North Carolina Ryan White Electronic Eligibility Solution (NC REEDS) Case Manager Manual, Updated on February 13, 2025

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES
Division of Public Health

Table of Contents

Introduction to NC REEDS

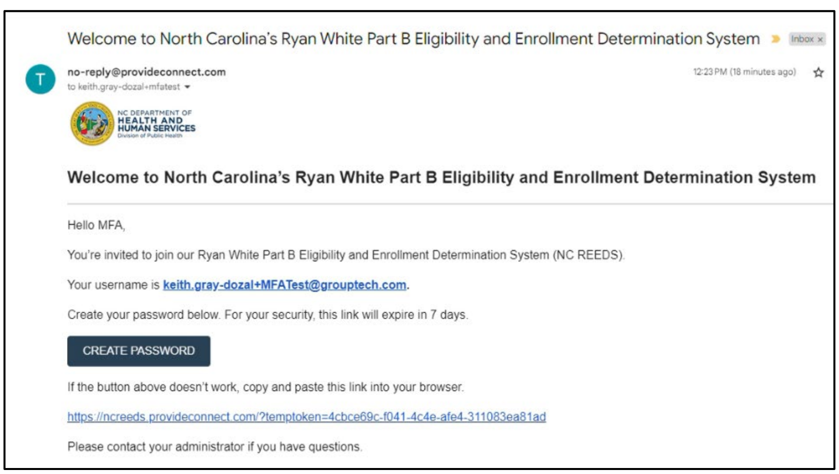
The North Carolina Ryan White Part B Eligibility and Enrollment Determination Solution (NC REEDS) is the online system used to submit, process, and approve all applications for the North Carolina Ryan White Part B Care services program and the HIV Medication Assistance Program (HMAP). This manual provides an overview of how to use NC REEDS for HIV case managers and supporting agencies in North Carolina. This manual is intended to be a resource for case managers to reference when navigating NC REEDS to submit new applications, recertifications, client updates, and troubleshooting common system issues. All example names and data included in this manual are fictitious.

Information on the Ryan White Part B/HMAP program is available in the HMAP Program Manual and will not be fully repeated here. The current version of the HMAP Program Manual can be found on the HMAP website. The NC REEDS manual and HMAP Program Manual are intended to be used in tandem.

Creating an Account in NC REEDS

All agencies that serve Ryan White Part B/HMAP clients received an Agency Onboarding form to submit the names and email addresses of individuals at their agency requiring access to NC REEDS. Any case managers who have not received NC REEDS login information or are new to their agency should reach out to their NC REEDS agency administrator or the Ryan White Part B/HMAP team to receive login credentials. For more information on requesting NC REEDS access, see the Frequently Asked Questions – Account Set-Up section of this manual.

All NC REEDS users receive an automated email with their NC REEDS username and a link to set their account password. All usernames will correspond with the user's work email address. The first time users log in, they will be prompted to set up a multifactor authentication program after setting their password.



Setting Up Multifactor Authentication

All NC REEDS users are required to select a multifactor authentication (MFA) method to link to their NC REEDS account. The MFA serves as an additional security measure for protecting client information.

When NC REEDS users log into their account, they will be prompted to enter a 6-digit numeric code to verify their login attempt. The 6-digit code will be generated on the MFA of the user's choosing after linking the MFA to their NC REEDS account the first time they log in.

NC REEDS users are permitted to choose the MFA method of their preference. The table below provides additional resources for configuring different MFA methods to NC REEDS and recommended MFA apps.

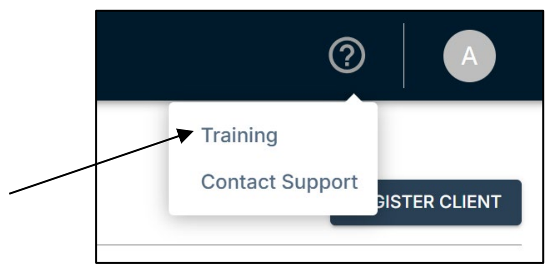
MFA	Description	Relevant Links
Protecc Program	Protecc is a free MFA program available for download onto Windows computers. Protecc is not a phone-based app.	Download Protecc: Protecc - 2FA Authenticator TOTP - Free download and install on Windows | Microsoft Store Recorded tutorial to link Protecc to your NC REEDS account: IL RWB Case Management Training - Module One: Program Overview | Provide Enterprise® by Groupware Technologies
Microsoft Authenticator	Microsoft Authenticator is a free MFA app linked to a Microsoft account (i.e., Outlook email). Microsoft Authenticator is available to download on IOS and Android devices.	Download Microsoft Authenticator for IOS: Download Microsoft Authenticator - Microsoft Support Download Microsoft Authenticator for Android: Download Microsoft Authenticator - Microsoft Support How to link Microsoft Authenticator to NC REEDS account: How to add your accounts to Microsoft Authenticator - Microsoft Support
Duo Mobile	Duo Mobile is a free MFA app available to download on IOS and Android devices. Users create an account with Duo, then link their Duo account to work/personal accounts requiring multifactor authentication.	Download Duo Mobile for IOS: Duo Mobile on the App Store Download Duo Mobile for Android: Duo Mobile - Apps on Google Play How to link Duo Mobile to your NC REEDS account: Third-Party Accounts - Guide

		to Two-Factor Authentication · Duo Security
Google Authenticator	Google Authenticator is a free MFA app linked to a Google account (i.e., Gmail). Google Authenticator is available to download on IOS and Android devices.	Download Google Authenticator for IOS: Google Authenticator on the App Store Download Google Authenticator for Android: Google Authenticator - Apps on Google Play Google Authenticator FAQs: Google Help for 2-Step Verification - Google Account Help

NC REEDS User Guides and Training Videos

In addition to this manual, there are NC REEDS User Guides and recorded case manager training videos available in NC REEDS.

To access these resources, navigate to the Question Mark button in the top right corner of the NC REEDS screen and select Training.



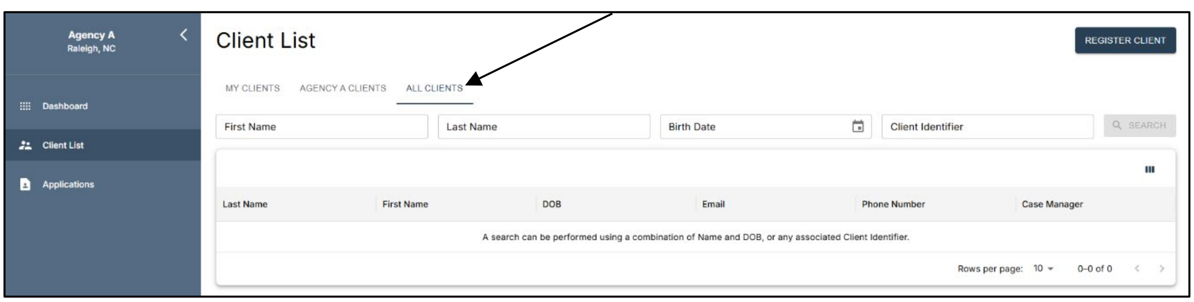
Submitting a New Client Eligibility Application in NC REEDS

The following section describes how to complete the eligibility application for new clients (i.e., clients that are not currently enrolled in HMAP or Ryan White care-only services).

Searching a Client and Checking For an Existing Record

Before starting an eligibility application for a client in NC REEDS, use the NC REEDS client search feature to check whether the client has an existing NC REEDS profile. Avoiding duplicate client profiles in NC REEDS is essential to ensuring there are no delays in medication dispensing or service provision for clients.

- To search for an existing client profile, select the **Client List** tab on the navigation pane.
- The Client List tab contains three subtabs:
    - **My Clients:** Contains a list of all registered clients assigned to the case manager.
    - **My Agency Clients:** Contains a list of all registered clients assigned to the case manager's agency.
    - **All Clients:** Contains a list of all registered clients across all agencies in North Carolina.
- Select the **All Clients** subtab. Search for the client by entering their first name (or at least the first letter), last name (or at least the first letter), and the full date of birth; or enter the client identifier (previously known as Case Number).
- After entering the search criteria, the system will return any clients that match the information entered. If the case manager finds a client profile already exists for the client, the case manager can proceed by opening their existing client profile.
- ***Please Note:*** See the Frequently Asked Questions – Client Applications section of this manual for next steps if a duplicate client profile is found.

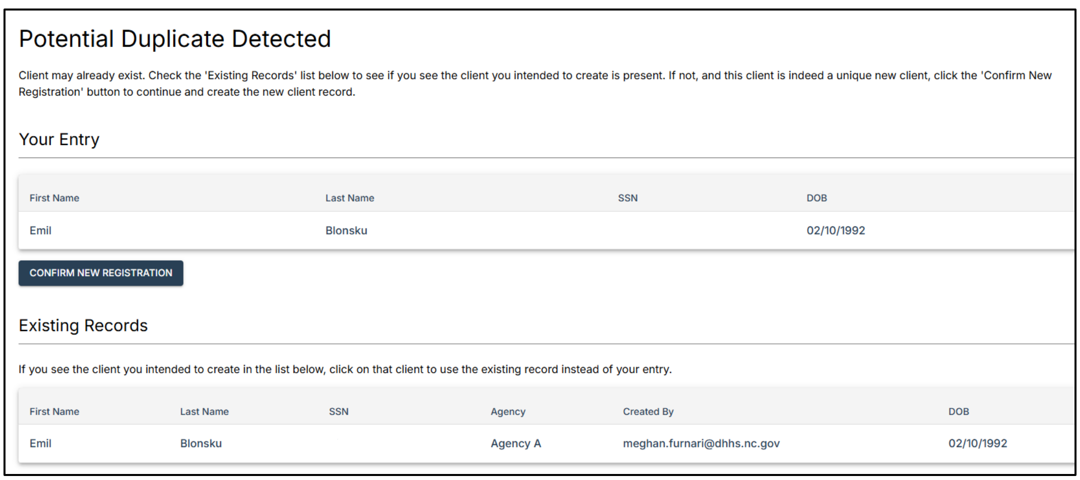


Registering a New Client

- If the case manager does not identify that the client is already in NC REEDS, they can proceed to create a new client profile. To register a new client in NC REEDS, navigate to the Register Client button in the top right corner of the Client List tab.
- In the new client registration page, the case manager must enter all required information to create the client profile. Required fields are designated with an asterisk (*).
- Once all required fields are entered, select the Save button in the top right corner to register the new client.

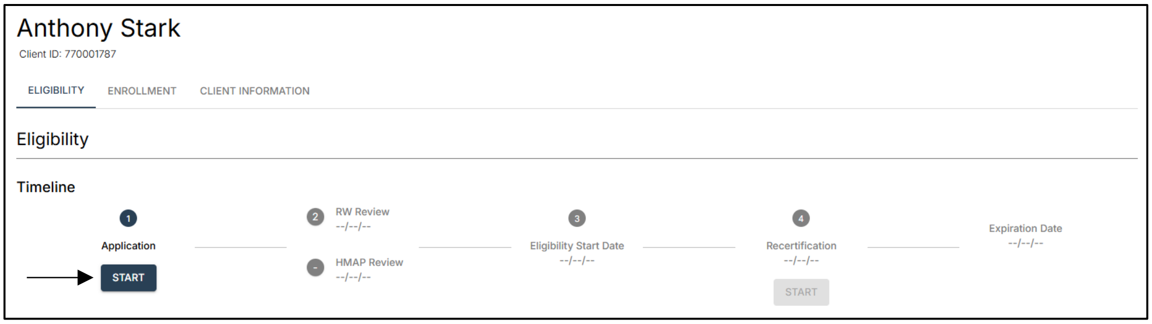
When a Potential Duplicate is Detected

- When a new client profile is created, NC REEDS will search existing client records to check for potential duplicates.
- If a potential duplicate is detected, NC REEDS will alert the case manager with a message indicating the client may already have an existing profile.
- If the case manager determines the potential duplicate profile is match, open the existing record and complete the client's application in the client's existing profile.
- If the case manager determines this is not a duplicate client, proceed creating the new client profile by clicking the Confirm New Registration button.



Starting the Eligibility Application

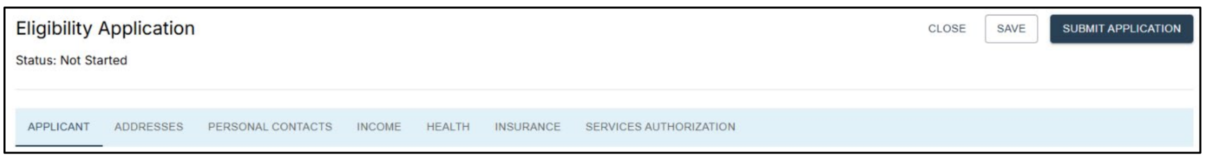
- After registering and saving a new client profile in NC REEDS or after selecting an existing client in NC REEDS, the system will automatically open to the client's eligibility timeline. All client applications will be initiated in the client's eligibility timeline. To begin the application, click the Start button beneath the Application header.



