurance page.

2. **Yes:** Select Yes from the dropdown menu. Only select if the insurance is <u>currently active</u>. If insurance has been applied for or pending enrollment, do not add. When the insurance becomes active, report it as a change with all plan detail.

    a. **Add New Health Insurance Type** button will populate in the upper right corner. Click button to be directed to insurance detail page. Skip to section C below for instructions.

B. No Health Insurance Coverage

Provide answers for not having health insurance coverage.

1. **No Health Insurance – Uninsured:** Select reason from dropdown box. Depending on reason, more questions may be populated with dropdown box(es) to select from. If reason is "Other" documentation required to upload in the Document Upload section.
2. **No Health Insurance – Employer:** Select reason from dropdown box. Depending on reason, more questions may be populated with dropdown box(es) to select from. If reason is "Other" documentation required to upload in the Document Upload section.
3. **No Health Insurance – Spouse:** Select reason from dropdown box. Depending on reason, more questions may be populated with dropdown box(es) to select from. If reason is "Other" documentation required to upload in the Document Upload section.
4. **No Health Insurance – Parent:** Select reason from dropdown box. Depending on reason, more questions may be populated with dropdown box(es) to select from. If reason is "Other" documentation required to upload in the Document Upload section.

C. Health Insurance Coverage

After clicking the "Add New Health Insurance Type" button, the plan detail page will open. <u>Only add for active insurance</u>. Complete the coverage detail page. If more than one insurance type, add each type separately. (i.e. if have Medicare A/B/D, complete one page with Medicare A/B and another for Medicare D.)

1. **Type of Health Insurance Coverage:** Select from the dropdown menu. If Medicare plan:

    a. **Medicare Status:** Select from the dropdown menu.
    b. **Medicare Beneficiary ID:** Enter ID number.

2. **Effective Dates:** Enter the start and end dates. If you do not know the exact start date, enter the first day of the month. If you do not know the exact end date, or if you do not have one, enter the last day of the plan year.
3. **Next Open Enrollment Date:** If you do not know the exact date, enter the first day of the month.
4. **Status:** Select Active from dropdown menu. (Only enter active insurance.)
5. **Insurance Provider:** Text box to enter in the insurance company.
6. **Plan Name:** Text box to enter in the plan name.
7. **Policy Holder:** Enter the name of the policy holder.
8. **High Risk Pool:** Select from dropdown menu.
9. **HIV Provider In-Network:** Select from dropdown menu.
10. **Access to HIV Medications:** Select from dropdown menu.
11. **Out of Pocket Maximum:** Enter in amount.
12. **Select One:** Select if the Out of Pocket Maximum is an **Individual** or **Family** amount.
13. **Amount Contributed to Out of Pocket Maximum:** Enter amount.
14. **Save**
15. **If more than one insurance, repeat above steps for each.**

VI. MEDICAID

Current Medicaid status must be provided.

A. What Is Your Medicaid Status?

1. **Yes, I am enrolled:** Enter Medicaid ID Number and Medicaid Health Plan, if known.
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:** Enter Application Submission Date.
      ii. **No:** No other questions.

4. **No, I have not applied:** Select all reason(s) from dropdown box.

VII. AUTHORIZATION FOR RELEASE OF INFORMATION

Client must select to give/not give the Program authorization to release information to individuals they list by completing the form. I hereby authorize the Utah Ryan White Part B Program to release information to the following individual(s):

A. Authorize

1. Information box is populated to enter who the client is giving permission to. Complete the authorization information.

   a. **Type:** Select from dropdown box
   b. **Relationship:** Select from dropdown box
   c. **Name:** Type in the full name who you are authorizing to release information to.
   d. **Aware of Client Situation**: Is the individual aware the client is HIV + and applying for Ryan White funding: Yes, No, Unknown.
   e. **Optional information:** Phone, Address, City, State, Zip, email

B. Not Applicable

1. The client does not give authorization to anyone.

C. Authorization Agreement

1. **Agreement:** The client must read the statement on the page.
2. **I agree:** The client must check the I agree box certifying they understand the agreement, even if they select Not Applicable.

VIII. DOCUMENT UPLOAD

The Document Upload page is separated by category for uploading supporting document for eligibility determination. Multiple documents for each category can be uploaded separately.

