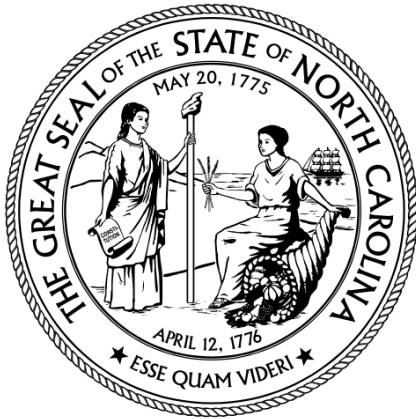


# North Carolina Ryan White Electronic Eligibility Solution (NC REEDS) Case Manager Manual, Updated April 2026



## NC DEPARTMENT OF **HEALTH AND HUMAN SERVICES** Division of Public Health

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## ***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 a New Agency 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 administrator and case manager 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.

For additional support or if your agency would like to gain access to NC REEDS, please request access by contacting [NCREEDSHelp@dhhs.nc.gov](mailto:NCREEDSHelp@dhhs.nc.gov) and providing your first name, last name, and agency name.

## **NC REEDS Agency Administrator Accounts**

Each agency in REEDS must complete the Agency Administrator Form for at least two Agency Administrators who will manage NC REEDS user access at their agency. Agency Administrators are responsible for creating and approving new user accounts while monitoring user account activity. They will be updating the NC REEDS permission roles and maintaining the proper user account access within their agency. Agency Administrators are required to deactivate users when they are on temporary leave and delete user accounts for anyone who left their agency or no longer needs access to NC REEDS. These responsibilities are to ensure proper access control and to ensure compliance with NC REEDS User management requirements.

Agency Administrators will complete the Agency Administrator Form once a year and submit it to [NCREEDSHelp@dhhs.nc.gov](mailto:NCREEDSHelp@dhhs.nc.gov) prior to the deadline. All new Agency Administrators will have to complete and submit the Agency Administrator Form within 30 days of becoming an Agency Administrator. Please contact the [NCREEDSHelp@dhhs.nc.gov](mailto:NCREEDSHelp@dhhs.nc.gov) to request the Agency Administrator form.

## **User Account Management**

NC REEDS Agency Administrators are responsible for creating new user accounts for their staff. NC REEDS users must use their work email address provided by their agency, if that is not possible, please reach out to [NCREEDSHelp@dhhs.nc.gov](mailto:NCREEDSHelp@dhhs.nc.gov) to request assistance before adding the new user.

One Agency Admin will create the new account on the User Management tab, once submitted the second Agency Admin will approve the new user request on the Approval Request tab located on the User management page.



- **Creating a New User Account**

- The Agency Admin will create the new account on the user management tab by clicking the Request New User button.



- The Agency Admin will fill in the new user's information under User Details. Note that if an email address is already in NC REEDS, it CANNOT be used again.

A screenshot of the 'Request New User' form. The form has a title 'Request New User' at the top. Below the title is a section titled 'User Details' containing four input fields: 'First Name \*' with the value 'Peter', 'Last Name \*' with the value 'Parker', 'Email \*' with the value 'PeterParker@officialweb.org', and 'Agency Name \*' which is a dropdown menu currently showing 'Agency A'.

- After adding the agency from the drop-down list, a new section will appear with Permissions and Programs. Click on the Permission drop down to select the roles the new user should be assigned, the Agency Admin role and/or the Case Manager role.

- Under Programs, select Edit for both the HMAP program “Enrollment Access” and the Ryan White program “Enrollment Access”

Permissions

Permissions  
Agency Admin Case Manager

Programs

HMAP

Care Management Access  
 None  Read  Edit

Enrollment Access  
 None  Read  Edit

Ryan White

Care Management Access  
 None  Read  Edit

Enrollment Access  
 None  Read  Edit

- Click on the SUBMIT button on the upper right of the Request New User page to submit the new user request

Request New User

User Details

CANCEL SUBMIT

● **Approving a New User Account**

- The second Agency Administrator will log into NC REEDS and find the user request located in the User Management tab under the Approval Requests tab.

User Management

USER LIST APPROVAL REQUESTS

Q Search Text

Approve/Deny	Request	Submitted Date	User Last Name	User First Name	User Email	Account Status	Requested By	Approve/Deny Date
START REVIEW	New User(Agency Admin,Case Manager) at Agency A	02/24/2026	Kent	Clark	clark.kent@dhhs.nc.gov	Pending	Case Manager2@dhhs.nc.gov	

Rows per page: 10 1-3 of 3

- Click Start Review and review the user information, permissions, and program access. If all the information is correct, then click the Approve button.

Update User Request

User Details

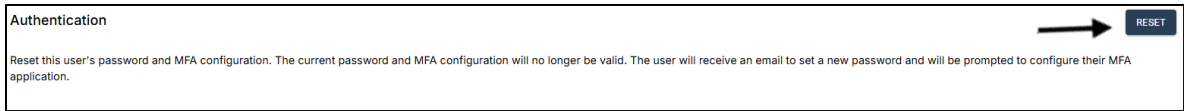
Submitted 02/24/2026 By: Agency Admin 1, Agency A

← ALL USERS

× DENY ✓ APPROVE

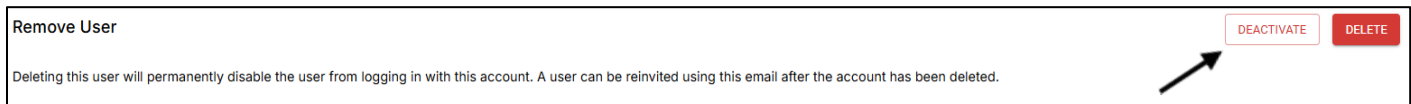
- **Resetting User Account Authentication**

- NC REEDS Agency Administrators will assist their users in resetting their passwords and secondary authentication methods when needed, including after re-activating a user's account.
- Agency Admins will need to reset their accounts by selecting reset on the user's details page after clicking on the user in the User Management's User List.



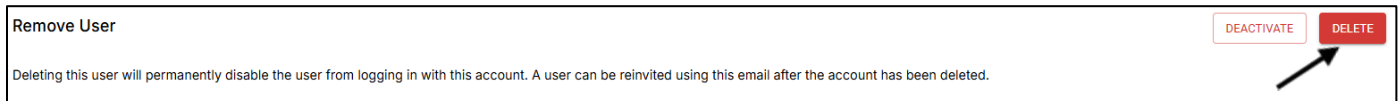
- **Deactivating User Accounts**

- NC REEDS Agency Admins must deactivate user accounts when their staff takes a leave of absence. Agency Admins will select the deactivate button in the users account and when the user comes back, their account can be activated.



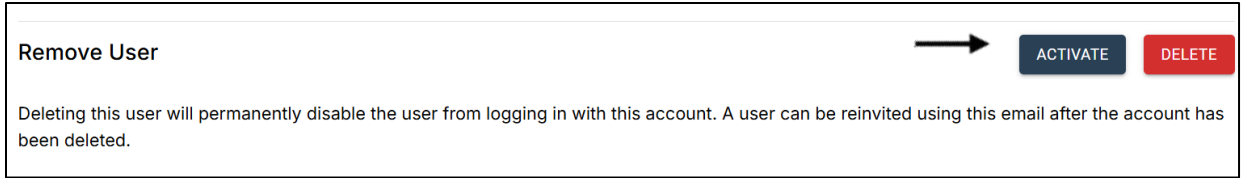
- **Deleting User Accounts**

- NC REEDS Agency Admins are to delete users when they leave the agency or when the user no longer needs access to NC REEDS. Agency Admins can select delete on the user account to permanently remove them from NC REEDS.
- New accounts can be created with previously used emails as long as the previous account has been deleted.
- Note that accounts that are deactivated for 365 days will be automatically deleted by NC REEDS.