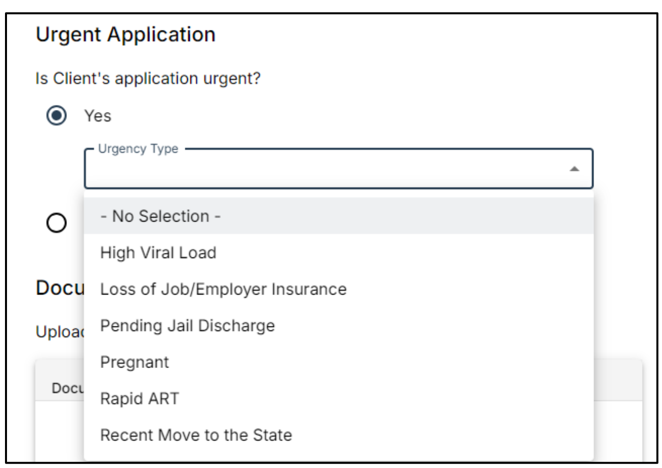
- Case managers can open the client's eligibility timeline at any point by searching the client in the Client List tab and selecting the client's profile from their My Clients subtab. The client can also be located by searching their information in the All Clients tab or My Agency subtab.

Applicant Subtab

- The eligibility application will contain several subtabs for the case manager to complete to determine the client's eligibility for HMAP and/or Ryan White Part B care services.

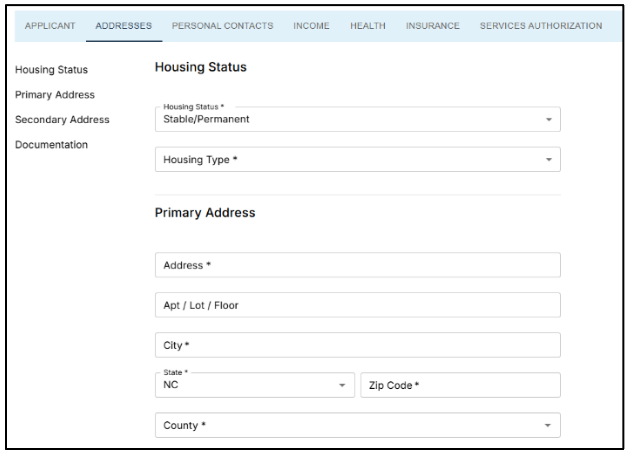


- Once in the eligibility application, NC REEDS will open into the Applicant subtab. Several fields will automatically populate based on the information recorded when the client was registered (e.g., name, date of birth, gender identity).
- Complete all required fields in the applicant subtab.
  - If the client does not have an email address, please add your email to the required Email Address field. Feel free to add a note to the "Communication Notes" field as well.
- The applicant subtab is where a case manager can designate if an applicant is **urgent**. If the case manager indicates the application is urgent, they will be prompted to select a reason why the application is urgent. Indicating a client's application as urgent will move the application to the top of the processors' queue.

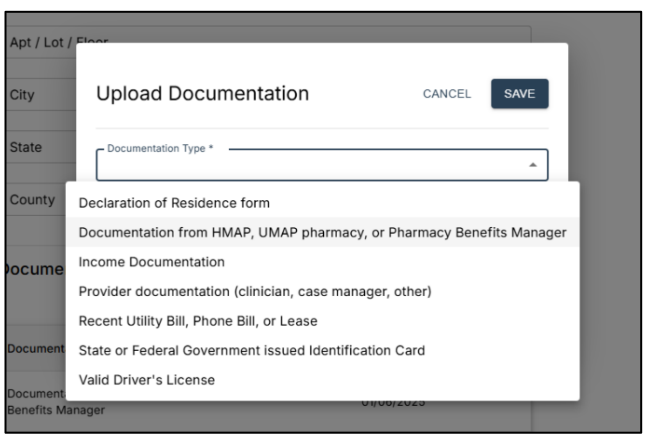


Addresses Subtab

- The Addresses subtab collects information related to the client's housing status, street address, and mailing address.
- Complete all required fields in the addresses subtab.



- Verify that the County selection is accurate. If the county generates incorrectly, use the drop down menu to select the correct county.
- The case manager must provide proof of address documentation and upload the documentation within this subtab. For more information on acceptable documentation for proof of residency, see the HMAP Manual.
- To upload documentation of the client's address, navigate to the bottom of the address subtab and select the Add Documentation button.
- The case manager will be required to select the type of documentation submitted. Once the type of documentation has been entered, the case manager can upload the documentation. NC REEDS accepts PDF, PNG, and JPG files.

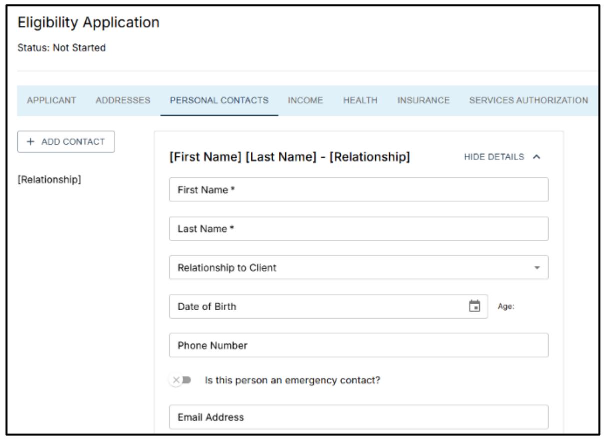


- Once the documentation has been selected, click the Save button.

Personal Contacts Subtab

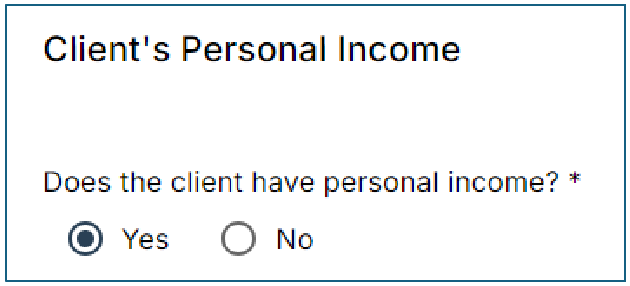
- While personal contact information is not required for submitting an eligibility application, the personal contacts subtab can be used to document any household members, emergency contacts, or other persons the client would like to share as a contact person.

- Case managers can add personal contacts by selecting the Add Contact button on the personal contacts subtab. The case manager will be prompted to enter information including the contact's name, relationship to the client, and emergency contact status.
- ***Please Note:*** If the client is in jail, the Incarceration Interviewer must be added to the Personal Contacts subtab, either by the HMAP Jail team or the Incarceration Interviewer when completing the application.

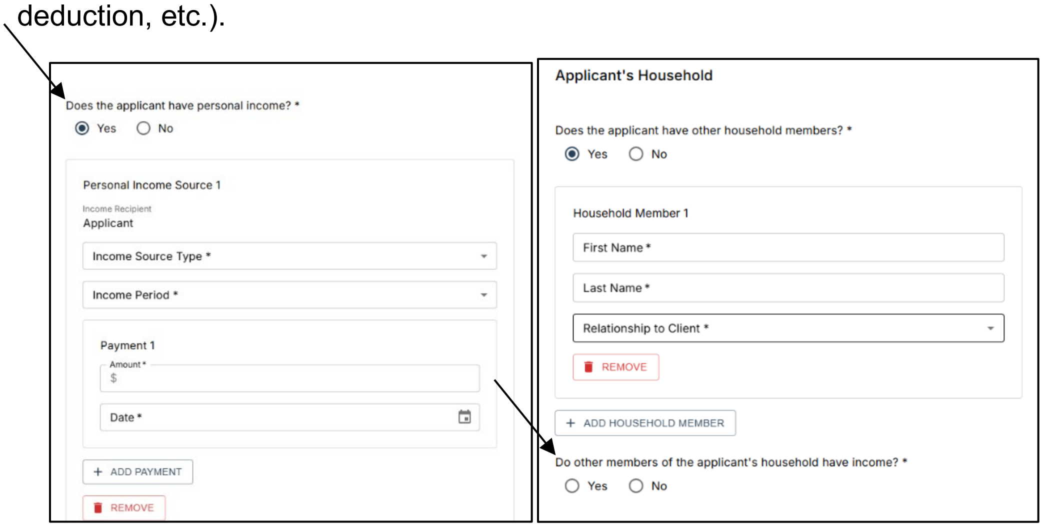


Income Subtab

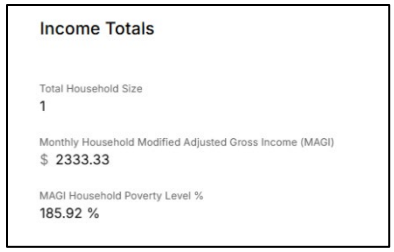
- The income subtab collects information on personal and household income, income adjustments (when applicable), employment status, and tax return details. The client must indicate how they are supported financially and their tax filing status. If the client is employed, they will have to provide proof of income and the personal income section of this subtab will need to be completed. If the client has other household members who have income, their income source(s) must also be entered with documentation provided.
- Ryan White Part B/HMAP assesses income based on household Modified Adjusted Gross Income (MAGI) to calculate the client's federal poverty level (FPL). MAGI uses Adjusted Gross Income and adds back certain forms of income. The number of household members and the household income is required to calculate MAGI and determine if the applicant is eligible for Ryan White Part B/HMAP. More information on MAGI can be found in the HMAP Manual.
    - Additional household members must have their first and last names completed, and their relationship to the client selected from the dropdown.
    - If a client has household members prepopulated in the income section with "Unknown" entered for name and relationship (for example, from a previous application), the full name and relationship to the client must be entered.
- Case managers can check whether a client's income meets the federal poverty level eligibility criteria before completing the eligibility application in NC REEDS by entering the client's income details into the MAGI Calculation Form available on the [HMAP website](#).
- When a client has personal income, start by selecting YES to the question, "Does this applicant have personal income?" The income questions will populate after "Yes" is selected.



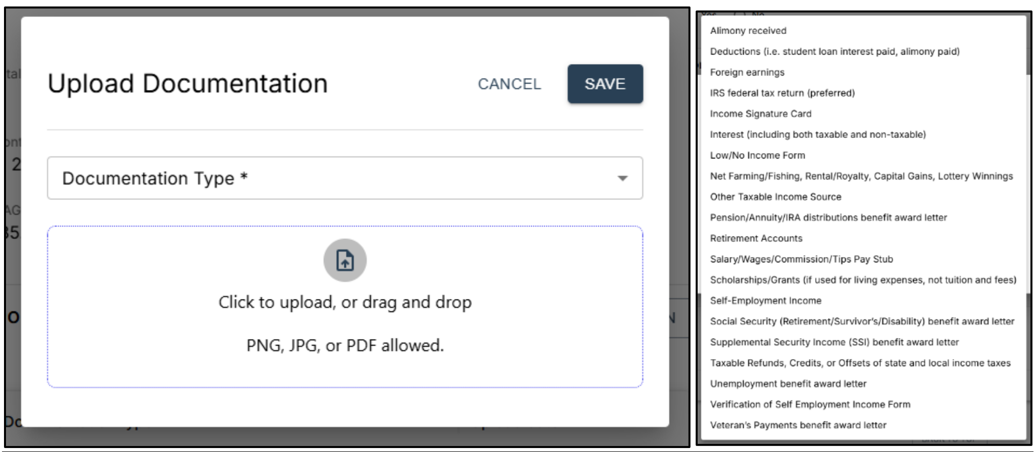
- Each source of income must be added using the Add Income Source button and completing all fields therein.
- When entering income sources for the client, the case manager will be required to identify the income source type (e.g., Salary/Wages/Commissions/Tips, Social Security, Unemployment benefits, etc.), the income period (e.g., monthly, biweekly, etc.), the most recent payment amount, and the date the most recent payment was received.
- ***Please Note***: Documentation of proof of income for a **full month** is required. If the client gets paid on a monthly basis, one month of recent (within 60 days) pay stubs that show year-to-date income and deductions should be entered. If the client gets paid on a biweekly (twice per month) basis, the last two consecutive paystubs (within 60 days) are sufficient. For more information on income documentation, see the HMAP Manual.
- Complete all required fields in the Income section, including household members, household member income sources, employment status, tax filing status, and income adjustments (e.g., contributions to a Health Saving Account, student loan interest deduction, etc.).



- <u>If the client has no documented income or income at or below 125% FPL</u>, the client must provide information as to how they meet basic living needs. This information must be documented in the Ryan White Part B & HMAP Verification of No/Low Income form and uploaded in the Income subtab by the case manager. Outdated versions of the form will not be accepted. The current version of the form can be found on the HMAP website.
- NC REEDS will automatically compute the household income totals and poverty level as income sources and adjustments are entered by the case manager.