A. Required Documents

Each application and recertification must have Proof of Residency, and Proof of Income (if zero income, the Affidavit of Zero Income completed in the income section is the POI). For new applicationations, HIV Status is also required. Other documents may be required depending on the client's situation and how the application was completed.

1. Proof of Residency
2. HIV Status
3. Proof of Income
4. Health Insurance
5. Other Document

B. Upload Requirements

Documents can be any type of file – pdf, doc, pic, jpeg, etc.

1. **Document Type Selection:** Under each category, select the document type from the dropdown list.

   a. **Upload File:** Click "Choose File" which will pull up your computer files to select from. Select file, click open, or double click the file name.
   b. **Other Document:** When uploading document that is not in the categories listed, select Other Document.
      i. **Please Describe**: text box will populate. Add description of what the document includes.

2. **Remove Document:** If a file is uploaded by mistake that you do not want to keep as part of the application, you can click the Undo changes icon ↱ to remove before you click save.
3. **Save:** Before documents will be fully uploaded, you must save. If you pause or end the workflow before saving this page, the documents will not be saved to the client's file.

IX. CERTIFICATION OF ACCURACY AND COMPLETENESS

Legal language, consent, and client signature.

A. Legal Language

The client must read the document and understand the legalities to be able to receive Ryan White Part B Program assistance. The document is separated in the following sections:

1. Certificate of Application Accuracy & Completeness
2. Authorization to Verify Information

3. Update Information and Communication
4. Disclosure Consent
5. Client Rights and Responsibilities

   a. **Link to Rights and Responsibilitie**s: There is a link provided for client to click on to provide the Rights and Responsibilities. The client's signature is stating that they have read and understands the conditions for participation. This link opens a separate window which can be downloaded and saved, or printed for the client records.

+ Certification of Accuracy and Completeness

CERTIFICATION OF APPLICATION ACCURACY & COMPLETENESS:

- I certify that all information contained within and submitted with this application is true, correct, and complete to the best of my knowledge.
- I understand I am required to supply all information needed to determine my enrollment and verify my true circumstances.
- I understand that cooperation includes completion and execution of all required forms and releases.
- I understand that failure to cooperate or provide correct information may lead to delays, denial, and/or termination of services.
- I understand that the Utah Ryan White Part B Program cannot pay for services that have been paid or can reasonably be paid by any State, Federal, or private entity that provides health benefits.
- I understand that providing false information may disqualify me from Utah Ryan White Part B Program services.

18 USC 1001 provides, among other things, that whoever knowingly and willfully makes or uses a document or writing containing any false, fictitious, or fraudulent statement of entry, in any manner within the jurisdiction of any department or agency of the United States, shall be fined not more than $10,000, imprisoned for not more than five years, or both.

AUTHORIZATION TO VERIFY INFORMATION:

- I understand that all information may be verified by the Utah Ryan White Part B Program, which is administered by the Utah Departmen...

UPDATE INFORMATIO

- I understand it i immediately inf
  - Health
  - Income
  - Health in:
  - Residenc
  - Marital st
  - Househol
  - Housing
- I understand it i:

Link to Rights and Responsibilities

+ Rights and Responsibilities

Client and Utah Ryan White Part B Program Rights and Responsibilities:
Clients accessing any Utah Ryan White Part B Program (Program) service:

As a client of the Program, you have the *right*:

- To be treated with respect, dignity, consideration, and compassion.
- To receive services free of discrimination on the basis of race, color, ethnicity, national origin, sex, gender identity, sexual orientation, religion, age, class, physical or mental ability.
- To receive information in terms and language that you can understand and is culturally appropriate.
- To reach an agreement with your case manager to set an intake assessment and identify the frequency of contact you will have, either in person or over the phone.
- To withdraw your voluntary consent to participate in Case Management services without affecting your medical care or other services for which you are enrolled.
- To be informed about services and options available to you, including the cost.
- To the assurance of confidentiality of all personal information, communication and records.
- To not be subjected to physical, sexual, verbal and/or emotional abuse or threats.
- To file a grievance about services you are receiving or denial of services according to the Case Management Agency's grievance policy.