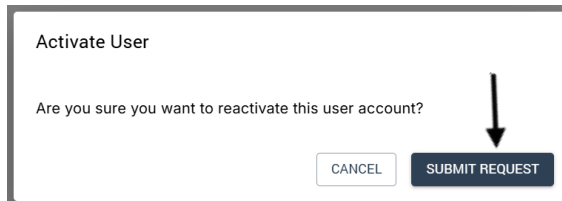


- **Reactivating User Account**

- All NC REEDS accounts are automatically deactivated if the user has not logged into the system for 90 days. Deactivated accounts are automatically deleted from NC REEDS after 365 days.
- Agency Administrators can reactivate accounts by navigating to the User Management section's User List tab, search for the user or find them in the table, click on the user's information, then scroll down to the bottom to see the Remove User header, and click the Activate button.



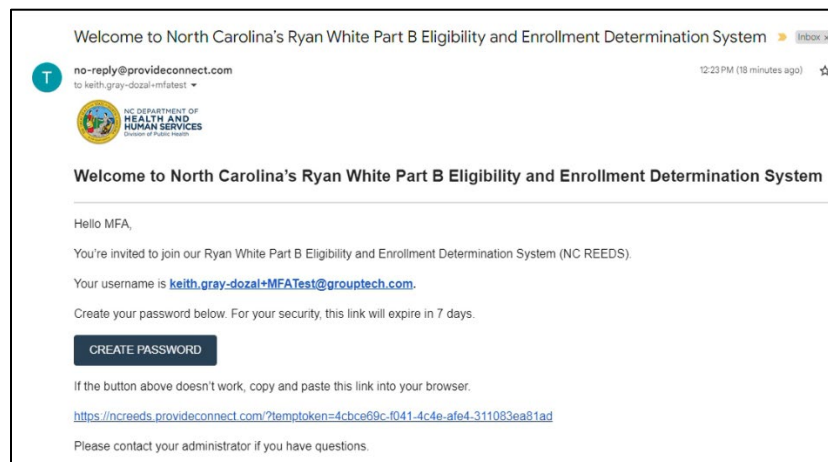
- The Activate User pop up will appear, click Submit Request to complete this action.



- After clicking to Activate the user's account the second Agency Administrator must approve the re-activation by going to the Approval Requests tab of User Management, click Start Review, and then click Approve. This is the same process as described in the Approving a New User Account section above.
- Agency Administrators must reset the newly activated account's secondary authentication as well.

### **NC REEDS New User Accounts**

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 choice 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.

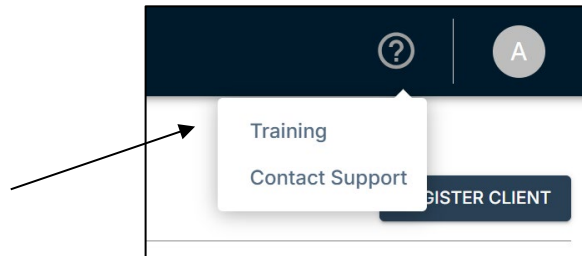
The table below provides additional resources for configuring different MFA methods to NC REEDS and recommended MFA apps.

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.	<p>Download Protecc: <a href="#">Protecc - 2FA Authenticator TOTP - Free download and install on Windows   Microsoft Store</a></p> <p>Recorded tutorial to link Protecc to your NC REEDS account: <a href="#">IL RWB Case Management Training - Module One: Program Overview   Provide Enterprise® by Groupware Technologies</a></p>
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.	<p>Download Microsoft Authenticator for IOS: <a href="#">Download Microsoft Authenticator - Microsoft Support</a></p> <p>Download Microsoft Authenticator for Android: <a href="#">Download Microsoft Authenticator - Microsoft Support</a></p> <p>How to link Microsoft Authenticator to NC REEDS account: <a href="#">How to add your accounts to Microsoft Authenticator - Microsoft Support</a></p>
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.	<p>Download Duo Mobile for IOS: <a href="#">Duo Mobile on the App Store</a></p> <p>Download Duo Mobile for Android: <a href="#">Duo Mobile - Apps on Google Play</a></p> <p>How to link Duo Mobile to your NC REEDS account: <a href="#">Third-Party Accounts - Guide to Two-Factor Authentication · Duo Security</a></p>
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.	<p>Download Google Authenticator for IOS: <a href="#">Google Authenticator on the App Store</a></p> <p>Download Google Authenticator for Android: <a href="#">Google Authenticator - Apps on Google Play</a></p> <p>Google Authenticator FAQs: <a href="#">Google Help for 2-Step Verification - Google Account Help</a></p>

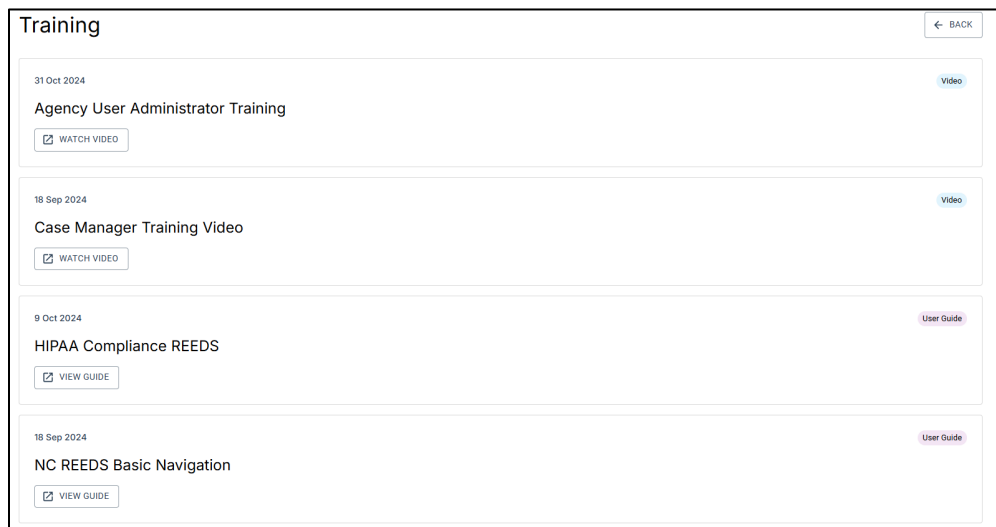
### **NC REEDS User Guides and Training Videos**

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.



The Trainings available to each user will coincide with the user's permissions and roles in NC REEDS.



### ***Submitting a New Client Eligibility Application in NC REEDS***

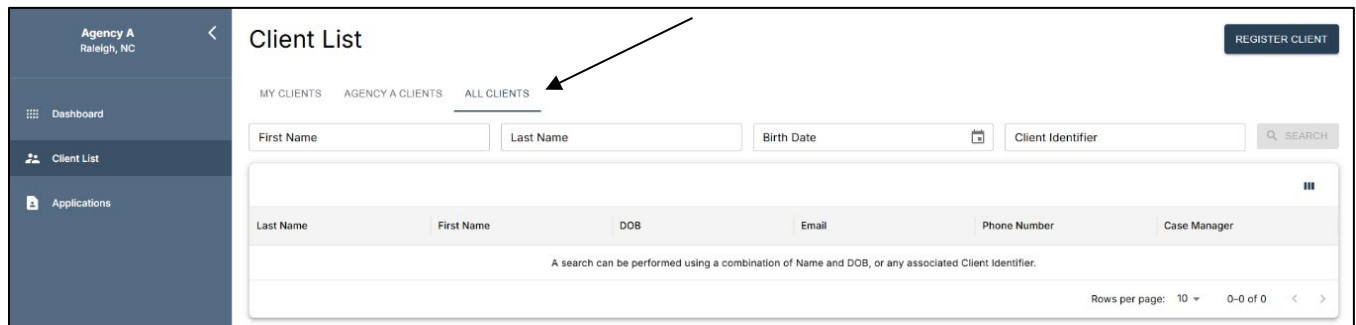
The following section describes how to complete the eligibility application for new clients (i.e., clients that are not currently enrolled in HMAP or Ryan White care-only services).

#### **Searching for 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 ensure 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**

- After searching for the client in NC REEDS, if the case manager does not identify that the client is already in the system, they can proceed to create a new client profile via registration. 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 (\*).
- **Please Note:** If your client has a valid social security number it must be added to the client's information in NC REEDS. If your client does not have a social security number, please do NOT enter a social security number into NC REEDS; please select No as the response to the "Does the client have a social security number?" question and indicate the reason why from the drop-down list once it appears.

