Streamlining Eligibility for the Ryan White HIV/AIDS Program

Technical Expert Panel Executive Summary

Background: Streamlining Eligibility for the Ryan White HIV/AIDS Program Technical Expert Panel

The Health Resources and Services Administration (HRSA) HIV/AIDS Bureau (HAB), which administers the Ryan White HIV/AIDS Program (RWHAP), convened a two-day Technical Expert Panel (TEP) in August 2023. The TEP on streamlining eligibility for the RWHAP explored the following topics:

- Supporting RWHAP eligibility access through policy

- Facilitating and expediting RWHAP eligibility and confirmation through collaboration

- Facilitating RWHAP eligibility and confirmation processes and access to services through technology

- Measuring client experience

- Enhancing access to data for RWHAP recipients

- Determining technical assistance needs of recipients

The first day of the TEP focused on the AIDS Drug Assistance Program (ADAP) and RWHAP Part B and included 12 representatives from six state health departments who perform various roles in RWHAP Part B service delivery, including ADAP. Representatives from NASTAD also participated. The second day included more than 20 participants from across the RWHAP Parts A–D.

The TEP participant discussions will inform the future work of HRSA HAB, RWHAP recipients, and partners by identifying potential policy changes, collaborative opportunities, and technical assistance and training needs. TEPs are non-advisory and consultative in nature only.

The Health Resources and Services Administration's (HRSA) Ryan White HIV/AIDS Program (RWHAP) eligibility determinations and confirmations are a critical aspect of access to care for RWHAP-eligible people with HIV who are newly diagnosed, those clients currently in care, and those clients who are no longer in care and need to be re-engaged. A streamlined process that is easy for provider staff and clients facilitates maintaining clients in care, re-engaging clients back into care, and connecting newly diagnosed individuals to the care and support services they need. Policies and procedures for determining and confirming RWHAP eligibility also affect nearly all recipient activities—from administration, case management, and information technology (IT) to other services, such as client navigation.

In October 2021, the HRSA HIV/AIDS Bureau (HAB) released _Policy Clarification Notice 21-02: Determining Client Eligibility & Payor of Last Resort in the Ryan White HIV/AIDS Program_. This policy clarification notice (PCN) is intended to reduce administrative and client burden while enhancing continuity of care to ensure that clients have access to the medical and support services they need to reach viral suppression and improve HIV health outcomes. PCN 21-02 requires that confirmation of eligibility be conducted within a reasonable time frame, as set by RWHAP recipients' policies and procedures, to identify any changes in a client's income or residency status.

Since its release, HRSA HAB has learned from recipients about the successes and challenges in implementing PCN 21-02. Some recipients are leveraging the flexibility provided by the PCN to facilitate access to RWHAP services through innovative approaches. Other recipients have found aspects of implementing the PCN to be challenging.

Key Lessons Learned to Streamline Eligibility Determinations and Confirmations

During the Technical Expert Panel (TEP) discussions, participants identified the following key lessons related to streamlining eligibility determinations and confirmations:

- **Time Frames.** Changing the eligibility confirmation time frame has resulted in benefits for some recipients. These include, but are not limited to, decreased staff time in processing applications; decreased burden on clients; quicker turnarounds and approvals; and increased enrollment and decreased numbers of clients being disenrolled.

- **Data.** Access to and effective use of data, especially through establishing and maintaining data-sharing agreements, remain challenging for multiple reasons. Recipients could benefit from help in identifying other data sources that contain key information for confirmation, such as residency and income verification.

- **Cross-Parts Collaboration.** This work presents opportunities to explore work across RWHAP Parts and jurisdictions to align eligibility determination requirements (e.g., confirmation dates).

- **Technology.** Smart phones, tablets, mobile applications (apps), and online portals can help engage clients in care and support their remaining in care.

- **Technical Assistance.** Recipients, subrecipients, and clients could benefit from technical assistance and education on eligibility best practices.

Supporting Eligibility Access Through Policy

TEP participants noted that they appreciated the flexibility provided by PCN 21-02 in terms of (1) changing requirements related to the six-month recertification of eligibility, (2) facilitating coordination of eligibility dates across recipients in the jurisdiction, and (3) reducing the burden on clients by providing flexibility related to acceptable documentation. TEP participants emphasized that recipients' decisions on policies and procedure changes resulted from careful consideration of their unique circumstances.

Much of the discussion about the flexibility provided by the PCN focused on confirmation of eligibility and how recipients can now determine the time frame that works best for their clients. Some of the recipients represented in the TEP have chosen to maintain the six-month time frame, while others have extended it. Those who maintained the six-month time frame emphasized the benefit of having regular contact with clients and those who extended the time frame often have other processes in place, such as regular reviews of client eligibility by providers, to ensure ongoing contact and that eligibility status does not change.

Supporting RWHAP Eligibility Access Through Policy

TEP participants identified the following policy facilitators, benefits, and challenges to eligibility access.

Facilitators

- Share information with providers and clients about changes in eligibility determination and confirmation processes and how to navigate these changes.
- Streamline documentation processes (e.g., self-attestations, use of patient portals to allow clients to update information).
- Involve planning and advisory bodies and other stakeholders, including clients, in decisions related to changing determination and confirmation policies and processes.