As a client of the Program, you have the *responsibility*:

- To treat other clients, volunteers, and staff with respect and courtesy.
- To protect the confidentiality of other clients you encounter.
- To be free of alcohol or mind-altering drugs while receiving Program services or when on the phone with a

B. Signature and Date

1. Client signs electronically using mouse or touch screen.
2. Signature Date is auto populated as the day signing. This cannot be changed.

3. If unable to get a client to complete the signature on their own, to align with the temporary COVID-19 Response policy, the user that helps the client complete the application will enter an "X" as the signature. This must be accompanied with the supporting documents, which will be uploaded in the Document Upload page under the "Other" category and enter "Client Signature" in the "Please Describe" text box.

X. APPLICATION ASSISTANCE

This section is to be completed by the person who is assisting the applicant.

A. Application Details

Complete the section to give details about the client, what program they are applying for, expedited requests, and comments.

1. **Application Assistance Provided by:** Auto populated with the user signed in.
2. **Organization:** Auto populated to the organization associated with the user signed in.
3. **Program Applying for:** Select from dropdown box the program client is applying for.
4. **Application Reason:** Select all that apply. Only appears on the new application for new clients who have not been on the Utah Ryan White Program in the past.
5. **Request to Expedite Date:** If requesting the application to be expedited, enter the date requesting a decision by.

a. **Request Comment:** Text box to enter reason application is needed to be expedited. This box will only populate if expedited date is entered. Supporting documentation should be uploaded in the Document Upload screen under the "Other" category.

6. **Contact Information for Follow-up:** Text box required to enter notes of who to contact if there are any questions or follow-up information to let UDOH eligibility specialist know about. You can also add additional comments for UDOH staff.

XI. SUBMIT APPLICATION

The end of the application. At this point, you either submit application, or if you are not ready, you can save the application as a draft and submit at a later time. There is not a save button at the bottom of the page, selecting Yes or No and then Finish will save the application. You will also see the green check for each eligibility factor on the application workflow menu.

A. Do you want to submit the application to UDOH?

1. **Yes:** Submit the application to UDOH which will complete it and it cannot be edited. UDOH Eligibility Specialist will receive the application and it will be pending until a decision can be made.

   a. **You're done!** Page will populate.
   b. **Finish:** 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.
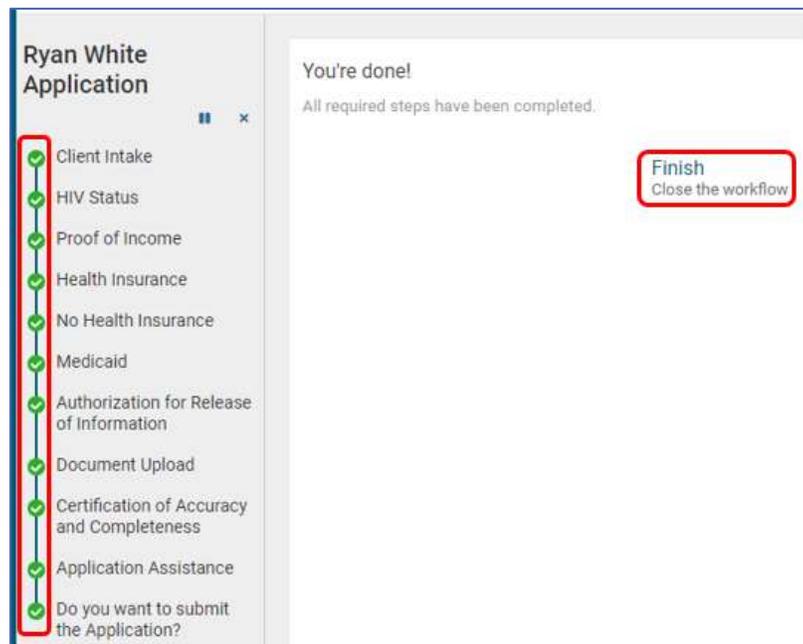
    c. **Client Dashbord:** You will be directed to the client's dashboard.
    d. **Application Submited:** No further action needed, as the application is now waiting an eligibility decision.

2. **No:** Application is saved as a draft and can be edited. UDOH Eligibility Specialist will not receive the application, cannot access file, or make a determination.

    a. **You're done!** Page will populate.
    b. **Finish:** Click the "Finish" button and your workflow will be closed. If you exit out before clicking the Finish button, the application will be in your paused workflows.
    c. **Client Dashbord:** You will be directed to the client's dashboard.
    d. **Application Saved as Draft:** The application has not been submitted. It is saved in the *Application List* as a draft until it is completed and submitted.