**Register Client**

Client Details CANCEL SAVE

---

Basic Information

First Name \*

Middle Initial

Last Name \*

Name Suffix

Preferred Name

Date of Birth \* Age:

Does the client have a social security number? \*

Yes  No

- 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 by clicking on it and complete the client’s application in the client’s existing profile.
- If the case manager determines this is not a duplicate client, proceed with creating the new client profile by clicking the Confirm New Registration button.

**Potential Duplicate Detected**

Client may already exist. Check the 'Existing Records' list below to see if you see the client you intended to create is present. If not, and this client is indeed a unique new client, click the 'Confirm New Registration' button to continue and create the new client record.

Your Entry

First Name	Last Name	SSN	DOB
Emil	Blonsku		02/10/1992

**CONFIRM NEW REGISTRATION**

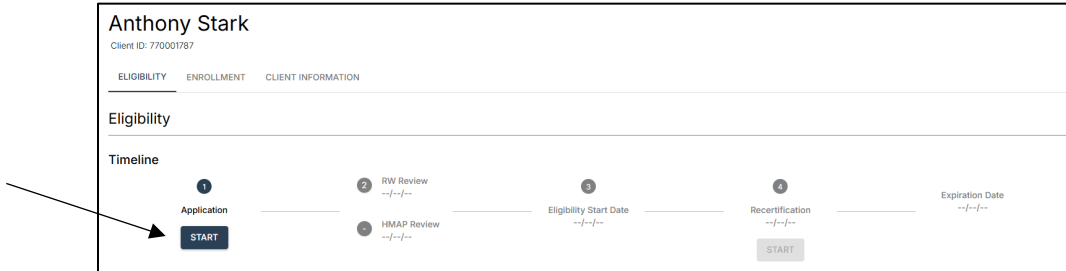
Existing Records

If you see the client you intended to create in the list below, click on that client to use the existing record instead of your entry.

First Name	Last Name	SSN	Agency	Created By	DOB
Emil	Blonsku		Agency A	meghan.furnari@dhhs.nc.gov	02/10/1992

### Starting the Eligibility Application

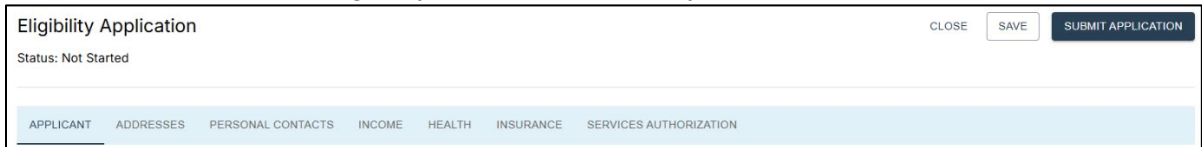
- After registering and saving a new client profile in NC REEDS or after selecting an existing client in NC REEDS, the system will automatically open to the client’s eligibility timeline. All client applications will be initiated in the client’s eligibility timeline. To begin the application, click the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



- Case managers can open the client’s eligibility timeline at any point by searching for 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 for 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 your client has a valid social security number, it must be added to the client’s information in NC REEDS. If your client does not have a social security number, please do NOT enter a social security number into NC REEDS; please select No as the response to the “Does the client have a social security number?” question and indicate the reason why from the drop-down list once it appears.
  - If the client does not have an email address, add the email address you use to access NC REEDS to the required Email Address field for the client.
- 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.

Urgent Application

Is Client's application urgent?

Urgency Types

- High Viral Load
- Jail
- Loss of Job/Employer Insurance
- Pending Jail Discharge
- Pregnant
- Rapid ART
- Recent Move to the State

### **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.

APPLICANT ADDRESSES PERSONAL CONTACTS INCOME HEALTH INSURANCE SERVICES AUTHORIZATION

Housing Status **Housing Status**

Primary Address

Secondary Address

Documentation

Housing Status \*  
Stable/Permanent

Housing Type \*

**Primary Address**

Address \*

Apt / Lot / Floor

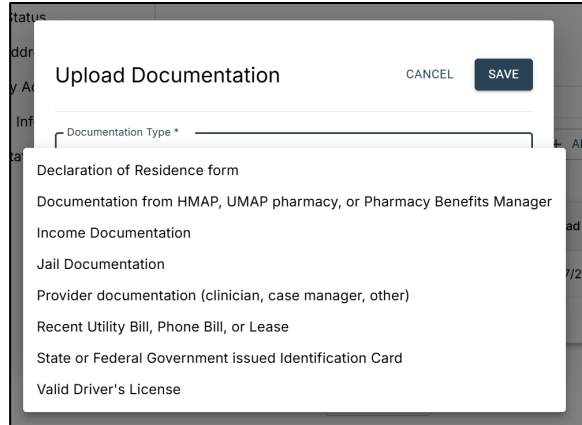
City \*

State \*  
NC

Zip Code \*

County \*

- 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.
- Select the type of documentation using the drop down and selecting the best option. Once the type of documentation has been selected, then upload the documentation. NC REEDS accepts PDF, PNG, and JPG files.



- Once the documentation type has been selected, either click inside the Click to Upload section of the pop-up and follow the instructions to select the file to upload or drag and drop the file into the Click to Upload section of the pop-up.
- Once the file you want to upload appears in the Upload Documentation pop up click Save in the upper right-hand corner to save the uploaded file to the client's record.

### **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 by 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.

Client's Personal Income

Does the client have personal income? \*

Yes  No

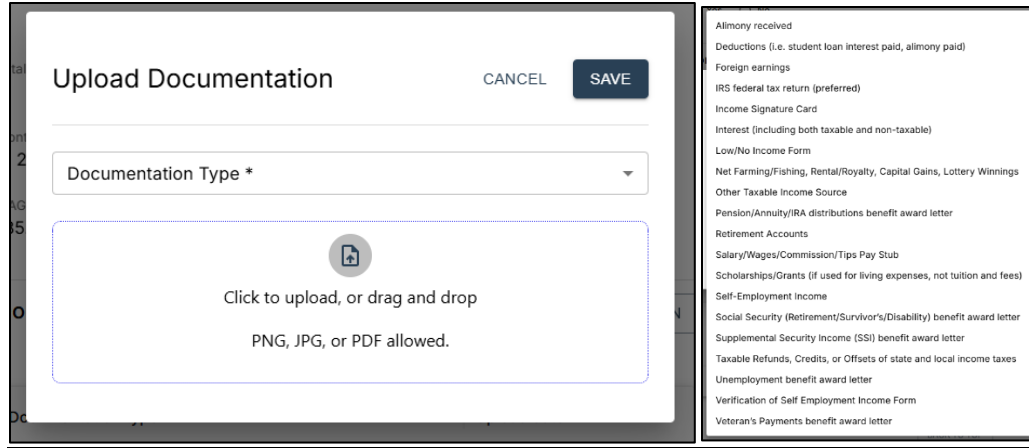
- Each source of income must be added using the Add Income Source button and completing all fields therein.
- When entering income sources for the client, the case manager will be required to identify the income source type (e.g., Salary/Wages/Commissions/Tips, Social Security, Unemployment benefits, 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, and it must be recent (within 60 days). 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 (first name, last name, and relationship to the applicant), 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.).

- If the client has no documented income or income at or below 125% FPL, 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.

Income Totals
<b>Ryan White</b>
Household Size 1
Monthly Household Modified Adjusted Gross Income (MAGI) \$ 2604.00
MAGI Household Poverty Level % 195.79 %

- Case managers are required to enter documentation verifying the client's income source(s). Documentation must be recent (within 60 days of submitting the application/update). 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.) by selecting one of option in the Documentation Type drop down. For more information on acceptable income documentation, see the HMAP Manual which can be found on the [HMAP website](#).



- Once the documentation type has been selected, either click inside the Click to Upload section of the pop-up and follow the instructions to select the file to upload or drag and drop the file into the Click to Upload section of the pop-up.
- Once the file you want to upload appears in the Upload Documentation pop up click Save in the upper right-hand corner to save the uploaded file to the client’s record.

**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.
  - For HIV Status **do not** select Preliminary Positive as that status will not allow an applicant to be approved for Care or HMAP coverage.

- Proof of HIV Status: Case managers are required to certify the client is living with HIV. Please share the “Terms and Conditions” that are available for download from the application with your client. 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.

