



KAREN L. SMITH, MD, MPH  
Director and State Health Officer

State of California—Health and Human Services Agency  
California Department of Public Health



EDMUND G. BROWN JR.  
Governor

**OFFICE OF AIDS  
HIV Care Program**

**Management Memorandum  
Memorandum Number 15-07**

October 13, 2015

TO: HIV CARE PROGRAM (HCP) CONTRACTORS

SUBJECT: CLIENT ELIGIBILITY RECERTIFICATION and SELF-VERIFICATION

**I. Purpose**

The purpose of this Management Memo is to clarify the requirements regarding client eligibility recertification and the use of a self-verification process.

**II. Background**

Health Resources and Services Administration (HRSA) policy notice 13-02 states that to maintain eligibility for Ryan White services, clients must be certified for eligibility upon initial intake and thereafter recertified at least every six months. The primary purpose of the recertification process is to ensure that an individual's residency, income, and insurance statuses continue to meet program eligibility requirements and to verify that the RWHAP is the payer of last resort. (<http://hab.hrsa.gov/manageyourgrant/pinspals/pcn1302clienteligibility.pdf>)

**III. Policy**

Annual Recertification

Once a year, whether defined as a 12-month period or a calendar year, a client must be recertified. The process includes obtaining copies of supporting documentation certifying the client's eligibility based on residency, income and insurance status and placement of those documents in the client's record. The annual recertification must take place in-person.

Recertification Once Every Six Months

At least six months after an initial intake or annual recertification an additional recertification must take place and noted in the client's record. To ease the burden on the client, this recertification can be done through the use of a self-verification process. Providers can develop a self-verification form that clients sign, date and return to the provider attesting either; 1) no changes to their income, residency or insurance statuses since their enrollment or last recertification, or; 2) changes have occurred and provide copies of supporting documentation. For example, a self-attestation of changed residency could include a copy of a utility bill displaying the new address. Self-verification forms can be mailed to the provider.

## Management Memo 15-07

Page 2

If a contractor allows use of a self-verification process, providers must still follow all guidelines regarding vigorously pursuing comprehensive healthcare coverage per [Management Memo 14-01](#).

### Lapsed Recertification

Providers should have reminder systems in place to assist with contacting clients who are nearing their 6-month or annual recertification to ensure that they do not lapse. Once a client has lapsed on their recertification, they cannot receive services until their eligibility recertification has been completed. Providers must document in the client record all steps taken in pursuit of completing the recertification process with the client.

It is not necessary to disenroll clients in the AIDS Regional Information & Evaluation System (ARIES) if they lapse on their recertification. OA recommends contractors have a system in place to conduct follow-up with clients who do not recertify to ensure they have not encountered an interruption in care services. These types of retention and reengagement follow-up activities can be budgeted under the Outreach service category.

Pursuant to California Health and Safety Code Section 38077(b)(2), CDPH/OA contractors shall implement the above referenced modifications to the HIV Care Program Scope of Work.

If you have questions, please contact your Care Program Advisor. Current Care Program Advisor assignments are located on the OA website:

<http://www.cdph.ca.gov/programs/aids/Documents/11MAD3cCareAdvisors.pdf>

Sincerely,



Ayanna Kiburi, MPH  
Chief, HIV Care Branch  
Office of AIDS  
California Department of Public Health