B. Case Notes
    Add any notes that pertain to the client's application or situation.

1. After submitting or pending the application, ClientTrack directs you to the Client Dashboard in the Clients Workspace.
2. Select Case Notes from the Menu bar.
3. Add New Case Note by following instructions in Section 2.III above.

XII. PENDING DRAFT APPLICATION

An application that has been started, but not submitted, will be stored as a *Draft* in the *Application List* until it is completed and submitted.

A. Application List

The Application List displays all applications that are pending. To find the pending draft application complete the following steps:

1. Navigate to your user HOME Workspace.
2. Select Application List.
3. **Application Status:** Check *Draft*. If you want to narrow the search further, enter other search criteria. See Application List section 3.II above for more detail.
4. Click Search.
5. Find client.
6. **Action Button:** Click on the blue arrow next to your client, and a dropdown box will populate. Click *View Application/Recertification/Self Attestation*:

   a. **View Application/Recertification/Self Attestation:** Start the application workflow again. All the information entered before will populate. You will be navigated through each page.
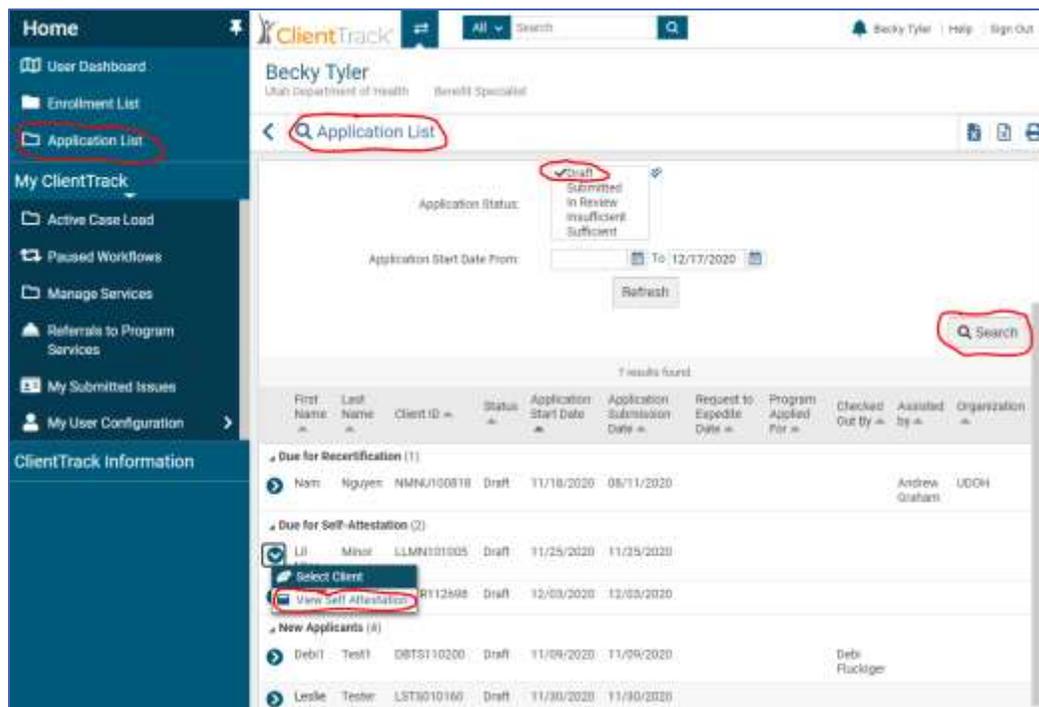
B. Completing a Pending Draft Application

1. **View Application:** From the Application List, find client you wish to continue and complete the application. Select View Application which will start the application workflow again. All the information entered before will populate. You will be navigated through each page.
2. Edit and complete each page verifying information is correct. Select one of the following options to continue through the application.

   a. **Next:** Appears on the *Client Intake* (3 pages) Workflow. Clicking *Next* takes you to the next page within the *Client Intake* pages.

b. **Previous:** Appears on the *Client Intake* (3 pages) Workflow. Clicking *Previous* takes you to the previous page within the *Client Intake* pages.

c. **No Changes:** If there are no changes to be made on the page, clicking *No Changes* skips to the next page.

d. **Finish:** Saves all changes and continues to the next page.

e. **Save:** Save all and continue to next page.