**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**

- The Insurance subtab collects information on the client’s enrollment in health insurance programs, such as ACA Marketplace coverage, Medicare coverage, and Medicaid coverage.

**Private Plan Coverage/ACA Marketplace**

- As of 2026, Case Managers are required to refer clients to the NC Navigators Consortium to enroll in both PCAP and ICAP during Open Enrollment. Post Open Enrollment, Case Managers can enroll clients in ICAP but will be notified to refer the client to the NC Navigators Consortium. This will ensure the client is on the best insurance and subprogram for their needs. Clients interested in PCAP are required to meet with a Navigator in all instances.
- 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.

**Private Insurance**

Private Insurance	Private Insurance Status * Active
Dental Insurance	Date Effective * 12/01/2024
Vision Insurance	Policy Source * ACA Exchange
Medicare Part A, B, C or D	Insurance Company Name * Blue Cross and Blue Shield of NC
Medicaid	Plan Name * Blue Local Silver Choice A   3 Free PCP   \$15 Tier 1 Rx   with Atrium Health
Subsidies	Medical Coverage? No
Documentation	Mental Health Coverage? No
	Substance Abuse Coverage? No
	Pharmacy Coverage Included? No
	Private Member ID
	Premium Amount * \$ 0.00
	Premium Payment Frequency * Monthly

## Medicare

- Case managers are responsible for complementing the Medicare section by identifying the client’s Medicare coverage type then filling in all the required fields and any relevant follow-up information listed.
  - If the client is applying for SPAP and they have a Medicare Advantage plan, please indicate that the client has Medicare Part C.

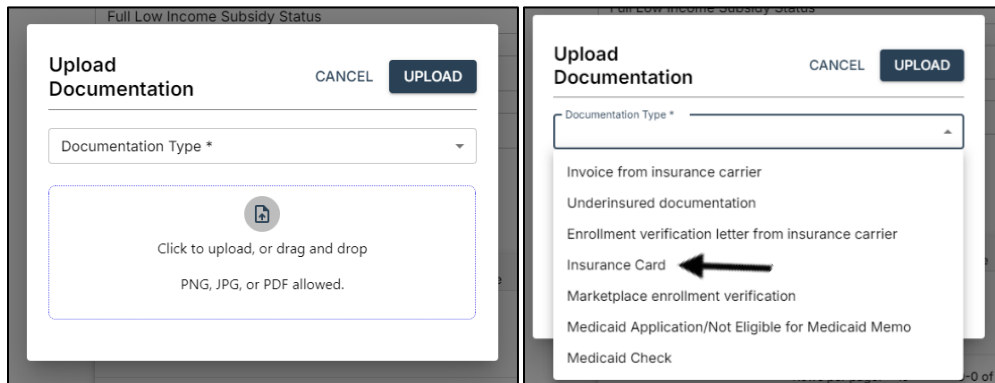
- If the client is applying for SPAP and they do not have a Medicare Advantage Plan/Medicare Part C then their Medicare Part D status must be documented by completing all the required fields and all relevant follow-up information listed.

## Medicaid

- Complete the Medicaid section of the Insurance tab with the required and relevant information.
- All RW Part B and HMAP applicants/clients with income at/below 140% FPL who are not enrolled in a Medicare Part D Plan or Medicare Advantage Plan are required to complete and upload the “Medicaid Documentation Form” available on the HMAP Website. The form serves as proof that the client has been screened for Medicaid eligibility and either applied for Medicaid or was determined to be ineligible for Medicaid within the last three months. The form must be signed within 30 days of the submission of the application.
- To upload insurance documentation, navigate to the bottom of the insurance subtab and select the Add Documentation button. Click the Documentation Type dropdown and select “Medicaid Application/Not Eligible for Medicaid Memo” as the type, click in the box to upload the file or drag and drop the file into the box to upload it, then click the Save button.

## Insurance Documentation

- 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. Click the Documentation Type dropdown and select “Insurance Card” as the type, click in the box to upload the file or drag and drop the file into the box to upload it, then click the Save button.



- 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 Subtab

- Once all required eligibility information and documentation have been entered into the client’s application via 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 appears 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?”

HMAP Enrollment

Does applicant wish to apply for HMAP? \*

Yes    No

- 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.

APPLICANT
ADDRESSES
PERSONAL CONTACTS
INCOME
HEALTH
INSURANCE
SERVICES AUTHORIZATION

---

Ryan White Eligibility      **Ryan White Eligibility**

HMAP Enrollment

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

**HMAP Enrollment**

Does applicant wish to apply for HMAP? \*

Yes    No

Choose Subprogram \*

ICAP (Qualified Health Plan - Copay only)

PCAP (Full Premium and Copay)

SPAP (Medicare Part D)

UMAP (Uninsured/Underinsured)

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

HMAP Enrollment

Does applicant wish to apply for HMAP? \*

Yes    No

- 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.

Eligibility Application CLOSE   SAVE   **SUBMIT APPLICATION**

Status: Started

---

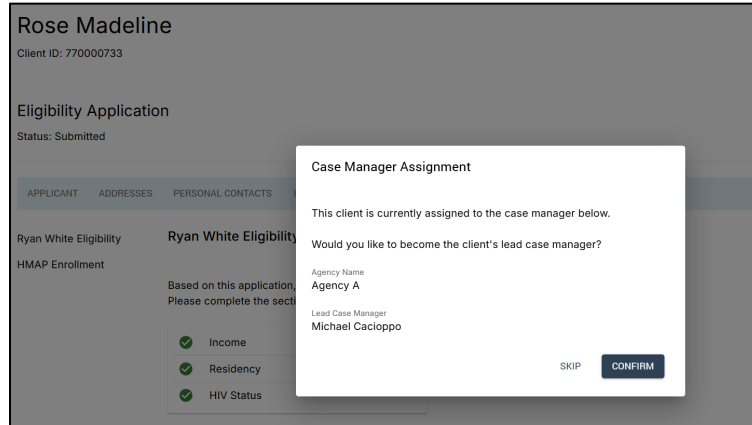
APPLICANT
ADDRESSES
PERSONAL CONTACTS
INCOME
HEALTH
INSURANCE
SERVICES AUTHORIZATION

- 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).

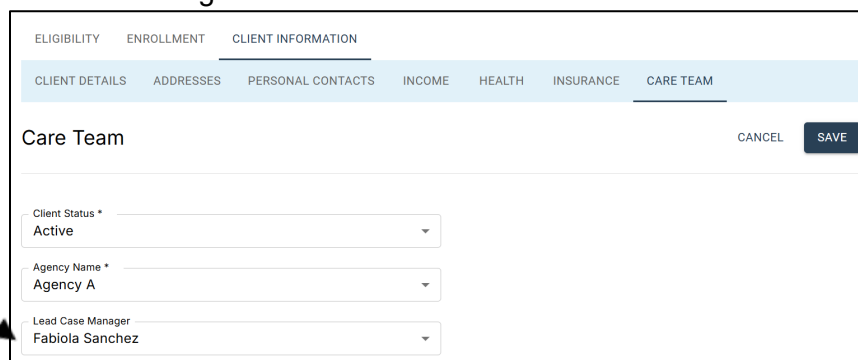
<
ADDRESSES
PERSONAL CONTACTS
INCOME
! HEALTH
INSURANCE
! SERVICES AUTHORIZATION
HISTORY
>

### Care Team Subtab

- **All active clients must have a Lead Case Manager assigned in NC REEDS.** When a case manager completes the application and submits it, they are automatically assigned as the lead case manager, or they may be prompted via a pop up in NC REEDS asking if they should be assigned as the client's Lead Case Manager.



- Lead Case Manager assignments can be changed after an application is submitted or at any other time by going to the client's Care Team tab.
- Case Managers can easily access their assigned clients via the My Clients tab in the Client List section of NC REEDS.
- Only agency users such as Case Managers can assign Lead Case Managers to clients. NC DHHS staff do not have this capability. Case Managers will be asked to help whenever an active client is missing their Lead Case Manager assignment in NC REEDS.
- If a case manager leaves the agency, then agency administrators and staff are responsible for changing the lead case manager assignment for all impacted clients to another case manager at their agency in NC REEDS.
  - **Switching Lead Case Managers**
    - On the client list, enter the identifying information to find the clients application. After finding it, open the application and go to the Client Information tab and select the Care Team page.
    - On the Care Team page, the client status and the care team information will be listed. Under the Lead Case Manager portion, open the drop-down list and select the case manager that would be taking over as the lead case manager for this client. Then select Save.



