

Standard Operating Procedure (SOP)

Task:	Six Month Self-Attestation	SOP No.	02
Revision Date:	February 2017	Policy Reference No.	RWPB -02
Description:	To maintain eligibility for the Idaho Ryan White Part B medical case management and AIDS Drug Assistance Program (ADAP) services, clients must recertify every six months. The recertification process ensures that an individual meets the residency, income, and insurance eligibility requirements.		
Responsibility:	Idaho RWPB/ADAP Coordinator, RWPB & RWPC Medical Case Managers		
Frequency:	During client's six month recertification month		
Process Steps: Notification	<ol style="list-style-type: none"> 1. At least sixty days before the end of the six-month recertification period, the MCM should mail/email/or call the client to remind them of their due date for their six-month recertification 2. The MCM should coordinate the following: <ol style="list-style-type: none"> 2.1. Sending client the six-month self-attestation form or completing the form with client over the phone 2.2. Obtain any copies of documentations if there are changes to a client's previously reported status during their annual or intake paperwork 2.3. Send the state RWPB MCM/ADAP coordinator a copy of the completed form and any supporting documents if changes occurred through secure email or fax 		
Process Steps: CAREWare	<ol style="list-style-type: none"> 3. The RWPB MCM must complete the following updates in CAREWare for each client: <ol style="list-style-type: none"> 3.1. If a client moved, update the Demographic tab with any changes to address 3.2. Add the service 1102 in the Service Tab with the date the six-month recertification was completed 3.3. Update the Annual Review tab with the date the six-month recertification was completed for both insurance and income even if there were no changes. 3.4. Update case notes as needed 4. The Idaho RWPB/ADAP coordinator will complete the following updates in CAREWare for each record received: <ol style="list-style-type: none"> 4.1. Add a service in the Service Tab when the six-month recertification is received by the state 4.2. Check to ensure the MCM updated the service tab and annual review tab were updated with the date the six-month recertification was completed 4.3. Check the six month form to determine if the address was updated on the demographic tab if there was a change in residency 4.4. Update the State Fields tab in CAREWare to reflect the next time the six month recertification is due, this entails updating the year to the next year (a recertification received in 2017 will involve updating this field to 2018) 4.5. Contact the MCM if there are any changes that need to be made in CAREWare or missing paperwork 		
Process Steps: Signature	<ol style="list-style-type: none"> 5. The six-month recertification can be completed by a client and sent to the agency or a MCM can complete the form over the phone with the client. <ol style="list-style-type: none"> 5.1. In person self-attestations must be signed by the client 5.2. Six month self-attestation forms completed over the phone with a case manager must include the MCM signature 5.3. At the next in-person service completed by the client, a client signature should be included on the form and kept in the MCM client records, an update form does not need to be submitted to the state office 		
Process Steps: Client Files	<ol style="list-style-type: none"> 6. The MCM must place a copy of the six month recertification form along with any supporting documentation if there were changes to the client's file 7. The Idaho RWPB/ADAP coordinator will add a copy of the six month recertification form and any supporting documentation to the client's file 		