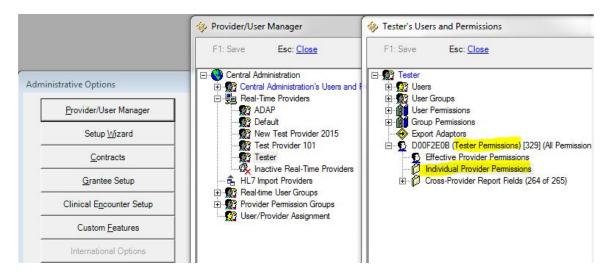
## **Eligibility History Instructions**

Eligibility Status is used to track the history of client's eligibility for RSR as the client becomes eligible and at times is deemed ineligible for Ryan White Services. This status will be used for RSR reporting and to determine if a client is eligible for Ryan White funded services.

## To grant Eligibility History permissions for a provider domain:

- 1. Log into the Central Administration domain.
- 2. Click Administrative Options.
- 3. Click Provider/User Manager.
- 4. Expand Real-Time Providers.
- 5. Right click the provider domain.
- 6. Click View Provider.
- 7. Expand Provider permissions. ("Name of Provider" Permissions)
- 8. Click Individual Provider Permissions.



- 9. Type elig in the text box to find the Eligibility permissions.
- 10. Right-click on one of the permissions.

- 11. Click Grant Section.
- 12. Click Save.

F1: Save Esc: Close	elig			
	↑ Permission		Permission Section	Permission Group
⊡-∰ Open Door Clinic ⊞-∰ Users ⊞-∰ User Groups	<ul> <li>Add/Edit Client Eligibility Records</li> <li>Delete Client Eligibility Records</li> <li>Edit Vital/Enrollment Status</li> </ul>	Grant	Status /Elizibility	Data Entry Data Entry Data Entry
	View Vital/Enrollment Status	Grant (	Section	Data Entry Data Entry Data Entry

Once these permissions are granted for the provider domain, users for that domain can be granted permission to access the Eligibility History menu.

F1: Save Esc: Close	elig			
,	1 Permission	Permission Section	• Permiss	Status
-]∰ Tester	Add/Edit Client Eligibility Records	Status/Eligibility	Data Entry	Granted
E 👷 Users	Selete Client Eligibility Records	Status/Eligibility	Data Entry	Granted
🕀 🥵 User Groups	Sedit Vital/Enrollment Status	Status/Eligibility	Data Entry	Granted
🗄 🕼 User Permissions	Several Stress View Eligibility History	Status/Eligibility	Data Entry	Granted
Group Permissions     Export Adaptors     D00F2E0B (Tester Permissions) [325     S Effective Provider Permissions     Individual Provider Permissions     D Cross-Provider Report Fields (26-	≪ View Vital/Enrollment Status	Status/Eligibility	Data Entry	Granted

## To add Eligibility History permissions for a user:

- 1. Log into the Central Administration domain/ provider domain
- 2. Click Administrative Options
- 3. Click Provider/User Manager
- 4. Expand Users
- 5. Expand the user name
- 6. Click Individual Permissions
- 7. Right click on the eligibility permission
- 8. Click Grant
- 9. Click Save.

Permissions for Eligibility Status in the Central Administration domain:

F1: Save Esc: Close	eligibility			
	1 Permission	Permission Section	Permission Group	Status
Central Administration Central Administration's Users and Permissions Central Administration's Users and Permissions CUTEMP (TEMP, CW) [222] (All Permission CENTRAL Sectors Control of Individual Permissions CENTRAL Sectors CENTRAL Sector	Sedit Client Eligibility Note List View Eligibility History View Vital/Enrollment Status	Eligibility Status/Eligibility Status/Eligibility	Administration Data Access Data Access	Granted Granted Granted

Permissions for Eligibility Status in the Provider domain:

F1: Save Esc: Close	eligibility			
	1 Permission	Permission Section	✤ Permission Group	Status
- 💽 Tester	Add/Edit Client Eligibility Records	Status/Eligibility	Data Entry	Granted
E g Users	Selete Client Eligibility Records	Status/Eligibility	Data Entry	Granted
E CWTEMP (TEMP, CW) [327] (All Permissions, Te	Sedit Vital/Enrollment Status	Status/Eligibility	Data Entry	Granted
5 Effective Permissions	♥View Eligibility History	Status/Eligibility	Data Entry	Granted
∰g Groups ∯ Individual Permissions ⊡∯ GRENDFOLS (Folsbogen, Gredlwist) [46]	≫View Vital/Enrollment Status	Status/Eligibility	Data Entry	Granted