### **Client Status**

All clients who are currently eligible for Ryan White Part B services and those who are enrolled in HMAP will have a status of Active in NC REEDS. Some clients will be automatically marked as inactive, such as those whose address is outside of North Carolina, whose HIV status that is negative or indeterminant, and clients who have had no actions in NC REEDS since October 1, 2024.

All active clients will be listed in the assigned lead case manager’s “My Clients” or the assigned agency’s “Agency’s List” on the Client list page.

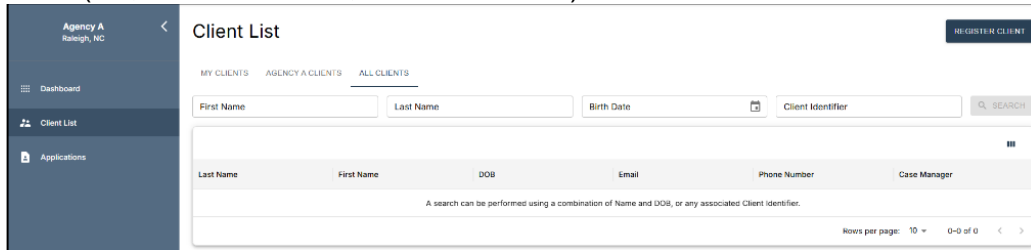
- A client’s status can be updated on the Care Team page located in the Client Information tab.
- Change the client status from Active to Inactive, and then select the reason from the drop-down menu. If the reason isn’t stated, then select Other and add a comment to required comment box.
- If a client is currently eligible for Care Only and/or Enrolled in HMAP, or if the client has an update or application that is in progress, then their status cannot be changed from Active to Inactive manually.
- A client’s status will be automatically changed from Inactive to Active in NC REEDS when a new application is started.

The screenshot shows a section titled "Care Team" with a form. The "Client Status \*" dropdown menu is open, showing the current selection "Inactive". Below it, the "Inactive Reason \*" dropdown menu is also open, displaying a list of options: "HIV Negative", "Incorrectly Registered", "Lost to Care", "Over Income", and "Other". A red exclamation mark icon is visible next to the "Inactive Reason \*" dropdown, indicating a required field. The form is enclosed in a black border.

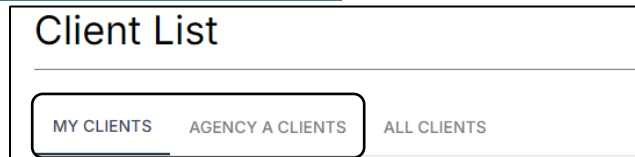
### Client Eligibility Timeline

Case managers can check the status of a client’s application by navigating to the client’s eligibility timeline in the client’s record in NC REEDS.

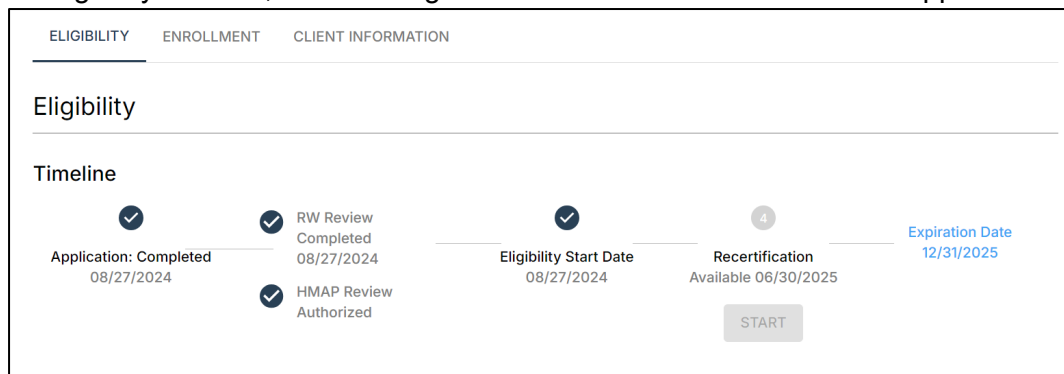
- To access the eligibility timeline, navigate to the client’s record by searching for their identifiers (i.e., name and DOB, or case number) in the Client List’s All Clients tab.



- For easier access, case managers can quickly find any client assigned to their agency under the My Agency subtab in the Client List page.
- 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.

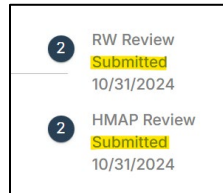


- In the eligibility timeline, case managers can track the status of a client’s application.

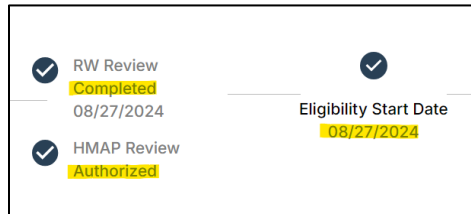


- The eligibility timeline contains the following information:
  - Application:** Indicates the date the case manager completed and submitted the client’s application.
  - RW Review/HMAP Review:** Indicates the date the processors reviewed and authorized the client for services.
  - Eligibility Start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

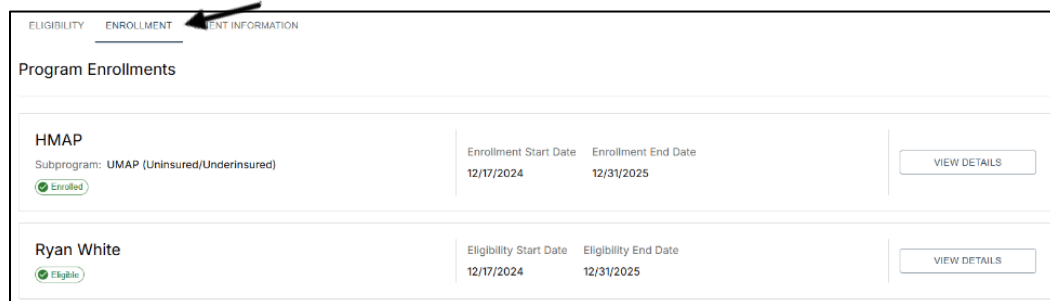


- Case managers can also review recent and previous applications submitted to Ryan White and HMAP.
  - By selecting View, case managers can review the application in detail.

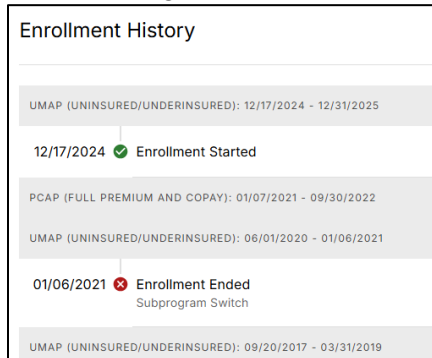
Application History

App Identifier	Type	Status	Started Date	Last Updated Date	Started By	Submitter	Action
198301	New	Completed	02/17/2026	03/13/2026	Fabiola Sanchez	Fabiola Sanchez	<a href="#">VIEW</a>

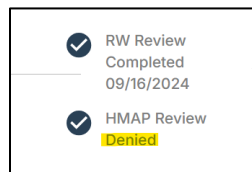
- Case managers should also verify the client’s enrollment HMAP by navigating to the Enrollment tab in client’s file.