Benefits

- Longer time frames result in fewer applications for recipients to process, which allows them to focus on other issues, such as adherence and engagement in care.
- Flexibility allows recipients to determine a time frame that is most beneficial for their clients.

Challenges

- Documenting insurance status and income, regardless of whether information is obtained directly from clients or from other data sources.
- Maintaining contact with and updating residency information for clients who move frequently, especially when they move to a new jurisdiction, such as a state or an eligible metropolitan area (EMA).
- Addressing concerns about the risk of reimbursing the RWHAP for the cost of medications and medical care for clients who lose eligibility (e.g., due to income change).

Other Policy Issues

While discussion on the recertification time frame was the major point of focus, TEP participants identified additional policy issues. TEP participants understood the limitations imposed by RWHAP-authorizing legislation and federal grants policy; however, they encouraged HRSA HAB to explore additional flexibilities to support eligibility-related activities (e.g., use of grant funds to support integration of data systems and for the purchase of devices for clients, such as tablets and phones, to support access to and engagement in care). Participants also suggested that HRSA HAB continue to work with federal partners (e.g., Centers for Medicare and Medicaid Services [CMS]) and state-level officials and agencies to facilitate data sharing.

Supporting Eligibility Access Through Collaboration

Collaboration was a key topic discussed during the TEP because it is critical to the streamlining of processes, integration of data, adoption of technology, and effective provision of technical assistance. TEP participants focused on two types of collaboration that facilitate eligibility activities: (1) collaboration across the RWHAP community (i.e., recipients, planning groups, advisory bodies, technical assistance providers) and (2) collaboration with other stakeholders (e.g., state agencies).

Cross-RWHAP Part collaborations can improve coordination of services at the state and local levels, especially when Part A EMAs include multiple states, counties, and cities. The streamlining of processes, such as having all RWHAP Parts A- and B-funded providers in a state use the same eligibility criteria and forms, can facilitate the application and eligibility process for both providers and clients.

Data collaborations were identified as critical to streamlining eligibility-related activities and many other activities that support engagement and retention in care, the provision of high-quality services, and improved health outcomes. These activities often include non-RWHAP entities. For example, some jurisdictions have successfully obtained data from other state agencies, such as Medicaid to verify income and the state's motor vehicle department to verify residency. TEP participants noted that careful attention must be paid to privacy concerns and that both identifying the right "gatekeepers" who can provide access to necessary data and establishing data sharing agreements can be time consuming.

Supporting Eligibility Access Through Technology

In addition to data collaborations, TEP participants identified other ways that technology can support eligibility access. Online portals and apps can streamline communications and access for staff and clients. Clients can submit information for their application or recertification through these portals and apps. Portals and apps also allow staff to send reminders to clients about recertification or other issues related to their eligibility (e.g., Medicaid redeterminations). TEP participants noted that when technology is adopted, both staff and clients require training in the use of this technology and that some clients may not have internet access or may prefer not to use the technology.

Technical Assistance Opportunities

TEP participants identified technical assistance needs related to RWHAP eligibility and confirmation processes. They noted that various levels of technical assistance may be required—from beginner to advanced—especially if the technical assistance focuses on complicated issues that require that the assistance be tailored to the recipient, as in the effective use of technology. TEP participants also noted that other sources of technical assistance are available, such as NASTAD for RWHAP Part B recipients.

As noted previously, TEP participants discussed the training needs of recipient staff, including frontline workers, and how this training should be conducted on a regular basis due to staff turnover. Training is critical when launching a new data system or integrating existing data systems. TEP participants recommended that HRSA HAB explore how subrecipients can benefit from technical assistance activities, whether provided directly by HAB, HAB-supported technical assistance providers, or Parts A and B recipients.

TEP participants also identified possible opportunities to enhance technical assistance that RWHAP Parts A and B recipients provide within their jurisdictions. For example, annual (or more frequent) cross-Part meetings were suggested, possibly with support from the regional RWHAP Part F AIDS Education and Training Center Program.

Technical Assistance Methods

- Disseminate best practices online and through technical assistance webinars
- Create a repository of eligibility-related resources
- Support opportunities for peer learning (e.g., learning collaboratives, mentoring)
- Present this topic during the 2024 National Ryan White Conference on HIV Care & Treatment
- Develop sample eligibility manuals
- Host jurisdiction-specific trainings developed by regional RWHAP Part F AIDS Education and Training Centers
- Promote other sources of technical assistance, such as NASTAD (RWHAP Part B and AIDS Drug Assistance Program services) and the Access, Care, and Engagement Technical Assistance Center (access to health insurance)

Conclusion

RWHAP eligibility determinations and confirmations can affect access to care for RWHAP-eligible people with HIV, whether they are newly diagnosed, in care, or need to be re-engaged in care. In addition to the flexibility provided by PCN 21-02, HRSA HAB is supporting a RWHAP Part F Special Projects of National Significance Program initiative focused on linking eligibility across RWHAP Parts. The initiative will examine current eligibility determination and confirmation processes in place across all RWHAP Parts and identify administrative, technical, and legal barriers facing providers and clients. It also will identify best practices and facilitators, develop and disseminate resources, and support peer-to-peer exchange. Access to care has always been the focal point of the RWHAP, and the program will continue to evolve to meet the needs of people with HIV.