## To add an eligibility record to the Eligibility History:

1. Click Find Client.



2. Type in a client's identifying information and click *Search*.

Enter search crite	ria. Partial matches will be included.
Last Name:	
Test	
First Name:	
Test	
Client ID:	
Unique ID	
Client UCI:	
View Active Clients Only	Maximum Results: 100

3. Click on the client's name and click *Details*.

Fest Test 999998 TSTS0101 ksHa∐+ob BA81AE82 Fest Test TSTS0101 5cYhpR9+R 9AE68EC4	

A client currently not eligible will have this listed in his or her Eligibility Status.

Client Delete Client		Find List	New Search	Close
IIV C&T Relations Custo	n Tab 1	Case Manger	Case Notes   M	ental Health
Enrollment Status:	Enr	ollment Date:	Eligibility St	atus
Active	]  1/1	/2014 -	Not Eligible f	or Ryan White
Vital Status:		Case Clo	osed Date:	Eligibility
Alive	•		•	History
HIV Status:	н	IV+ Date:	Est? AIDS	Date: Est
HIV-positive (not AIDS)	- 11	/4/2014 🔹		Γ
HIV Risk Factors:				
Injecting Drug Use				

4. Click Eligibility History.

e Client Delete Client		Find List	New Sea	arch	Close
HIV C&T Relations Custom	n Tab 1	Case Mange	r Case Notes	Mental	Health
Enrollment Status:	Enrol	Iment Date:	Eligibilit	y Status	X.
Active 👻	1/1/	2014	Not Eligit	ole for Ry	van White
Vital Status:		Case Cl	osed Date:	Eligi	LUCE.
		010110101010101010	and the second	Lingi	DIIIIY
Alive	•		•		tory
Alive HIV Status:		/+ Date:			tory
1		/+ Date: 4/2014 •		His	tory
HIV Status:				His	tory : Est

5. Click Add Record.

igibility History		-	and the local		
Eligibility Records	Search			0/0	
	↓ Date	Is Eligible	Funding Source	Ryan White	
F1: Add Record					
F2: Edit Record					
Del: <u>Delete</u>					
Esc: <u>Close</u>					

6. Enter the information in this form and click *Save*.

Date :	Funding Source:	ls Eligible:
1/1/2015	Part A	▼ Yes ▼
Comment :		
Client has bee	en eligible this year	
	Save	Cancel

These records can be edited by clicking *Edit Record*.

Eligibility Records	Search			1/1	
Eligibility Records	↓ Date	ls Eligible	Funding Source	Ryan White	
F1: Add Record	1/1/2015	Yes	Part A	Тгие	- 102
F2: Edit Record					
Del: <u>Delete</u>					
Esc: Close					

Once the Eligibility History is updated, the client's Eligibility Status will change.

Clients can be eligible for multiple funding sources. In this case, they would need separate Eligibility History records for each funding source they are eligible for. For instance, they may be eligible for Part A, which began on 2/1/2015, and Part C services which began on 3/1/2015. A separate Eligibility History record will have to be created for each funding source and date.

The date span in which they are Ryan White Eligible determines which services count for RSR reporting. If they receive a Ryan White funded service before or after an eligibility period, that service will not count toward the RSR report for them, with the exception of Outpatient Ambulatory services. If a client is eligible for Outpatient Ambulatory services any time during the RSR report year, all Outpatient Ambulatory Services will be included in the RSR. For all other services, they are only counted if the service has a service date during the time frame the client is eligible for any funding source.

Client Delete Client		Find List	New Search	Close
IV C&T   Relations   Custo	om Tab 1	Case Manger	Case Notes   Ment	al Health 🔳
Enrollment Status:	Enro	Ilment Date:	Eligibility Statu	IS
Active	- 1/1/	2014 🔹	Ryan White Elic	jible
Vital Status:		Case Clo		<u>qibility</u>
Alive	-	1	L H	<u>istory</u>
l				
HIV Status:	н	V+ Date:	Est? AIDS Da	<b>te:</b> Est
		V+ Date: /4/2014 •	Est? AIDS Da	te: Est
HIV Status:			Est? AIDS Da	