3. **Submit Application:** Continue through all pages until able to complete and submit the application.

C. Case Notes

Add any notes that pertain to the client's application or situation

1. After submitting or pending the application, ClientTrack directs you to the Client Dashboard in the Clients Workspace.

2. Select Case Notes from the Menu bar.

3. Add New Case Note by following instructions in above.

## 6. INSUFFICIENT APPLICATIONS

Applications that have been reviewed by an Eligibility Specialist and have been determined incomplete, will be stored as *Insufficient* in the *Application List* until it is completed and submitted.

A. Application List

The Application List displays all applications that are pending. To find the insufficient application complete the following steps:

1. Navigate to your user HOME Workspace.
2. Select *Application List*.
3. **Application Status:** Check *Insufficient*. If you want to narrow the search further, enter other search criteria. See Application List section 3.II above for more detail.
4. Click Search.
5. Find client to complete the application.
6. **Action Button:** Click on the blue arrow next to your client, and a dropdown box will populate. Click *Select Client.*

    a. **Select Client:** Navigate to the client's dashboard.
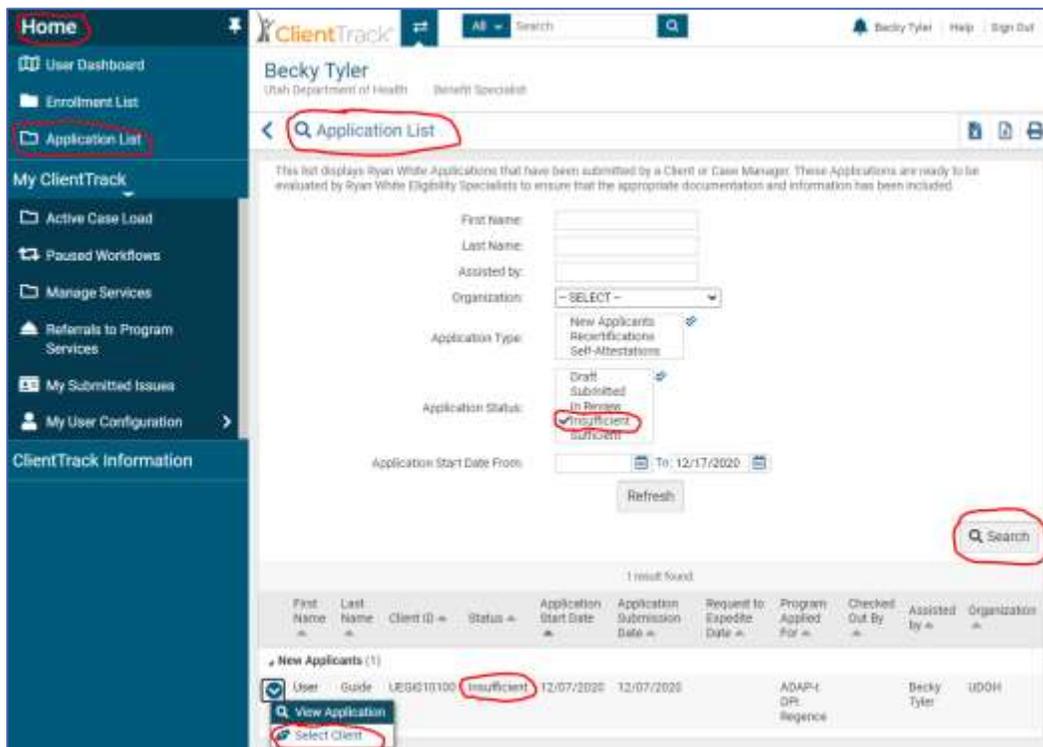
7. **Case Notes:** Read the case note that the Eligibility Specialist left to find out what is making the application insufficient and what is needed to make it complete.

    a. **Client Information Menu:** From the Client Dashboard, click *Case Notes.*

b. **Action Button:** Find the not regarding insufficient application. Click the button and click *View Case Note*.

B. Completing an Insufficient Application

After identifying why the application was marked insufficient, gather what is needed and complete the application.