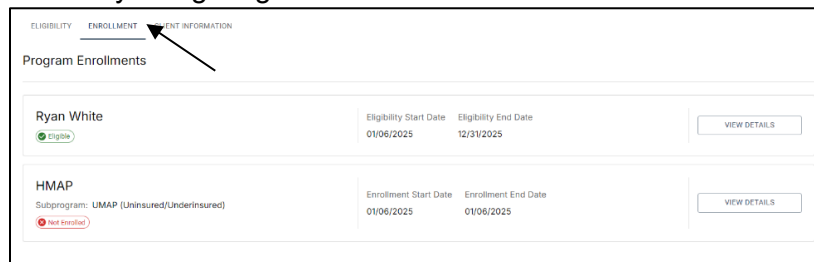
- In the enrollment tab, case managers can see the client’s current HMAP enrollment, future HMAP enrollment periods, and HMAP enrollment history by clicking the View Details button to expand enrollment program details and enrollment history



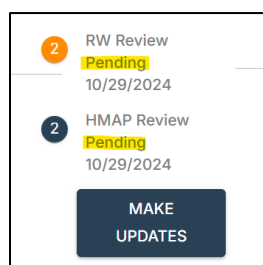
- If a client was denied HMAP services, this will be indicated in the eligibility timeline under Ryan White/HMAP Review. In the example below, the client was authorized for Ryan White care services but denied from HMAP.



- 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.

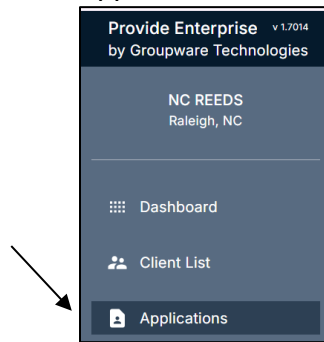


- If a client’s application was Pended, this will be indicated on the eligibility timeline under Ryan White/HMAP Review.
  - The case manager can select the Make Updates button to open the client’s application and identify why the processors pended the application. For more information on pended applications,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



## Applications Section

- Case managers can also check the status of a submitted application that has not had a determination by navigating to the Applications section.



- The Applications section includes two subtabs:
  - All Applications:** Contains all applications submitted by your agency.
  - Assigned To Me:** Contains all applications started or submitted by the user.
- 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 have not yet submitted.
- The client's application status will be indicated under the Status header in the Applications page.

Applications

ALL APPLICATIONS ASSIGNED TO ME

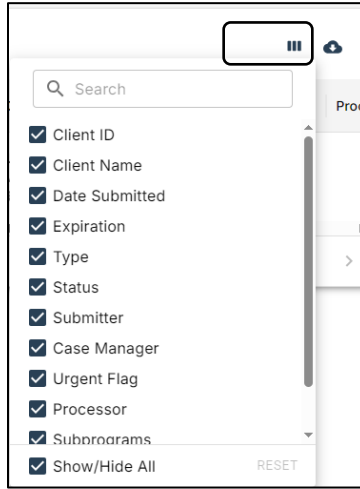
Search Text

Client ID	Client Name	Date Submitted	Expiration	Type	Status	Submitter	Case Manager	Urgent Flag ↑	Processor	Subprograms	Application
770001411	Test, Application	10/04/2024 94 days	--	New	Submitted	Agency A Michael Cacioppo	Agency A Michael Cacioppo			UMAP (Uninsured/Und erinsured)	VIEW

- 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.

Status	Status	Status	Status
In Review	Pending	Submitted	In Progress

- 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.



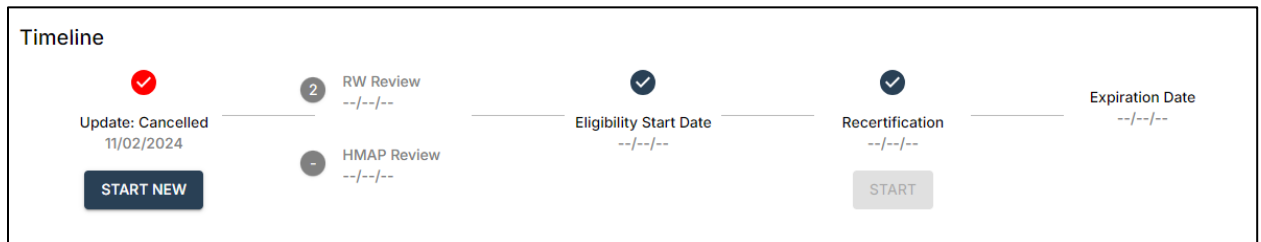
- Please Note:** Once a client’s application has been approved or denied, it will no longer show up in the Applications tab. To check the client’s application status after the application has been approved or denied, navigate to the eligibility timeline in the client’s file. For more information on navigating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

### ***Pended Applications***

The Ryan White/HMAP processing team may pend applications for several reasons. The most common reasons applications are pended include needing additional/correct 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 processor and returned to the case manager for updates.**

Pended applications that have not been resubmitted by the case manager after 30 days will be automatically cancelled in REEDS. 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.

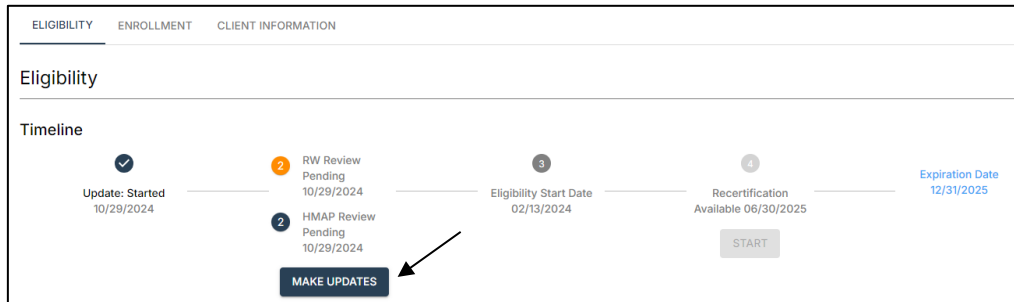


Pended recertification applications unresolved after 30 days will also require a new recertification application to be completed and submitted. Clients will not be recertified through the next Ryan White/HMAP coverage period unless the case manager submits a new recertification application for the client.

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.



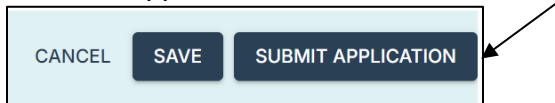
- Once the case manager clicks the Make Updates button, the section(s) needing update(s) will be indicated with a red circle and exclamation point.



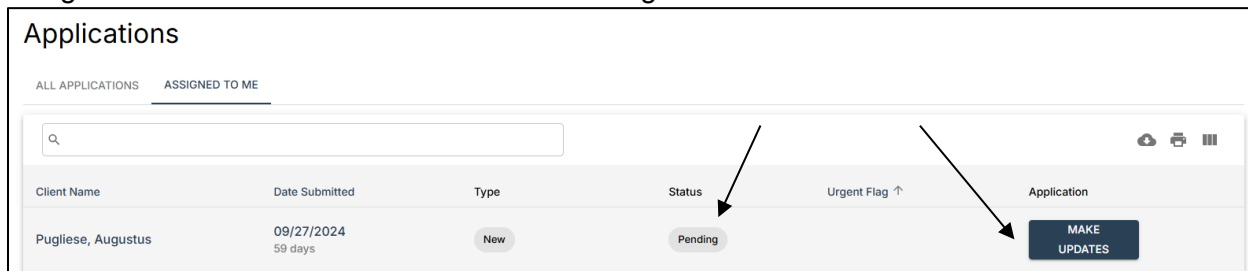
- Navigate to the section(s) requiring update(s) and review the processor comments for more details on the requested changes.
- Case managers can resolve comments after satisfying the processor requests by clicking the Resolve Comment button. If case managers need more information from the processor, 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 for the client's identifiers in the search bar in 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.



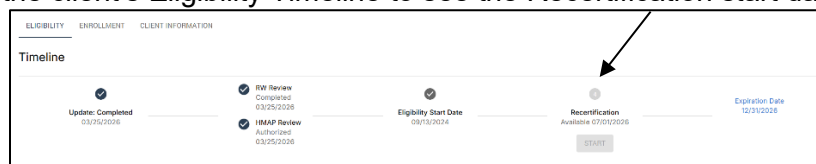
- Case managers can select the Make Updates button under the Application header to reopen the client's application and identify the sections that need updates.
- For more information on checking the status of a pended application once it has been resubmitted, see the [Checking Client Application Status](#) 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](#).

#### Important Tips Before Beginning the Recertification Process

- All new Care Only and HMAP clients (UMAP, SPAP, ICAP, PCAP) enrolled *before* July 1, must recertify to continue their coverage through the end of the following calendar year. Navigate to the client's Eligibility Timeline to see the Recertification start date.