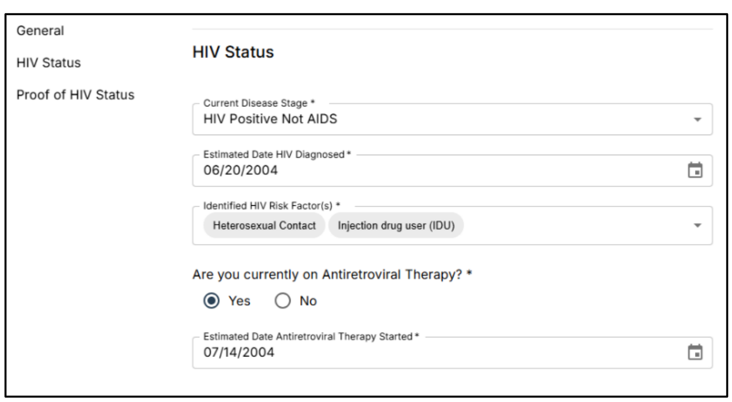


- Case managers are required to enter documentation verifying the client's income source(s). Documentation must be recent (i.e., within the last 60 days). To upload income documentation, navigate to the bottom of the income subtab and select the Add Documentation button.
- Specify the type of documentation (e.g., IRS federal tax return, paystubs, Low/No Income form, etc.). For more information on acceptable income documentation, see the HMAP Manual which can be found on the [HMAP website.]
- Once the documentation has been selected, click the Upload button.

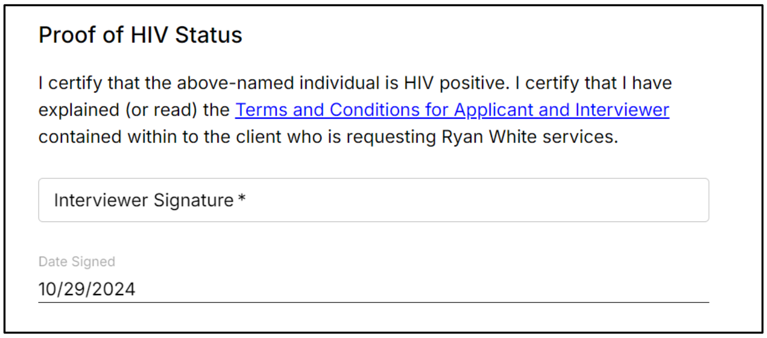


Health Subtab

- The Health subtab collects information on the client's overall health, including HIV status, Hepatitis C diagnosis, medication history, and Proof of HIV Status.
- Complete all required fields in the health subtab, including HIV status, estimated HIV diagnosis date, and antiretroviral therapy history.

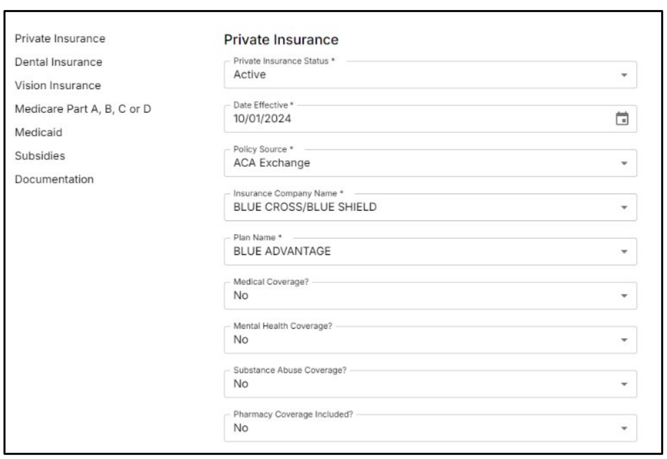


- Proof of HIV Status: Case managers are required to certify the client is HIV positive. Please share the “Terms and Conditions” that are available for download from the application with your clients. To verify the client’s HIV status, the case manager will be prompted to enter their electronic signature in NC REEDS. This signature will serve as proof documentation of the client’s HIV status. The date signed will automatically populate once signed.



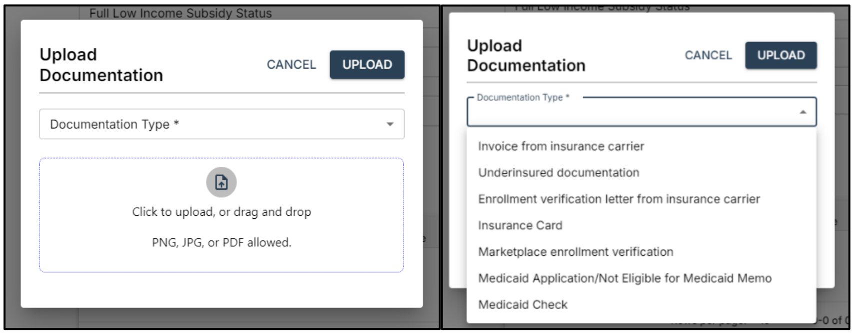
Insurance Subtab

- The Insurance subtab collects information on the client’s enrollment in health insurance programs, such as ACA Marketplace coverage, Medicare coverage, and Medicaid coverage.
- If the client has insurance coverage, the case manager will be prompted to provide information in the applicable section, including the member ID, policy source (e.g., ACA marketplace, employer-sponsored, Medicare, etc.), coverage details (e.g., pharmacy, dental, substance use, etc.), and premium amount.
    - ***Please Note:*** Premium Amount and Premium Payment Frequency are required fields. If you do not have access to this information, please enter $0.00 as the premium amount and select Monthly as the Premium Payment Frequency.



- Case managers are required to enter documentation verifying the client’s insurance coverage when the client has active insurance coverage. To upload insurance documentation, navigate to the bottom of the insurance subtab and select the Add Documentation button.

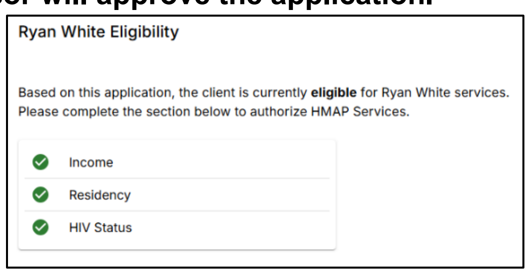
- Specify the type of documentation (e.g., insurance card, insurance carrier invoice, ACA Marketplace enrollment verification, etc.). For more information on acceptable insurance documentation, see the HMAP Manual.
- Once the documentation has been selected, click the Upload button.



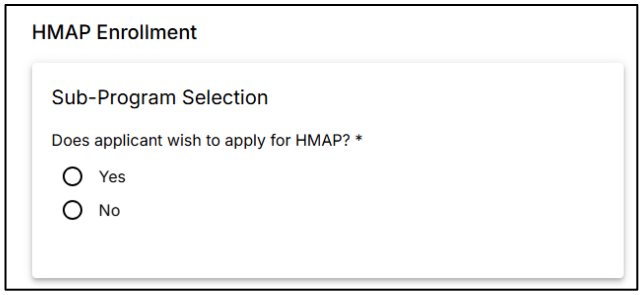
- If the client is at or below 140% of the Federal Poverty Level, they are required to submit proof they applied for Medicaid. This does not apply to applicants unable to apply for Medicaid for reasons such as undocumented status. Proof of the Medicaid application or letter from the case management agency must be uploaded in the Upload Documentation section of this subtab.
- For more information on the HMAP subprogram insurance coverage eligibility criteria, see the HMAP Manual which can be found on the HMAP website.

Services Authorization

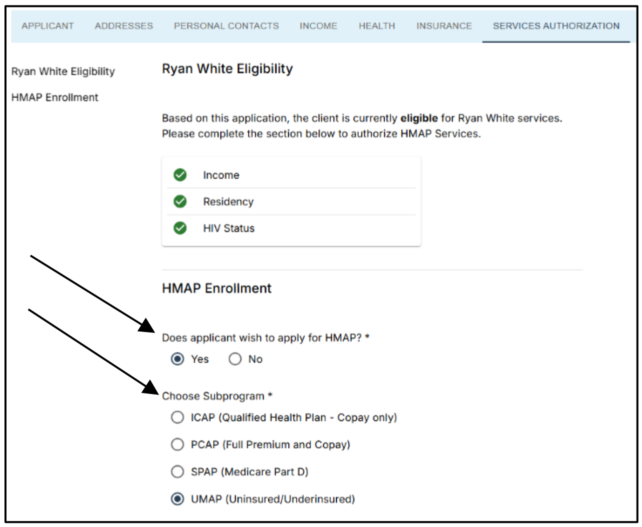
- Once all required eligibility information and documentation has been entered in NC REEDS, the Services Authorization subtab will automatically generate a preliminary eligibility status for Ryan White Part B and HMAP based on the client's information. **Part B and HMAP processors make the final determination on a client's eligibility and enrollment. Just because NC REEDS has determined the client eligible does not guarantee the processor will approve the application.**



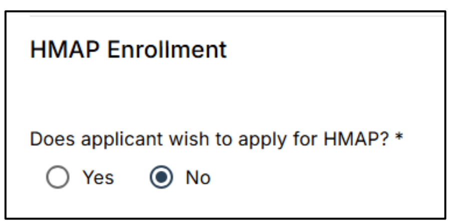
- If the client is determined to be ineligible for Ryan White services based on the information entered by the case manager, the Services Authorization subtab will indicate which eligibility criteria were not met.
- The HMAP Enrollment section of this subtab must be completed by selecting either Yes or No to the question "Does the applicant wish to apply for HMAP?"



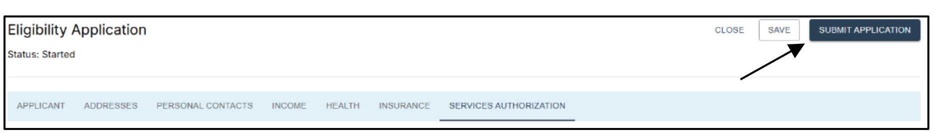
- If the client is applying for HMAP, the case manager must indicate that the applicant is applying for HMAP by selecting YES and selecting the HMAP subprogram for the client in this section of the Services Authorization tab.



- If the client is NOT applying for HMAP, the case manager must select NO in this section of the services authorization tab.



- Case managers can submit applications for processor review once all information and required documentation has been entered into NC REEDS by selecting the Submit Application button in the top right corner of the screen. If required fields or documentation is missing, the section(s) with missing information will be flagged with red exclamation points. Case managers can navigate back to the flagged section(s) by clicking on the relevant tab(s).

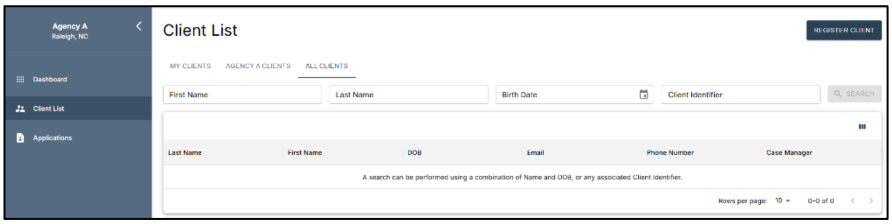


Checking Client Application Status

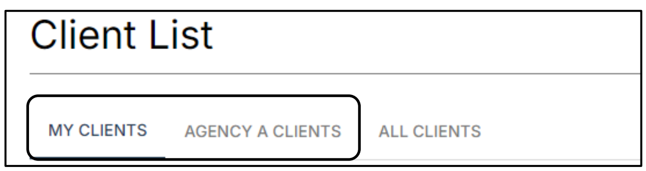
The following section describes how to check a client's application status.

<u>Client Eligibility Timeline</u>

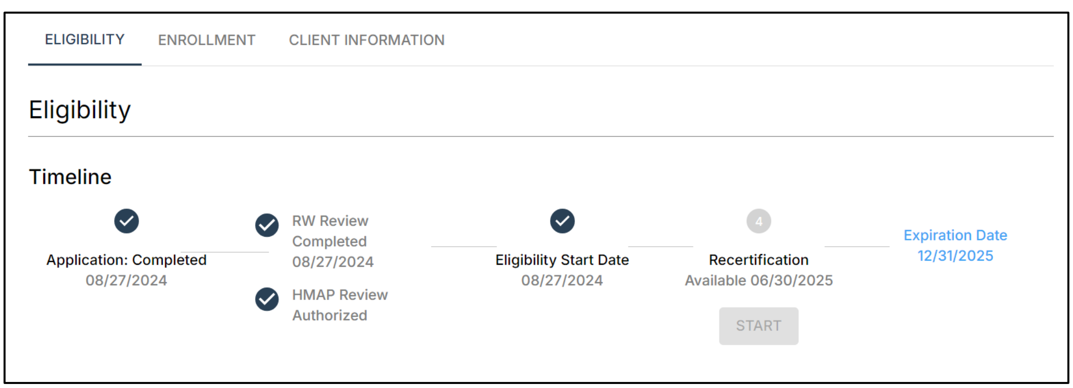
- Case managers can check the status of a client's application by navigating to the client's eligibility timeline in the client's file. To access the eligibility timeline, navigate to the client's file by searching for their identifiers (i.e., name and DOB, or case number) in the Client List page.