1. **View Application:** From the Application List, find client you wish to continue and complete the application. Select View Application which will start the application workflow again. All the information entered before will populate. You will be navigated through each page.

2. **Edit and complete** each page verifying information is correct. Select one of the following options to continue through the application.

   a. **Next:** Appears on the *Client Intake* (3 pages) Workflow. Clicking *Next* takes you to the next page within the *Client Intake* pages.

   b. **Previous:** Appears on the *Client Intake* (3 pages) Workflow. Clicking *Previous* takes you to the previous page within the *Client Intake* pages.

   c. **No Changes:** If there are no changes to be made on the page, clicking *No Changes* skips to the next page.

   d. **Finish:** Saves all changes and continues to the next page.

  e. **Save:** Save all and continue to next page.

 3. **Submit application:** Continue through all pages until able to complete and submit the application.

C. Case Notes

Add any notes that pertain to the client's application or situation

 1. After submitting or pending the application, ClientTrack directs you to the Client Dashboard in the Clients Workspace.

 2. Select Case Notes from the Menu bar.

 3. Add New Case Note by following instructions in Section 2.III above.

D. Flowchart of Application Workflow
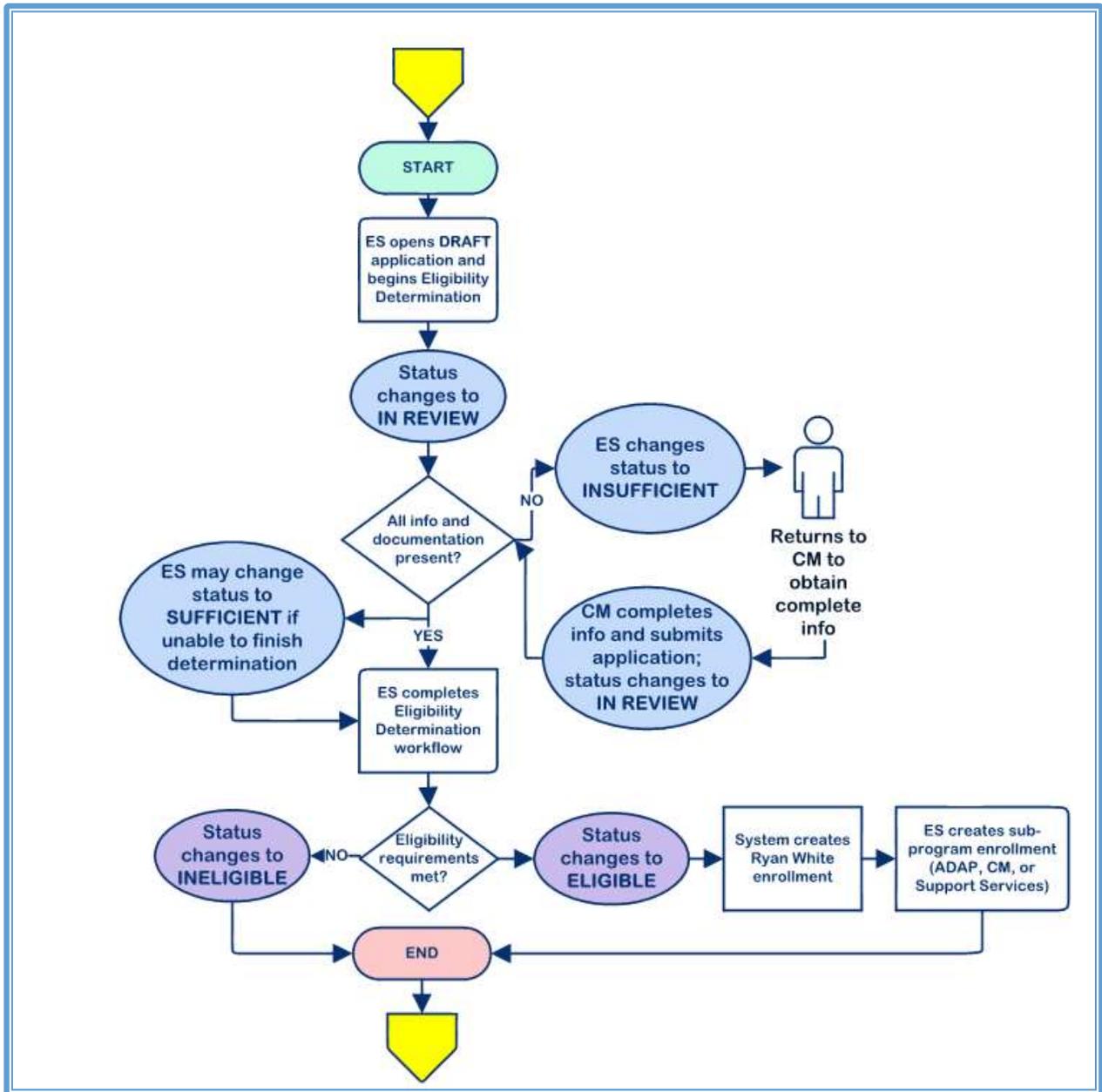
7. MINOR CLIENTS

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.

8. 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 for reporting changes the client has had during their enrollment period, and to request a change in their enrollment as needed.

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 report the change and request an Enrollment Change, complete the following steps.

A. Documentation Upload

Gather the documentation needed. Depending on what change is being made, will determine the documentation needed. Once all documentation is received, complete the following steps to upload it to ClientTrack.

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. **Upload Documentation:** Upload the documents received to verify why the enrollment change is being requested (i.e. health insurance card, Insurance termination verification, etc.)

    a. **Document Upload:** From the client's workspace , click on Document Upload in the left menu.
    b. **Add New File:** Click on the Add New File button in the upper right corner.
        i. **Document Checklist:** Select the category of document.
        ii. **Item Requiring Verification:** Select the type of document.
        iii. **Comments:** Add comments for document that was uploaded.
        iv. **Upload File:** Click on Choose File. Select the document from your saved files on your computer, or click on the camera to take a picture and upload.
        v. **Save**

B. Update Information