**Please Note:** The Start button under the Recertification label will turn blue starting on 7/1 and will remain blue until the client's recertification application has been started.

- Clients who do not recertify will lose coverage after **December 31 of this year**.
- New clients who enroll *on or after* July 1, will be approved through **December 31 of next year** and do not need to recertify until next recertification period.

### Submission Process

- All applications must be submitted via **NC REEDS** by Case Managers.
- For eligibility Criteria and required documentation, please see the HMAP Manual located on the [HMAP website](#).
- Most supplemental forms (declaration of residency, no/low income, income signature) must be dated on or after July 1, must be signed less than 60 days from the time of submission, and must be uploaded to the application in NC REEDS.
- The Medicaid Documentation Form must be dated on or after July 1, must be signed less than 30 days from the time of submission, and must be uploaded to the application in NC REEDS. This applies to clients whose income is 140 % FPL and below.
- When submitting a recertification application for a current HMAP client, on the Services Authorization tab please select the client's current HMAP Subprogram (UMAP, SPAP, ICAP, PCAP).

### Late Applications

- Submissions after Sept 30<sup>th</sup> are considered late and could impact a client's ability to enroll in ICAP or PCAP the following year.
- All recertification applications not approved by December 31 will be canceled automatically in NC REEDS.

### Key Documentation Reminders

- Use the most recent IRS 1040 or acceptable income proof (e.g., pay stubs, SSI letter).
- The Medicaid Documentation Form is required for clients with income at or below 140% FPL.
  - **Please Note:** Complete and submit the Medicaid Documentation Form provided on the [HMAP website](#). Please be sure to complete the entire form, if incomplete then the application will be pended back to the case manager.
- The No/Low Income form is required for all clients/applicants with income at or below 125% FPL.

### Services Authorization Tab

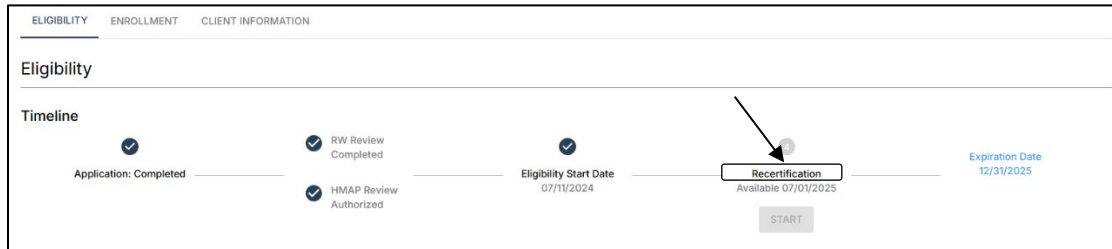
- Be sure to select "Yes" to apply for HMAP and select the current subprogram.
- **Please Note:** Selecting "Care Only" will submit the application to the Ryan White/Care Only processing queue. If the client is on HMAP and their recertification application is submitted as Care Only this will result in the client being **terminated** from HMAP.

### ICAP/PCAP clients during Recertification

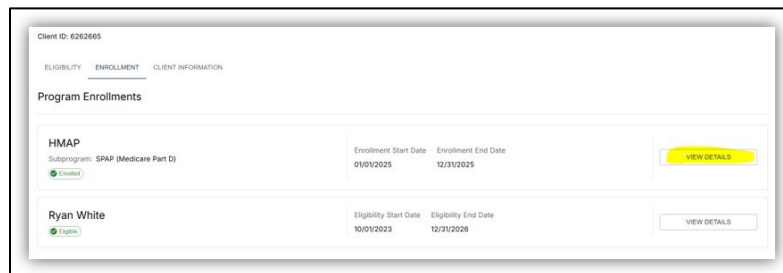
- When HMAP staff approve a recertification application for a current ICAP or PCAP client, the client will be assigned to UMAP for the upcoming calendar year until they meet with the NC Navigators and enroll in ACA coverage for the new plan year.
- ACA open enrollment for the upcoming calendar year generally begins November 1.
- After a client enrolls in an ACA Marketplace plan, they will have a future switch from UMAP to ICAP or PCAP once the insurance update is submitted by the NC Navigator who assisted the client with their ACA Marketplace enrollment.
- HMAP will host a webinar prior to open enrollment each year.

**Submitting a Recertification Application**

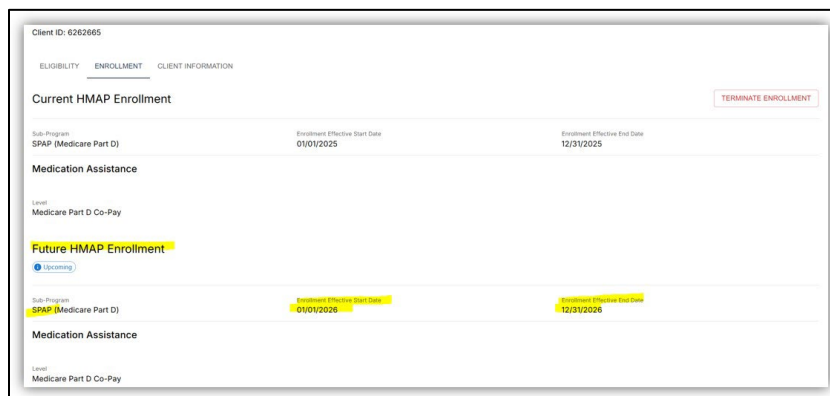
- Case managers can check when a client’s recertification application can be started by navigating to the eligibility timeline in the client’s file.
- To access the eligibility timeline, navigate to the client’s file by searching for their identifiers (i.e., name, DOB, and/or case number) in the Client 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 blue Start button underneath the Recertification header to begin the client’s new 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 the required documentation (within the past 60 days) to successfully complete the application.
- **Please Note:** When a recertification application is complete, case managers can review a client’s subprogram end date going to the Enrollment tab, then “View Details” under the HMAP header.



- After clicking the “View Details” button, case managers will see “Future HMAP Enrollment” located below the client’s current HMAP enrollment.



- Case managers can navigate between the eligibility application subtabs to update and complete the client's application.
- For more information on completing the eligibility application, see the section of this manual.
- **Please Note:** If a case manager starts but does not submit a recertification application, the client's information tabs will be locked until the application is completed and submitted by the case manager. The application will not be reviewed by the processing team until it has been submitted.
- **Please Note:** If a recertification application has not been approved by the end of the current enrollment period (December 31<sup>st</sup>) then starting January 1, a new application will need to be started for the client.

### Client Updates

Case managers are required to notify the Ryan White/HMAP processors whenever there has been a change in their client's 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.

#### Submitting a Client Update in NC REEDS

- Navigate to the client's file by searching for their identifiers (i.e., name, DOB, and/or client ID) in the Client List's All Clients tab.
- 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.).

#### Updating a client's Name and/or DOB fields

If the client's name fields or date of birth need to be updated that must be done before starting an application. If the client's Client Details tab is locked for editing, please contact [NCREEDSHelp@dhhs.nc.gov](mailto:NCREEDSHelp@dhhs.nc.gov) for assistance as an application/update will need to be cancelled to make this update.

- To change the client's name fields, select "Client Details" subtab
  - Click on the applicable name field and type in the client's correct name.
    - The client's first name and last name fields must be completed with the client's legal names as they appear on the documentation you provided in the client's application.



### Documentation for Updates

- Certain updates require documents to be uploaded to the documentation section of the subtab. They will be reviewed by the processors to confirm the new updates.
- The following subtabs require updated documentation:
  - Client Details (such as proof of name change)
  - Addresses
  - Income
  - Insurance
- 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.



Deceased

Is Deceased?

Death Date \*

Cause of Death \*

- 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.
  - If the update does not impact the client's eligibility, the client's tabs will not be locked.



⚠ Update in progress, fields are locked.

**Housing Status**

Housing Status

Stable/Permanent

- For updates requiring processor review, case managers can check the status of the update's information submitted 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 first 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.
- You may submit more than one update at a time if needed.
- **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.