- For easier access, case managers can quickly find any client assigned to their agency under the My Agency subtab in the Client List tab. Similarly, if the case manager is listed as the Lead Case Manager in the client's file, the client can be found under the My Clients subtab.
    - ***Please Note:*** For information on assigning a new case manager as the lead case manager for a client coming from a different agency, see the Frequently Asked Questions – Client Applications section of this manual.

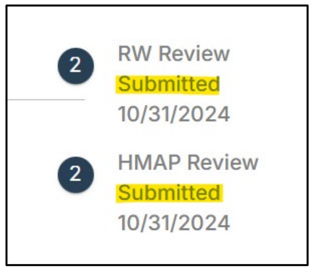


- In the eligibility timeline, case managers can track the status of a client's application.

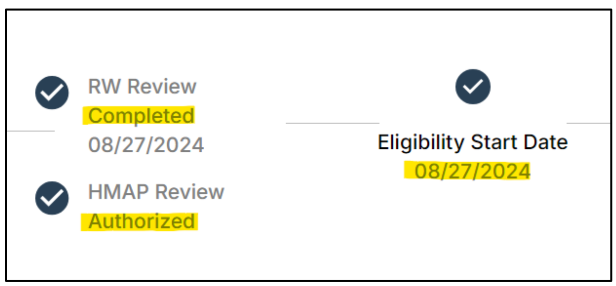


- The eligibility timeline contains the following information:
    - **Application**: Indicates the date the case manager completed and submitted the client's application.
    - **RW Review/HMAP Review**: Indicates the date the processors reviewed and authorized the client for services.

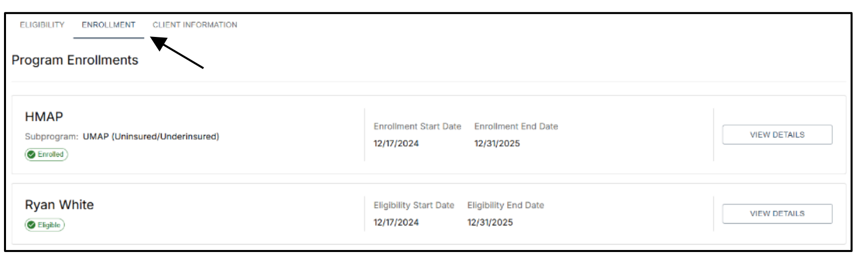
  - **Eligibility Start Date**: Indicates the date the client is eligible and authorized to receive Ryan White services.
  - **Recertification**: Indicates the date the client's recertification application can be started.
  - **Expiration Date**: Indicates the date the client's eligibility for Ryan White ends.
- Case managers can verify their application was successfully submitted to the processors for review by looking at the Ryan White/HMAP Review section of the eligibility timeline. A status of Submitted indicates the application was received and is in the queue for review.



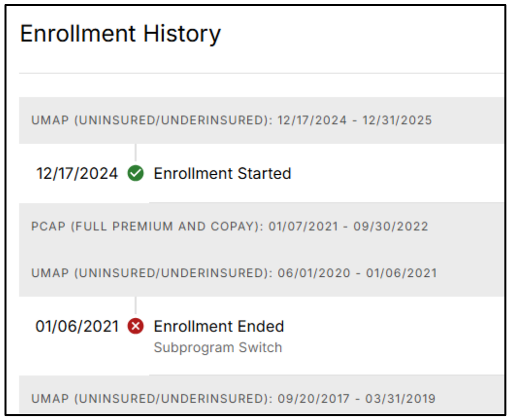
- Case managers can verify the application was approved and authorized for services by looking at the Ryan White/HMAP Review section of the eligibility timeline. A status of Completed/Authorized and an eligibility start date indicates the client was approved and successfully enrolled.



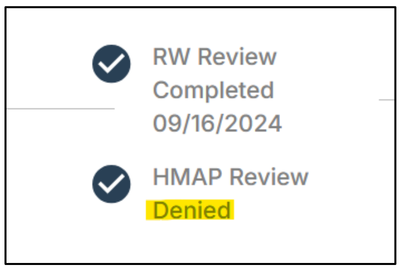
- Case managers should also verify the client's enrollment HMAP by navigating to the Enrollment tab in client's file.



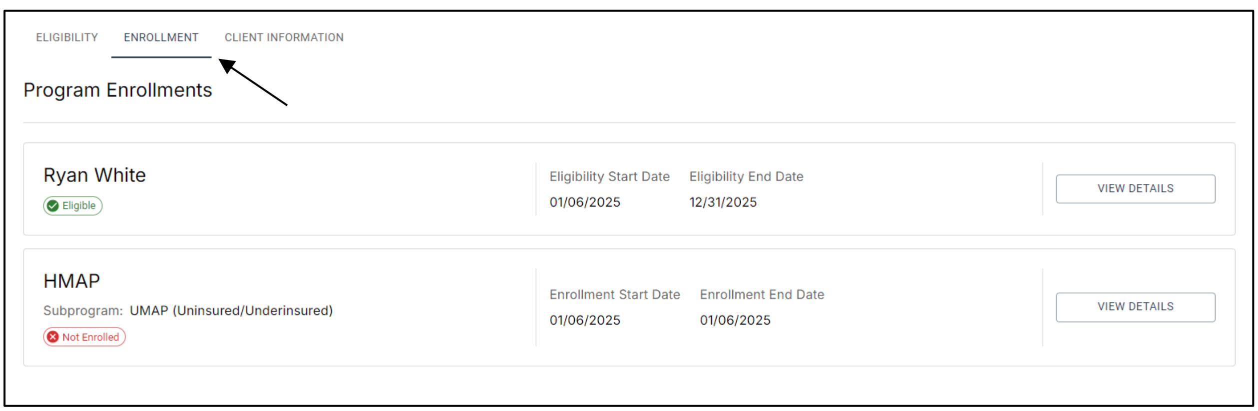
- In the enrollment tab, case managers can see the client's current HMAP enrollment, future HMAP enrollment periods, and HMAP enrollment history by clicking the View Details button to expand enrollment details.



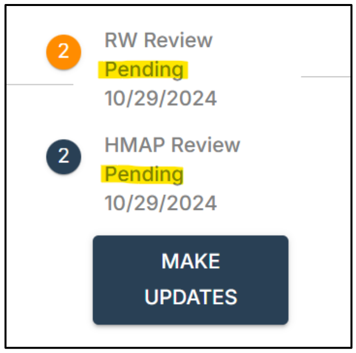
- If a client was denied HMAP services, this will be indicated in the eligibility timeline under Ryan White/HMAP Review. In the example below, the client was authorized for Ryan White care services but denied from HMAP.



- In this example, the case manager can verify the client was approved for Ryan White but denied from HMAP by navigating to the Enrollment tab.

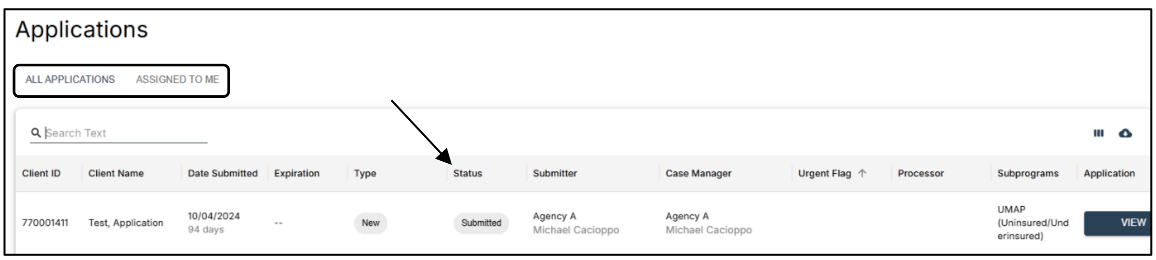


- If a client's application was pended, this will be indicated on the eligibility timeline under Ryan White/HMAP Review. The case manager can select the Make Updates button to open the client's application and identify why the processors pended the application. For more information on pended applications, see the Pended Applications section of this manual.

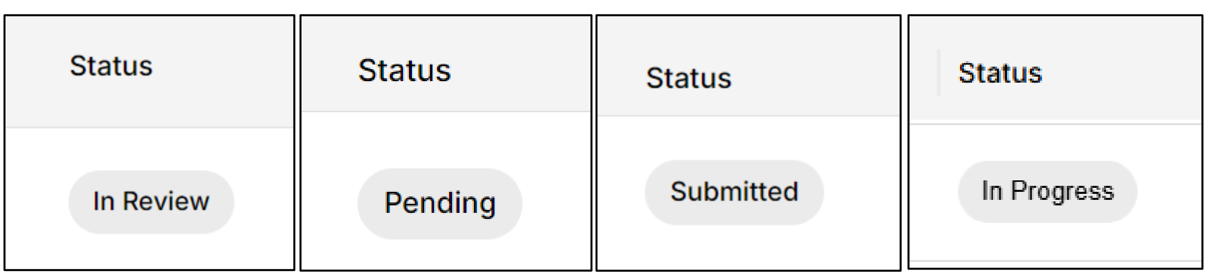


Application Tab

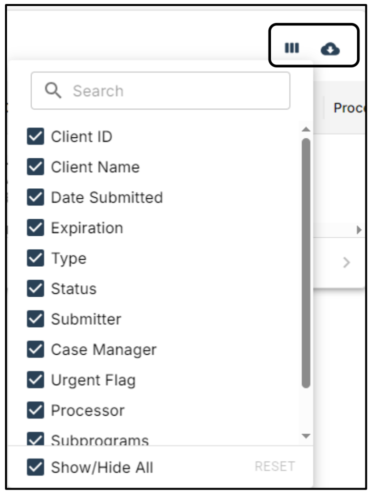
- Case managers can also check the status of a client's application by navigating to the Application tab. The applications tab includes two subtabs:
    - **All Applications**: Contains all applications in the NC REEDS system.
    - **Assigned To Me**: Contains all applications completed by the case manager's NC REEDS user account.
- Case managers can search for a client in the All Applications subtab or in the Assigned To Me subtab to quickly find applications they've submitted and applications they have started but not yet submitted.
- The client's application status will be indicated under the Status header in the Applications page.



- Application statuses include the following:
    - **Submitted:** Indicates the client's application has been submitted and is awaiting processor review.
    - **In Review:** Indicates the client's application is in review by the processing team.
    - **Pended:** Indicates the processor has returned the application to the case manager requesting additional information before authorizing the client. For more information on pended applications, see the Pended Applications section of this manual.
    - **In Progress:** Indicates the client's application was started and not yet submitted.



- Case managers can check which fields they want displayed in the Applications tab by clicking the three pillars icon. Case managers can also download the Applications tab as a CSV file by clicking the cloud with a down arrow icon.

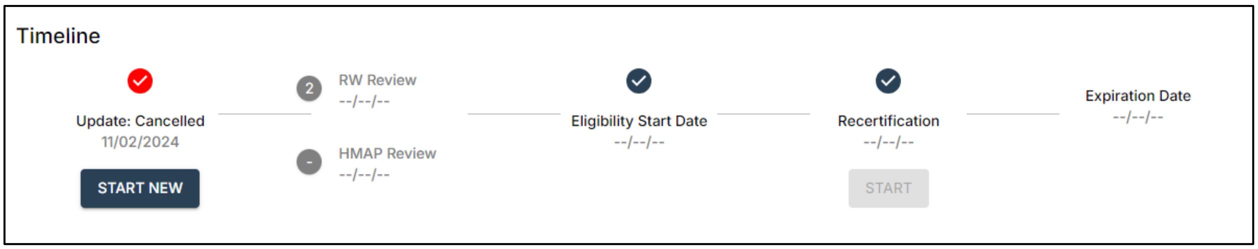


- ***Please Note:*** Once a client's application has been approved or denied, it will no longer show up in the Applications tab. To check the client's application status after the application has been approved or denied, navigate to the eligibility timeline in the client's file. For more information on navigating the eligibility timeline, see the Eligibility Timeline section of this manual.

Pended Applications

The Ryan White/HMAP processing team may pend applications for a number of reasons. The most common reasons applications are pended include needing additional documentation or information from the client/case manager. Reasons for a pended application will be communicated directly in NC REEDS via processor comments. **Pended applications must be resolved within 30 days of the date they were originally pended by the processors and returned to the case manager for updates**.

Case managers who do not resolve pended applications within 30 days will need to start a new application for the previously pended client. For new clients (i.e., those not currently enrolled in Ryan White/HMAP), unresolved pended applications will show as **Cancelled** in the client's eligibility timeline under the Application header. Case managers will need to restart the client's application by selecting the Start New button.