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

1. **Health Insurance Assessment:** If the client had a change in health insurance status, click on Health Insurance Assessments on the menu options on Clients workspace.

    a. **New Insurance:** For insurance plans that are new and active add the insurance plan details. The insurance has to be active before you can add it. Do not enter insurance that has been applied for or pending the effective date.

        i. **Add New Insurance Assessment:** Click on the "Add New Insurance Assessment" button. This will take you to the Health Insurance page that is the same as client intake for an application, recertification and self-attestations.

        ii. **Do you have health insurance…** : Select "Yes".

        iii. **Add New Health Insurance Type:** Click "Add New Health Insurance Type" button, and follow instructions listed in Section 5.V HEALTH INSURANCE above to add all the plan details.

        iv. **Save:** Click the save button. This will take you back to the Health Insurance Assessments page and you should see the new insurance is now listed.

    b. **Terminated Insurance:** Insurance plans that are no longer active will need the insurance status changed.

        i. **Edit Insurance Assessment:** Click on the edit icon for the insurance that is being updated. This will take you to the Health Insurance page that is the same as client intake for an application, recertification and self-attestations.

        ii. **Actions for (Insurance Type):** Click on the action button for the insurance that is no longer active.

        iii. **View/Update Insurance Source:** Click on View/Update Insurance Source. This will take you to the plan details page.

        iv. **Update:** Make the changes on the insurance details.

            • **Effect Dates:** Update the last day the insurance was active.

            • **Status:** Select "Not Active"

            • **Save:** This will take you back to the Health Insurance page.

        v. **Save:** Click the save button. This will take you back to the Health Insurance Assessments page and you should see the Health Insurance Status is now listed.

2. **Medicaid:** If the client has a change in their Medicaid status, you will need to update the Medicaid status.

    a. **Medicaid Search:** From the Client's Workspace, click "Medicaid Search" from the menu. The Medicaid status history will be displayed.

    b. **Add New:** Click the "Add New" button, and follow the instructions listed in Section 5.VI MEDICAID above to update the Medicaid status.

C. Add Case Notes

1. Click on Case Notes
2. Add new case note of what changes are being reported and what program client would like to be enrolled in. Follow instructions in Section 2.III CASE NOTES above.

D. Request Enrollment Change

In order for the enrollment change to take place, you will need to notify UDOH Eligibility Specialists so they can make the change.