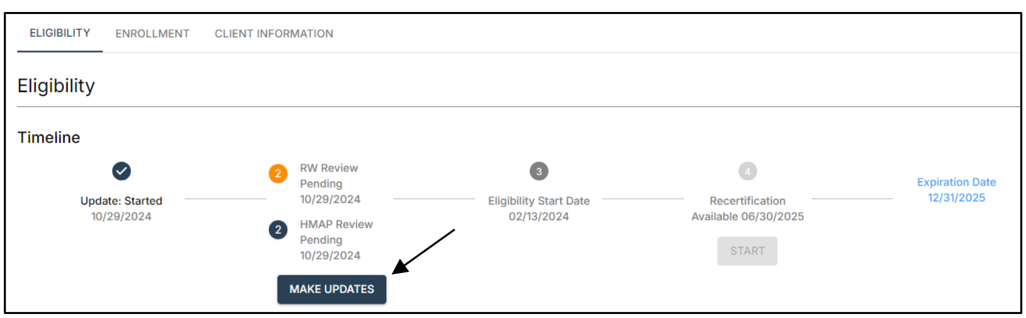


Pended recertification applications unresolved after 30 days will also require new applications. Clients will not be recertified through the next Ryan White/HMAP coverage period unless the case manager submits a new recertification application for the client.

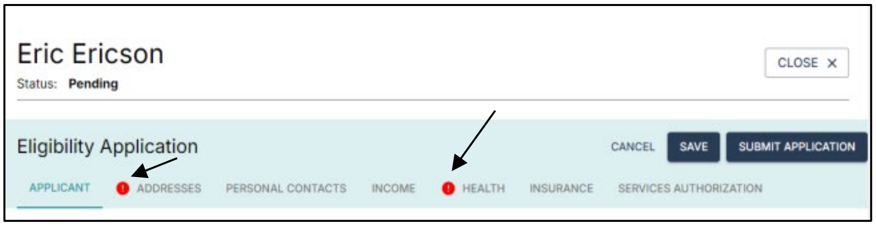
The following section provides an overview for resolving pended applications in NC REEDS. For more information on pended applications, see the HMAP Manual.

Updating a Pended Application

- Case managers can see that a client's application has been pended in the client's eligibility timeline and/or the Applications tab.
- In the eligibility timeline, an application status of Pending will be indicated under the Ryan White/HMAP Review header.
- Click on the Make Updates button under the Ryan White/HMAP Review header to reopen the client's application and identify the sections that need updates.

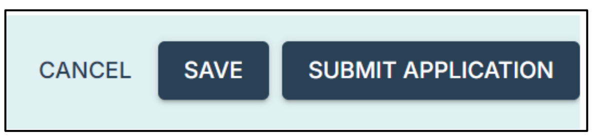


- Once the case manager clicks the Make Updates button, the section(s) needing update(s) will be indicated with a red exclamation mark.

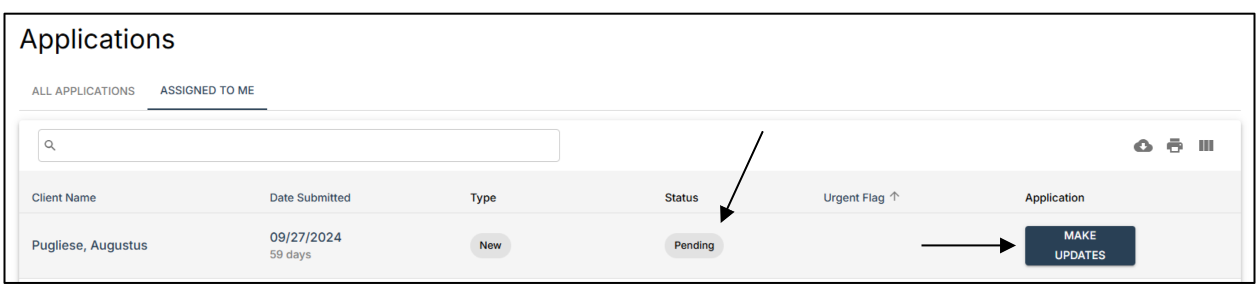


- Navigate to the section(s) requiring update(s) and review the processor comments for more details on the requested changes. Case managers can resolve comments after satisfying the processor requests by clicking the Resolve Comment button. If case managers need more information from the processor, they can also reply directly to the comment by clicking the Reply button.

- Once the requested updates have been made, the case manager can resubmit the application by selecting the Submit Application button.



- Case managers can also see that a client's application has been pended in the Application tab. To do so, navigate to the Applications tab. Click either the Assigned to Me tab or search the client's identifiers in the All Applications tab. Case managers who submitted the pended application or update will see the application or update on their Assigned to Me tab listed with a Status of Pending.



- Case managers can select the Make Updates button under the Application header to reopen the client's application and identify the sections that need updates.

- For more information on checking the status of a pended application once it has been resubmitted, see the Checking Client Application Status section of this manual.
- ***Please Note:*** Case managers can generate a list of clients whose applications have been pended by using the Dashboard tab in NC REEDS. For more information, see the Additional NC REEDS Resources – Dashboard section of this manual.

Recertification Applications

Recertification applications refer to Ryan White/HMAP applications for clients who are currently enrolled in Ryan White and/or HMAP and are applying to renew enrollment for the next coverage period. Client recertifications are completed for Ryan White and/or HMAP services annually. **The annual recertification period for Ryan White/HMAP services is July 1 through September 30.** The following section provides details on completing the recertification application. For more information on recertification, see the HMAP Manual.

Submitting a Recertification Application

- Case managers can check when a client's recertification application can be started by navigating to the eligibility timeline in the client's file.
- To access the eligibility timeline, navigate to the client's file by searching for their identifiers (i.e., name, DOB, and/or case number) in the Client List page.
- In the eligibility timeline, case managers will see the date the client's recertification application can be started under the Recertification header.

- When the recertification date has been reached, the case manager can click the Start button underneath the Recertification header to begin the client's recertification application.
- The requirements for recertification applications are the same as the requirements for a new application.
- When completing the recertification application, NC REEDS will automatically pull the most recent details that were entered for the client in their previous eligibility application. Case managers will still need to upload current (within the past 60 days) documentation to successfully complete the recertification application.
- Case managers can navigate between the eligibility application subtabs to complete and update the client's application. For more information on completing the eligibility application, see the Eligibility Application section of this manual.
- ***Please Note:*** If a case manager starts but does not submit a recertification application, that application will be locked until completed and submitted by the case manager. It will not be reviewed by the processing team until it is finalized and submitted.
- ***Please Note:*** If a recertification application has not been approved before the new enrollment period begins (for example, at the start of the new calendar year) or before the client's current enrollment expires, a new application will need to be started for the client in the current enrollment period.

Client Updates

Case managers are required to notify the Ryan White/HMAP processors whenever there has been a change in client information (e.g., address, phone number, income, family size, insurance coverage, etc.). Most client changes require processor review to verify the client is still eligible for Ryan White/HMAP services. The following section provides an overview of how to submit client updates in NC REEDS.

<u>Submitting a Client Update in NC REEDS</u>

- Navigate to the client's file by searching for their identifiers (i.e., name, DOB, and/or client ID) in the Client List page.
- Open the client's file and navigate to the Client Information subtab.

- Enter any changes to client information by navigating to the relevant subtab (e.g., Addresses, Income, Insurance, etc.). Click the Save button to save your changes.
- If the case manager makes updates to the client profile that <u>do not impact eligibility</u>, the changes will be saved and updated immediately upon hitting the Save button. The changes will not go to the processing team for review. Updates that do not require processor review include changes made in the following sections:
  - Personal Contacts
  - Care Team
- If the case manager makes an update to the client profile that <u>could possibly impact eligibility</u>, the client's profile will be submitted to the processing team for review. Updates that require processor review include changes made in the following sections:
  - Client Details
    - ***Please Note***: If updating the client's name, documentation of the name change must be uploaded in the Client Details section.
  - Addresses
  - Income
  - Insurance
  - Health
- If the case manager makes an update to the client's profile to indicate the client is deceased:
  - On the Client Details tab scroll down to the Deceased section and click on the "Is Deceased?" toggle.
  - Two new required fields will appear; please fill out the date the client passed away, if unknown please use the date you are reporting the client is deceased. Please fill in the "Cause of Death" if known, if not known please type "unknown" in that field.

    - NC REEDS will automatically disenroll the client from HMAP and terminate their Part B Care eligibility as of the date the client's passing is reported.
  - After the case manager makes the change and clicks the Save button, the NC REEDS screen will refresh to indicate the change has been submitted and is awaiting processor review. The fields in the client profile will be locked until the processor reviews the changes.

- For updates requiring processor review, case managers can check the status of the client's application by navigating to the client's eligibility timeline and/or the Applications tab. For more information on checking a client's application status, see the Checking Client Application Status section of this manual.
- ***Please Note:*** If a case manager does not have the new address of a client who has moved out of state and needs to be terminated from Ryan White/HMAP, the case manager can submit an Addresses update with "Client moved out of state" in the furst address line, then enter the client's new state's capital and zip code as the client's new address. Changing the client's address to a non-North Carolina address will automatically terminate the client.
- ***Please Note***: Once the case manager makes and saves an update on any of the subtabs that require processor review, certain subtabs in the client profile will be locked until the processors review and approve the change.
  - **Client Details:** Updates to the client's name, date of birth, social security number, or deceased status will lock only the Client Details subtab while waiting processor review.
  - **Addresses:** Any update on the Addresses subtab will lock the Addresses subtab and the Insurance subtab while waiting processor review.
  - **Income:** Any update on the Income subtab will lock only the Income subtab while waiting processor review.
  - **Health:** Updates to the client's HIV disease stage will lock only the Health subtab while waiting processor review.
  - **Insurance:** Any update on the Insurance subtab will lock the Insurance subtab and the Addresses subtab while waiting processor review.

Incarcerated Clients

Individuals incarcerated in a local detention center may be eligible for Ryan White/HMAP if the local detention center is unable to pay for HIV-related medications and the client is not in the custody of the State or Federal prison system. Individuals housed in State or Federal prisons or housed in a local detention center under the custody of State or Federal prison are ineligible for Ryan White/HMAP because the State and Federal prison systems are required to provide medical care, treatment, and medication.

For more information on the North Carolina Ryan White/HMAP policy on serving individuals incarcerated in local detention centers, see the HMAP Program Manual found on the HMAP website.

Statement of Financial Need

Local detention centers participating with Ryan White/HMAP must provide a Statement of Financial Need that documents the facility's inability to pay for HIV-related medications. The Statement of Financial Need must explain why the facility cannot provide HIV-related medications on the facility's letterhead and signed by an authorized official (Jail Health Administrator, Medical Director, clinician, Financial Officer, Operations Manager, etc.).

The HMAP office will review and approvement Statements of Financial Need submitted by local detention centers within two business days. The Statement of Financial Need will cover all individuals incarcerated at that facility for up to 12 months from the date it was signed. Each local detention center is required to provide a new Statement of Financial Need annually (based on the date the previous Statement was signed). The HMAP Office will contact participating local detention centers when it is time for them to renew the Statement.

Jail staff cannot submit Ryan White/HMAP applications in NC REEDS if the Statement of Financial Need is out of date. To verify whether your facility has a current Statement, contact Iris Girard at Iris.Girard@dhhs.nc.gov.

Completing the Eligibility Application for Clients in Jail

The following section describes how to complete the eligibility application for clients that are currently in a local detention center.

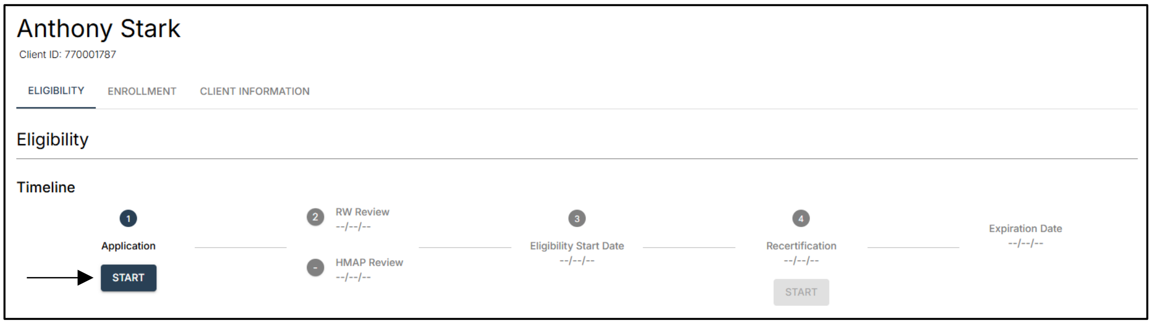
Searching a Client and Checking For an Existing Record

Before starting an eligibility application for a client in NC REEDS, use the NC REEDS client search feature to check whether the client has an existing NC REEDS profile. Avoiding duplicate client profiles in NC REEDS is essential to ensuring there are no delays in medication dispensing or service provision for clients. For more information on searching for duplicates, see the Submitting a New Client Eligibility Application in NC REEDS section of this manual.

If the client does not already exist in NC REEDS, proceed to create a new profile for the client. For more information on registering a new client in NC REEDS, see the Registering a New Client section of this manual.

Starting the Eligibility Application

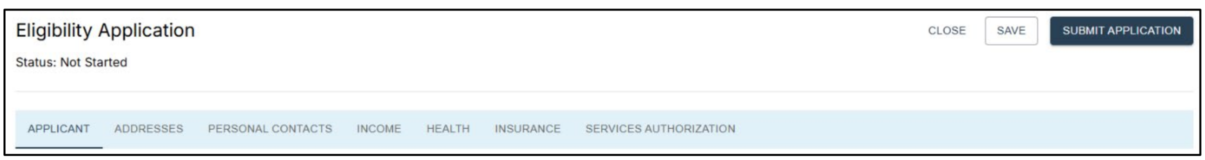
- After registering and saving a new client profile in NC REEDS or after selecting an existing client in NC REEDS, the system will automatically open to the client's eligibility timeline. All client applications will be initiated in the client's eligibility timeline. To begin the application, click the Start button beneath the Application header.



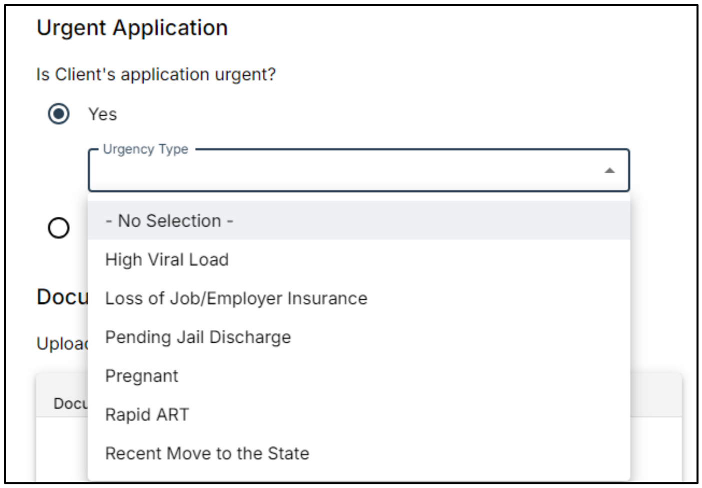
- Jail staff can open the client's eligibility timeline at any point by searching the client in the Client List tab and selecting the client's profile from their My Clients subtab. The client can also be located by searching their information in the All Clients tab or My Agency subtab.

Applicant Subtab

- The eligibility application will contain several subtabs to complete to determine the client's eligibility for HMAP and/or Ryan White Part B care services.

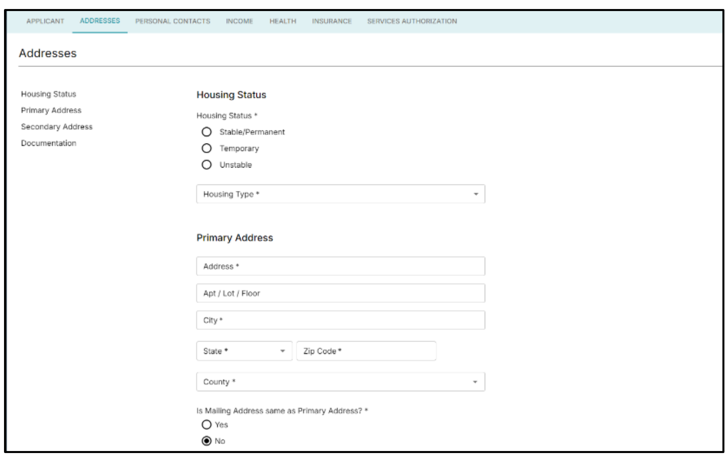


- Once in the eligibility application, NC REEDS will open into the Applicant subtab. Several fields will automatically populate based on the information recorded when the client was registered (e.g., name, date of birth, gender identity).
- Complete all required fields in the applicant subtab.
    - While email address is a required field, you can enter your own work email address or type "No email address."
- The applicant subtab is where jail staff can designate if an applicant is **urgent**. If the jail staff indicates the application is urgent, they will be prompted to select a reason why the application is urgent. Indicating a client's application as urgent will move the application to the top of the processors' queue.

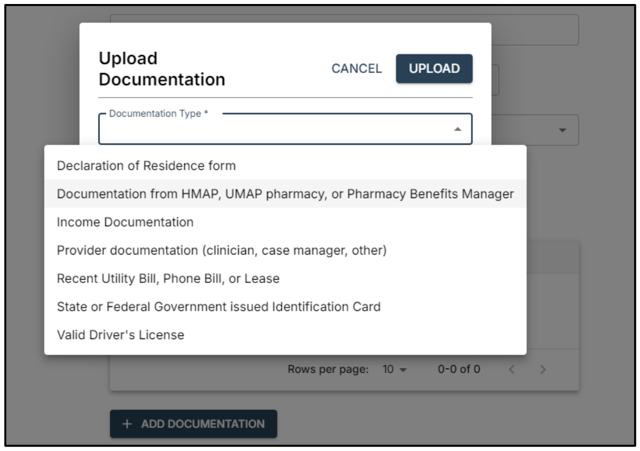


Addresses Subtab

- For new HMAP clients in a local detention center, enter their Primary Address as their last known physical address.
- Select NO to the question, “Is mailing address the same as primary?”
- Enter the **jail address** as the Mailing Address.
- Enter the name of the jail as the “Mail to Name.”



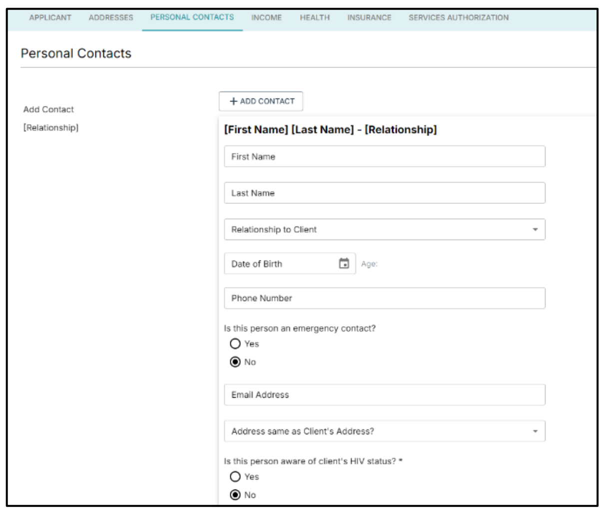
- Residency documentation must be uploaded in the Addresses. For jail clients, complete and upload the Declaration of Residence Form. The current version of the form can be found on the HMAP website.
- To upload the Declaration of Residence form, navigate to the bottom of the address subtab and select the Add Documentation button.
- Under Documentation Type, select Declaration of Residence.



- Once the documentation has been selected, click the Upload button.

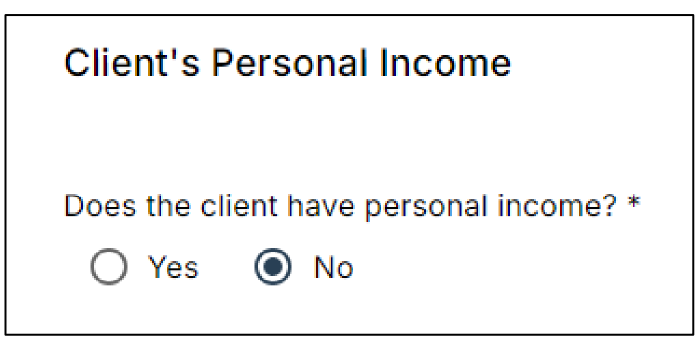
<u>Personal Contacts Subtab</u>

- In the Personal Contacts subtab, enter the jail interviewer's information. Include the interviewer's phone number or email address.
- For Relationship to Client, select "Incarceration Interviewer."

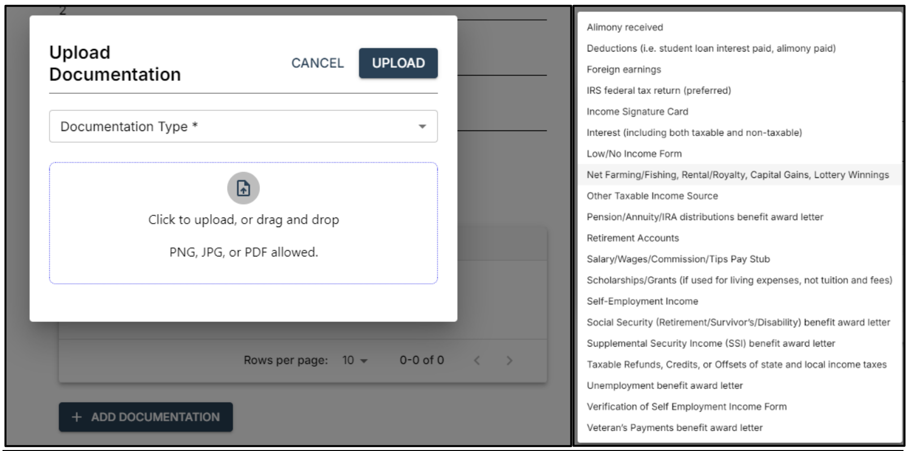


<u>Income Subtab</u>

- For clients in a local detention center, select NO to the question, "Does the applicant have personal income?"

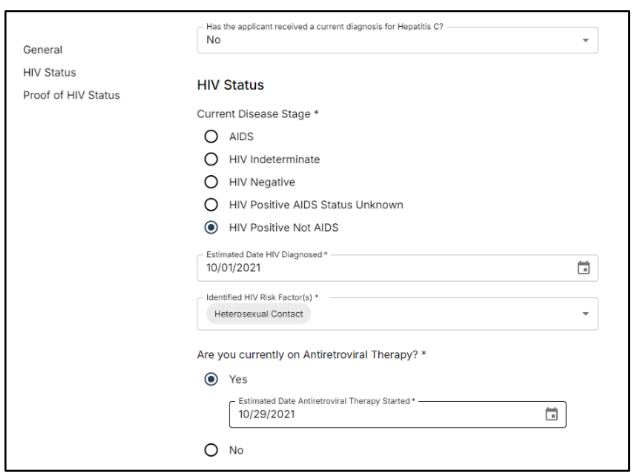


- Complete all required fields in the income section, including information on applicant's household income, employment status, and tax filing status.
- Jail staff are required to enter documentation verifying the client's income. For jail clients, complete and upload the No/Low Income Form. The current version of the form can be found on the HMAP website.
- To upload the No/Low Income form, navigate to the bottom of the Income subtab and select the Add Documentation button.
- Under Documentation Type, select No/Low Income Form.
- Once the documentation has been selected, click the Upload button.

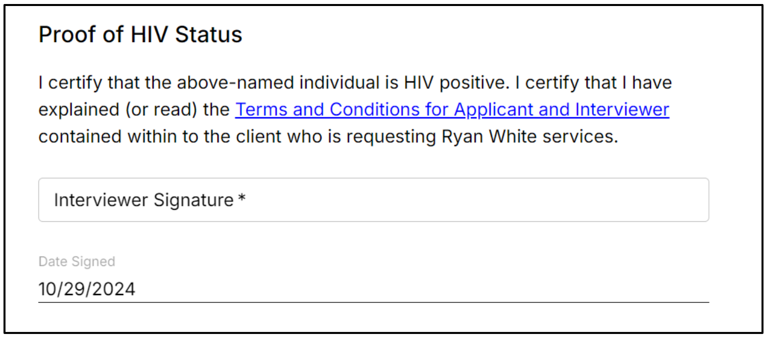


Health Subtab

- Complete all required fields in the health subtab, including HIV status, estimated HIV diagnosis date, and antiretroviral therapy history.



- Proof of HIV Status: Jail staff are required to certify the client is HIV positive. Please share the "Terms and Conditions" that are available for download from the application with your clients. To verify the client's HIV status, the jail staff will be prompted to enter their electronic signature in NC REEDS. This signature will serve as proof documentation of the client's HIV status. The date signed will automatically populate once signed.


Proof of HIV Status

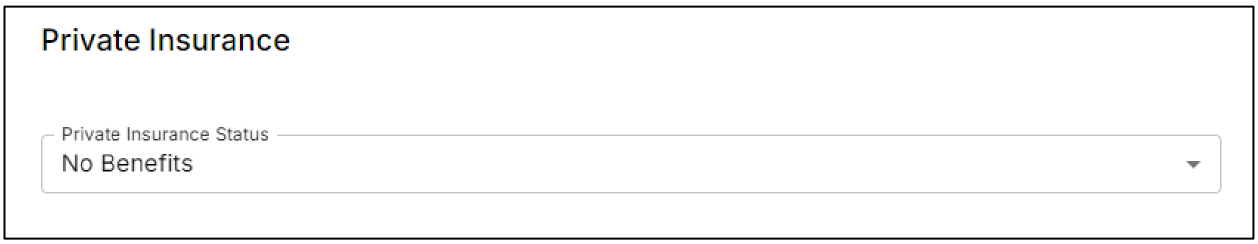
I certify that the above-named individual is HIV positive. I certify that I have explained (or read) the Terms and Conditions for Applicant and Interviewer contained within to the client who is requesting Ryan White services.

Interviewer Signature *

Date Signed
10/29/2024

Insurance Subtab

- On the Insurance tab, select No Benefits.
- Complete all required fields on the Insurance tab.