1. **Email:** Send an email to rwp@utah.gov to notify UDOH of change and request an enrollment change.

   a. **Subject:** The email subject should include "Enrollment Change" and client's initials or client ID.
   b. **Content:** In the body of the email, give client's name, client ID (if not in the subject line), and note that documentation has been uploaded to ClientTrack for an enrollment change. Identify the program client is requesting to enroll in and effective date.

II. 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 will need to request the client to be disenrolled from the Program. The clients who do not complete their recertification, will be automatically disenrolled by the system.

A. Gather Information

If you receive information that will result in the client no longer being Ryan White Part B eligible, or a request from the client to be removed from the Program before the end of the eligibility period, you will need to report the change and a request the client to be disenrolled.

1. **Information:** Receive the information and any accompanying documentation. This includes, but is not limited to, any communications (phone call, email, text, documents, letters, etc) from the client, case managers, authorized representative, or other creditable sources.
2. **Request:** Send an email to UDOH at rwp@utah.gov to report the change and request the client to be removed from the Program.

B. Documentation Upload

Any documents, emails, letters, ect received will need to be uploaded to ClientTrack. Complete the following steps to upload it to ClientTrack.

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. **Upload Documentation:** Upload the documents received to verify why the enrollment change is being requested (i.e. health insurance card, Insurance termination verification, etc.)

   a. **Document Upload:** From the client's workspace , click on Document Upload in the left menu.
   b. **Add New File:** Click on the Add New File button in the upper right corner.
        i.   **Document Checklist:** Select the category of document.
        ii. **Item Requiring Verification:** Select the type of document.
        iii. **Comments:** Add comments for document that was uploaded.
        iv. **Upload File:** Click on Choose File. Select the document from your saved files on your computer, or click on the camera to take a picture and upload.
        v.   **Save**

C. Add Case Notes

   1. Click on Case Notes.
   2. Add new case note of what changes are being reported and reason requesting disenrollment. Follow instructions in Section 2.III CASE NOTES above.

D. Request Disenrollment
   In order for the disenrollment to take place, you will need to notify UDOH Eligibility Specialists so they can make the change.

   1. **Email:** Send an email to rwp@utah.gov to notify UDOH of change and request an enrollment change.

      a. **Subject:** The email subject should include "Disenrollment" and client's initials or client ID.
      b. **Content:** In the body of the email, give client's name, client ID (if not in the subject line), and note that any documentation received has been uploaded to ClientTrack for disenrollment.

III. 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 instructions in Section 2.III CASE NOTES
5. **Email UDOH:** If any changes effect eligibility or services, email UDOH of changes made.

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 8.1 ENROLLMENT CHANGES above to update insurance.
3. **Add Case Notes:** Add notes for changes made. Follow instructions in Section 2.III CASE NOTES
4. **Email UDOH:** If any changes effect eligibility or services, email UDOH of changes made.

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 8.1 ENROLLMENT CHANGES above to update insurance.
3. **Add Case Notes:** Add notes for changes made. Follow instructions in Section 2.III CASE NOTES
4. **Email UDOH:** If any changes effect eligibility or services, email UDOH of changes made.

9. 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 displays 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. The summary page, displays all eligibility categories, with status (eligibility review decision), and comments added for each category (if a comment was entered).
   i. **Eligibility Summary Table:**
      - **Flag:** Review of the eligibility category. Click on the flag to go to the eligibility review page for the category.
      - **Type:** Eligibility category.
      - **Status:** During eligibility review, the status given for the category.
      - **Comments:** The comments added, if any, for each of the categories.
   ii. **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.
   iii. **Eligibility Determination:** Displays the decision made and the start date of the eligibility period.
   iv. **UDOH User Details:** Displays details on the Eligibility Reviewer, date decision was made, comments, and status of the decision.
b. **Go to Application List:** Takes you to the Application List on the users Home workspace.
c. **Edit/View Case Notes:** Takes you to the client's Case Notes.

2. **Eligibility Determination Status:** Displays the eligibility determination status – In Progress or Completed.
3. **Eligible Status:** Displays the eligibility decision status for the determination date.
4. **Eligibility Determination Date:** Displays the date the eligibility determination was completed.
5. **Selected Program:** Displays the program the eligibility determination was for.
6. **Comments:** Displays the comments that were written on the Program enrollment page.