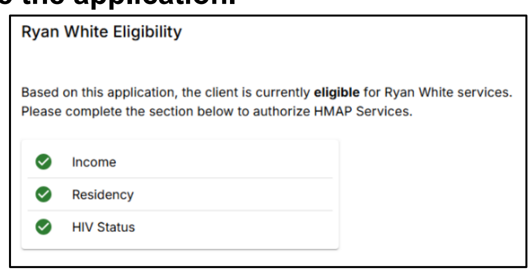

Private Insurance

Private Insurance Status
No Benefits

- ***Please Note:*** If a client at your local detention center has Medicaid, they may still apply for HMAP and receive medications if they are approved. However, the client will be terminated from HMAP upon release if they still have active Medicaid.

Services Authorization

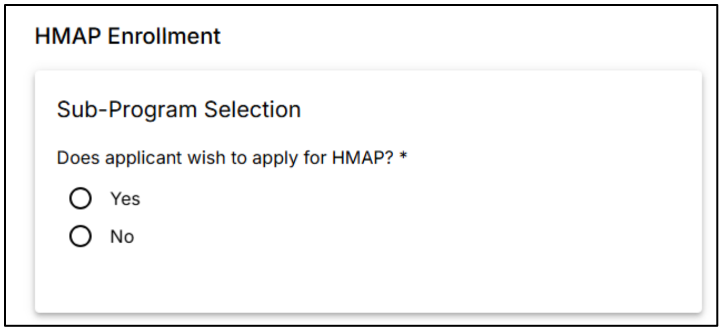
- Once all required eligibility information and documentation has been entered in NC REEDS, the Services Authorization subtab will automatically generate a preliminary eligibility status for Ryan White Part B and HMAP based on the client's information. **Part B and HMAP processors make the final determination on a client's eligibility. Just because NC REEDS has determined the client eligible does not guarantee the processor will approve the application.**


Ryan White Eligibility

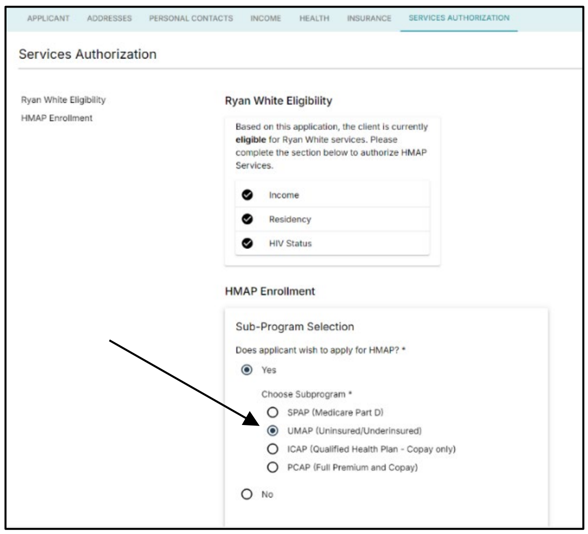
Based on this application, the client is currently **eligible** for Ryan White services. Please complete the section below to authorize HMAP Services.

Income
Residency
HIV Status

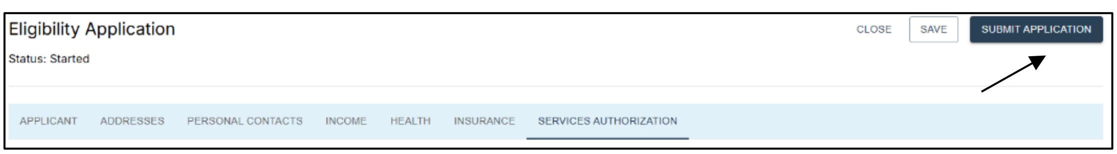
- If the client is determined to be ineligible for Ryan White services based on the information entered by the case manager, the Services Authorization subtab will indicate which eligibility criteria were not met.
- The HMAP Enrollment section of this subtab must be completed by selecting either Yes or No to the question "Does the applicant wish to apply for HMAP?"



- Select YES to the question, “Does the applicant wish to apply for HMAP?” Select UMAP as the subprogram.



- The application can be submitted for processor review once all information and required documentation has been entered into NC REEDS by selecting the Submit Application button in the top right corner of the screen. If required fields or documentation is missing, the section(s) with missing information will be flagged with red exclamation points. Case managers can navigate back to the flagged section(s) by clicking on the relevant tab(s).



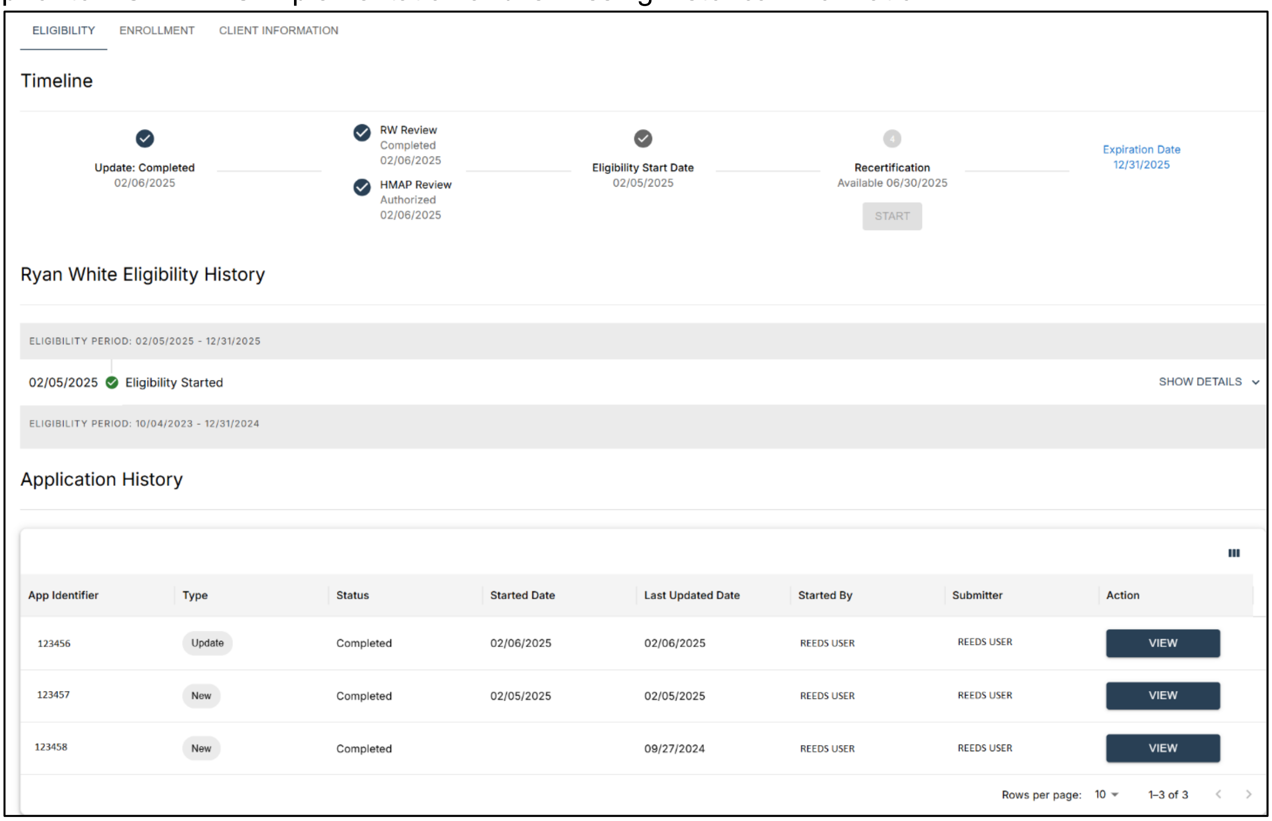
Additional NC REEDS Resources

The following section provides an overview of additional NC REEDS resources for case managers and supporting agencies.

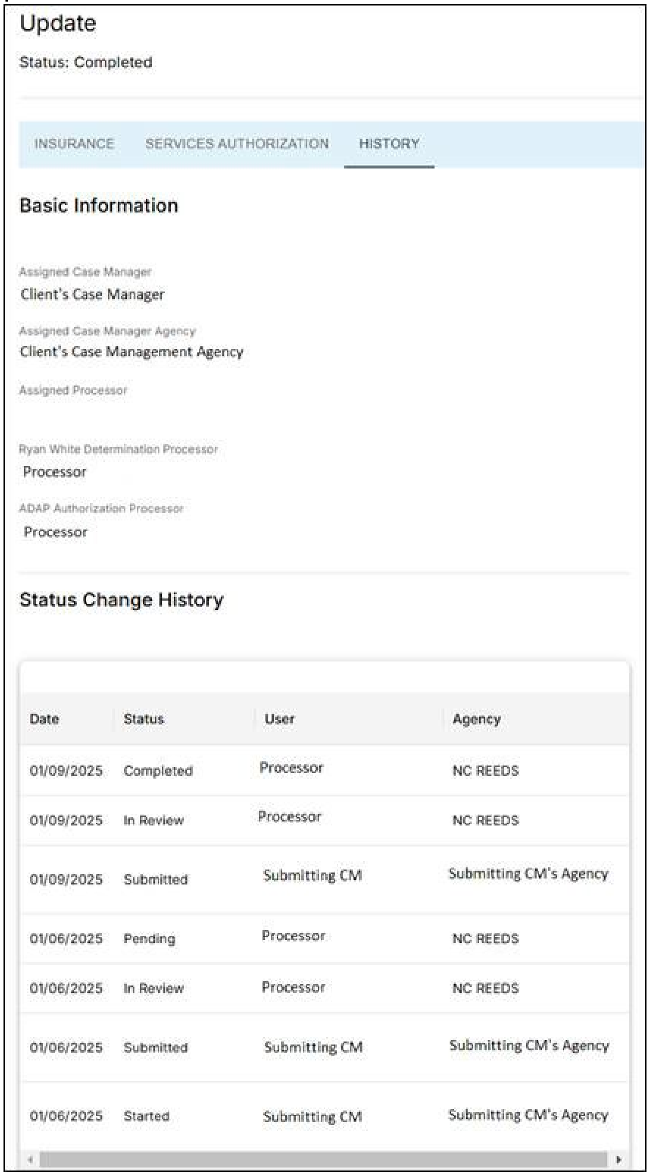
Application History

The Application History feature in NC REEDS is used to show the historical information collected within NC REEDS from previous applications and updates that have been submitted in NC REEDS. NC REEDS users can access clients' historical applications and updates after processing is complete. A history of when the application or update was submitted, reviewed, pended, and approved is also available for any application or update that has been submitted in NC REEDS. To view a client's Application History navigate to the client's eligibility page and scroll down past their Ryan White Eligibility History to the section labeled "Application History". To view the history of a specific application, click the "VIEW" button to open the application and click on the "HISTORY" tab to see who submitted it, when it was submitted, who reviewed it, etc.

See below for an example of the Eligibility page. The historical information is only available for applications and updates that have been submitted since NC REEDS implementation in October 2024. In the example below, there are two updates that were submitted through NC REEDS and historical information is available. The oldest record in the example below is from prior to NC REEDS implementation and is missing historical information.

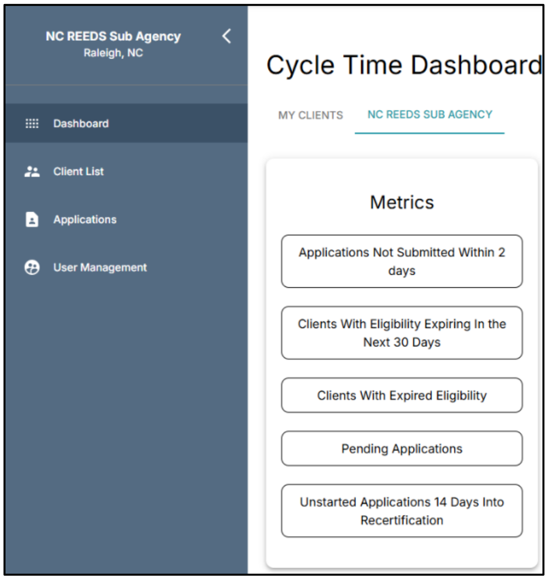


See below for an example of the new History Tab that provides historical information about the specific update that was submitted through NC REEDS, including who submitted it, who processed it, status, and dates.



Dashboard

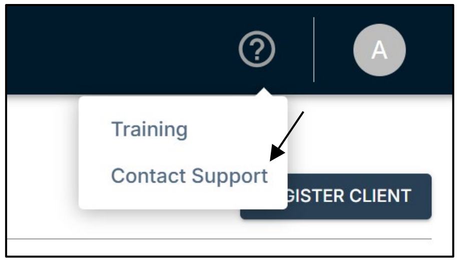
The dashboard feature in NC REEDS is used to show helpful metrics for clients at your agency. When the user clicks on a metric name, NC REEDS will generate a list of all the clients/applications that fall into that category. The list will also contain blue buttons that allow the user to take action for the client, such as Making Updates to a pended application. The following section provides a description of each of the metrics available in the Dashboard tab.



- **Applications Not Submitted Within 2 Days:** Generates a list of clients whose applications were started more than 2 days ago but have not been completed and submitted for processor review.
- **Clients with Expiring Eligibility in the Next 30 Days:** Generates a list of clients whose eligibility will expire/end within the next 30 days. Clients included on this list need to be recertified to ensure they do not fall off Ryan White and/or HMAP within the next 30 days.
- **Clients with Expired Eligibility:** Generates a list of clients whose eligibility is currently expired.
- **Pending Applications:** Generates a list of clients whose applications have been pended by the processing team and returned to the case manager for changes. These applications need to be updated with the requested changes and returned to the processors for review.
- **Unstarted Applications 14 Days into Recertification:** Generates a list of clients who became eligible for recertification more than 14 days ago but have not had their recertification application started or submitted.

IT Help Desk Ticket

- Case managers that have an IT-related NC REEDS issue can submit a ticket to the Groupware Help Desk directly in NC REEDS. To submit a ticket, navigate to the Question Mark button in the top right corner of the screen and select Contact Support.



- Enter the details of the issue in the Submit a ticket page and click Submit. The team from Groupware will respond to the requests.

NC REEDS Help Email Account

- Case managers can reach out directly to NC DHHS staff with NC REEDS programmatic questions to NCREEDSHelp@dhhs.nc.gov.

Appendix A – Frequently Asked Questions (FAQs)

The following section provides guidance for frequently asked questions about NC REEDS.

<u>Account Set-Up</u>

I forgot my password. How do I create a new one?

Contact your NC REEDS agency administrator or the NCREEDSHelp@dhhs.nc.gov email account to request a password reset link. When you reset your password, you will also need to reconfigure your multifactor authentication program.

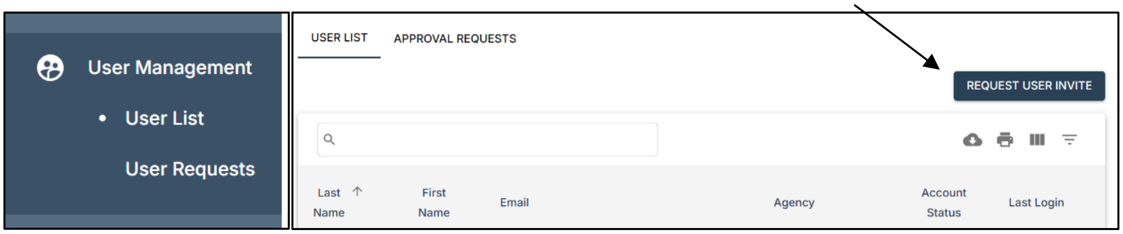
I don't want to download a multifactor authentication (MFA) app to my personal phone. Is there another option?

Yes! If you don't want to download an MFA app to your phone, you can download the Protecc computer program for Windows. Protecc is a free computer-based MFA program that allows you to verify your NC REEDS login attempts on your computer instead of your personal device. For more information on linking NC REEDS to Protecc, click this link for a video tutorial.

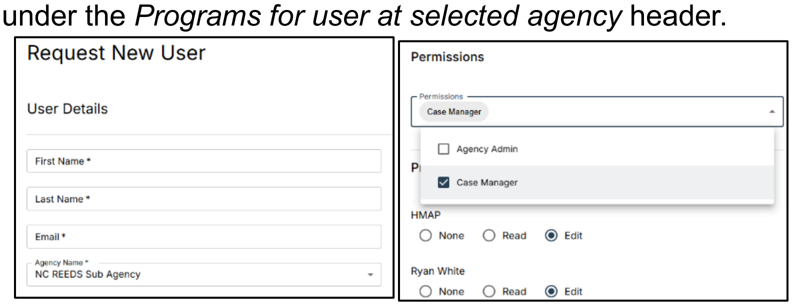
I have a new case manager at my agency that needs access to NC REEDS. How do I get them an account?

All agencies should have designated an administrator for their agency. Agency administrators have the ability to request new user accounts in NC REEDS. To request a new user account for your agency in NC REEDS, follow the steps below.

- Navigate to the User Management tab on the lefthand side of your NC REEDS screen. Click the Request User Invite button in the top right corner.
    - ***Please Note:*** Only agency administrators will have access to the User Management tab.



- Enter the user's credentials and permissions. For case managers, check Case Manager under the *Permissions for user at selected agency* header. Select Edit for Ryan White/HMAP under the *Programs for user at selected agency* header.



- Click the Submit button in the upper right hand side of the screen. An NC DHHS agency administrator will review and approve all new user requests.

- ***Please Note:*** If you do not have an agency administrator or do not know who your agency administrator is, reach out to NCREEDSHelp@dhhs.nc.gov for assistance requesting new users.

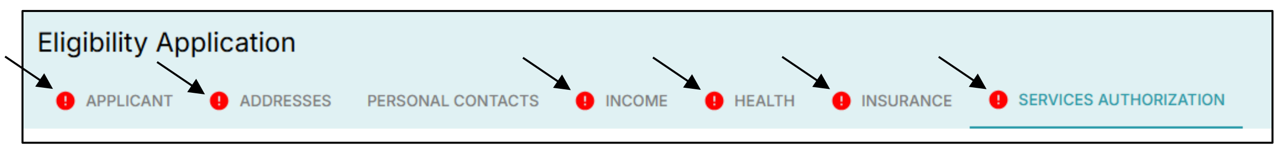
My link to set up my NC REEDS account doesn't work anymore. What do I do?

NC REEDS new user invitation links expire after 7 days. Contact your NC REEDS agency administrator or the NCREEDSHelp@dhhs.nc.gov email account to request a password reset link. When you reset your password, you will also need to reconfigure your multifactor authentication program.

Client Applications

NC REEDS gives me an error when I try to submit a client application. What do I do?

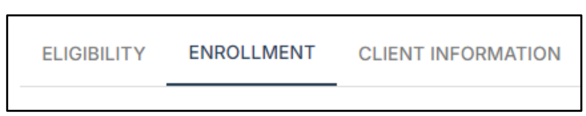
If NC REEDS is not allowing you to submit an application, review the application tabs to ensure you did not miss any of the required questions or documentation uploads. Missing required information will be highlighted by a red circle with an exclamation point right before the tab's name.



NC REEDS requires proof documentation in the income and addresses sections. If documentation was not uploaded in both sections, NC REEDS will not allow you to submit the application. NC REEDS will also block application submission if all required fields are not answered. All required fields are designated with an asterisk (*).

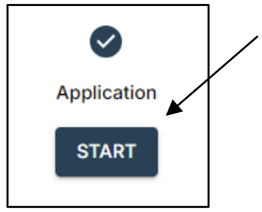
I searched my new client in the All Clients list and found a profile that already exists for them. What do I do?

If you find a client profile already exists for the client you are attempting to register, **do not register a new client profile for them**. Creating a duplicate client profile creates errors in NC REEDS that delays service provision and medication dispensing. Instead, click on the client's existing profile to check their enrollment history. To check the client's enrollment history, click on the Client Enrollment tab.



If the client is currently enrolled in HMAP and/or Ryan White Part B, you can proceed to update the client's information (i.e., changing your agency to the client's lead agency or adding an insurance update) by navigating to the Client Information tab. Add the updates and click Save. For more information on client updates, see the Client Updates section of this manual.

If the client is not currently enrolled in HMAP and/or Ryan White Part B, you can proceed to start a new application for them. To do so, navigate to their eligibility timeline and click the Start button under the Application header.

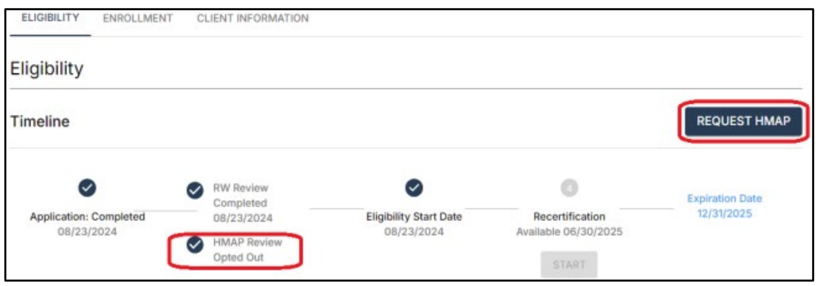


What do I do if my client does not have documentation for income or North Carolina residency?

There are documents available on the HMAP website to record extenuating circumstances that inhibit a client from having proof documentation for income and/or North Carolina residency. These include the Declaration of Residence Form, the No/Low Income Form, and the Income Signature Card. For more information on circumstances that permit submission of alternative documentation, see the HMAP Manual.

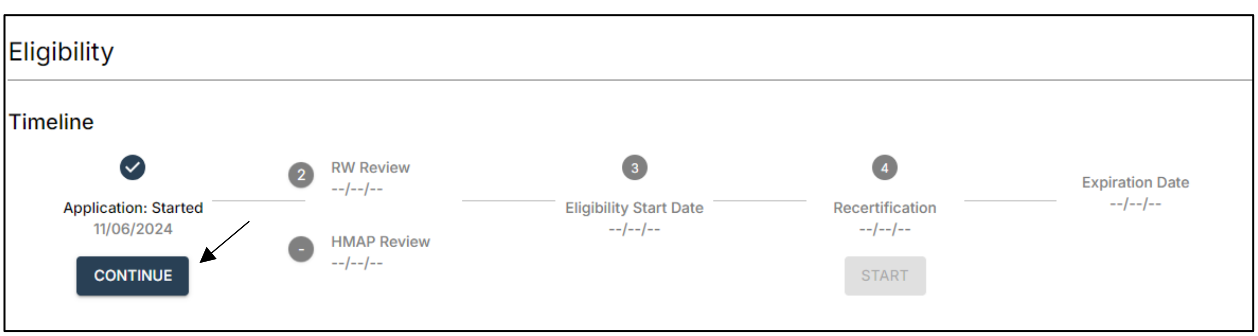
How do I request HMAP for a client currently receiving care-only services?

If your client is eligible for HMAP, you can click the Request HMAP button in the client's eligibility timeline to request the processors' review the client's application for HMAP enrollment. You will need to specify which subprogram the client is applying for. For more information on the HMAP subprograms, see the HMAP Manual.



Can I save an application and finish it later?

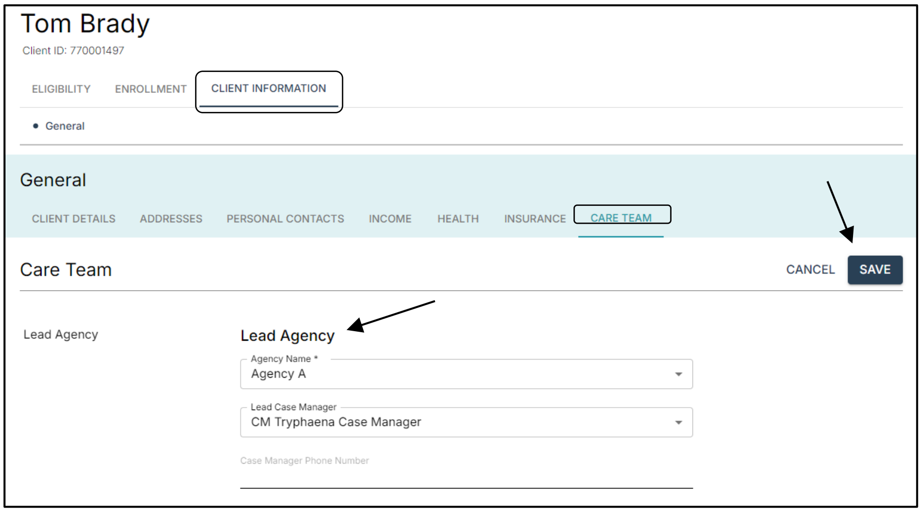
Yes! You can save an application and finish it at a later time by clicking the Save button in the top right corner of your page while you are in a client's application. Please note the application will not be submitted for processor review until all sections are complete and you click the Submit Application button. To return to an unfinished application, navigate to the client's eligibility timeline and click the Continue button under the Application header.



Please Note: If you start an application but do not submit it for processor review, the client's information will lock and cannot be updated by anyone at NC DHHS. For example, if a client enrolled in HMAP is found to have full coverage Medicaid and needs to be disenrolled from HMAP, the HMAP team will be unable to disenroll the client until their application has been completed and submitted.

How do I make myself the lead case manager for a client?

To make yourself the lead case manager for a client coming from a different agency, navigate to the client's profile and select the Client Information tab. Navigate to the Care Team subtab. Enter your name and your agency under Lead Agency. Click Save.



<u>Eligibility and Enrollment</u>

Will I get notified about my client's application status?

No, you will not be directly notified of your client's application status after it has been reviewed by the processing team. You can check your client's application status by navigating to their eligibility timeline and/or their program enrollment tab. For more information on checking your client's application status, see the Checking Client Application Status section of this manual.