### ***Incarcerated Clients in need of HMAP services***

Individuals incarcerated in a local detention center may be eligible for 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. Each detention center must have a current Financial Statement of Need on file with the NC HMAP program before submitting applications to HMAP. 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](#).

For any questions, please contact the please [NCREEDSHelp@dhhs.nc.gov](mailto:NCREEDSHelp@dhhs.nc.gov) with your first name, last name, and detention center, and all other applicable information.

### **Financial Statement of 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 approval 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 each calendar year. Each local detention center is required to provide a new Statement of Financial Need. 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 not current. To verify whether your facility has a current Statement, contact Iris Girard at [NCHMAPJail@dhhs.nc.gov](mailto:NCHMAPJail@dhhs.nc.gov).

## ***Completing the Eligibility Application for Clients in Jail***

The following section describes how to complete the eligibility application for clients who are currently in a local detention center. Once you have verified there is a current Statement of Financial Need on file with the NC HMAP program you may submit applications for clients incarcerated at your facility.

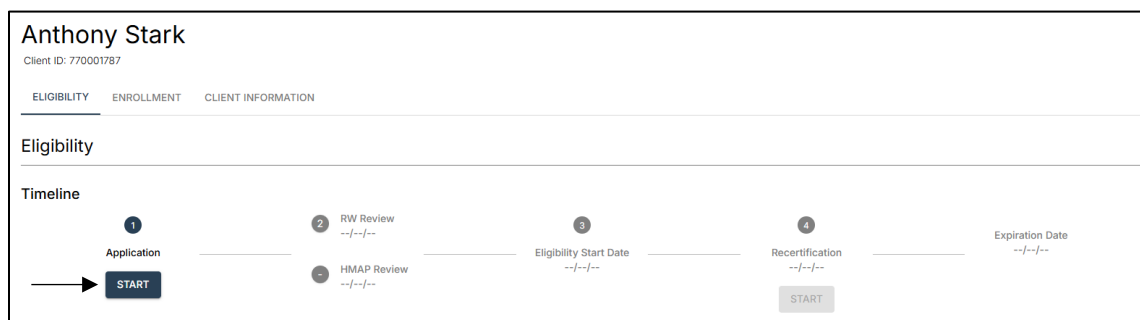
### **Searching a Client and Checking For an Existing Record**

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 ensure 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 is not already 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 for an Incarcerated Client**

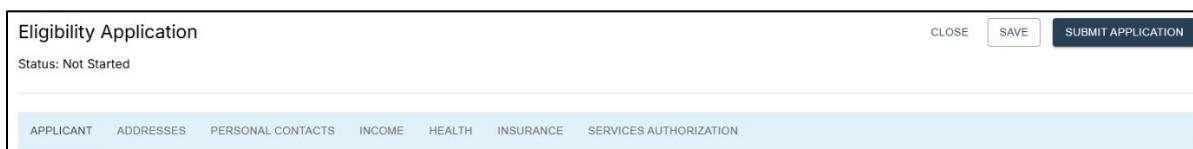
- After registering and saving a new client profile in NC REEDS or after selecting an existing client in NC REEDS, the system will automatically open to the client’s eligibility timeline. All client applications will be initiated in the client’s eligibility timeline. To begin the application, click the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



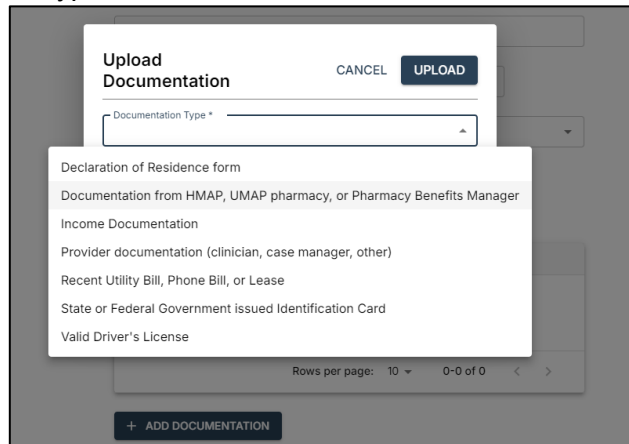
- Once in the eligibility application, NC REEDS will open into the Applicant subtab. Several fields will automatically populate based on the information recorded when the client was registered (e.g., name, date of birth, gender identity).
- Complete all required fields in the applicant subtab.
  - While 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, their housing status should be changed to unstable. The housing type should be marked as “Jail or local detention facility”. Then the incarceration start date must be completed.
- 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.

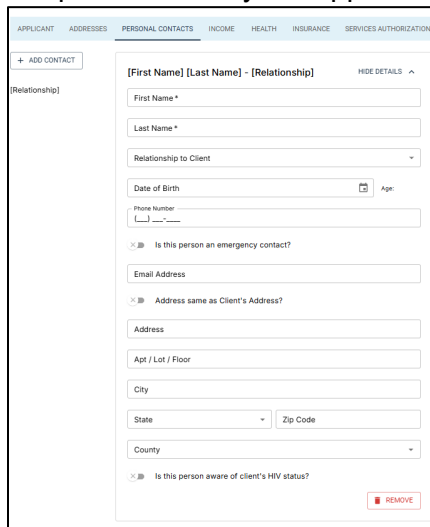
- Under Documentation Type, select Declaration of Residence.



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

### Personal Contacts Subtab

- 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."
- Contact information like phone number and email address for the jail staff must be included.
  - If this section is not completed correctly the application will be pended.



### Income Subtab

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

Applicant's Personal Income

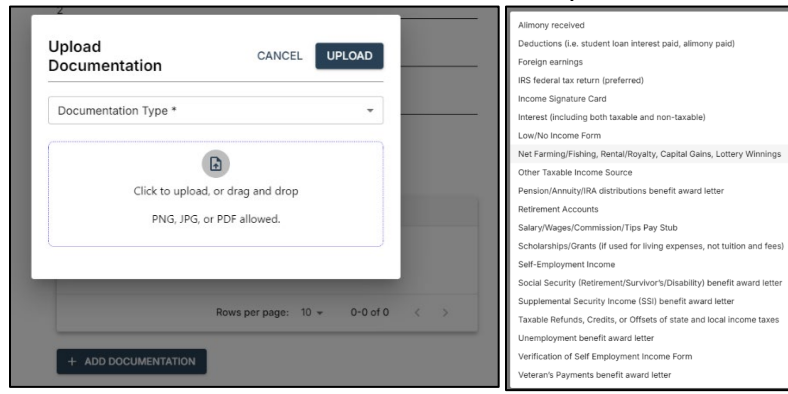
Does the applicant have personal income? \*

Yes  No

- Complete all required fields in the income section, including information on applicant’s household income, employment status, and tax filing status.

**Income Documentation**

- Jail staff are required to enter documentation verifying the new client’s income. For new clients applying for HMAP services while in jail, 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**

- Jail staff must complete all required fields in the health subtab, including the current disease stage, the estimated HIV diagnosis date, and the antiretroviral therapy history.

**HIV Status**

Current Disease Stage \*

Are you currently on Antiretroviral Therapy? \*

Yes  No

Reason not on ARV \*

ARV payment assistance unavailable

Client refused

Other

**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 subtab, select No Benefits for NEW HMAP clients.
- 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 while they are incarcerated if/once they are approved for HMAP. However, the client will be terminated from HMAP upon release if they still have active Medicaid.

### Services Authorization Subtab

- 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. **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 HMAP 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?"

**HMAP Enrollment**

Sub-Program Selection

Does applicant wish to apply for HMAP? \*

Yes

No

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

Services Authorization

Ryan White Eligibility

HMAP Enrollment

Sub-Program Selection

Does applicant wish to apply for HMAP? \*

Yes

Choose Subprogram \*

SPAP (Medicare Part D)

UMAP (Uninsured/Underinsured)

ICAP (Qualified Health Plan - Copay only)

PCAP (Full Premium and Copay)

No

- 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).

Eligibility Application

Status: Started

APPLICANT ADDRESSES PERSONAL CONTACTS INCOME HEALTH INSURANCE SERVICES AUTHORIZATION

CLOSE SAVE SUBMIT APPLICATION

### Additional NC REEDS Resources

The following section provides an overview of additional NC REEDS.

#### NC REEDS Help Email Account

- Case managers should reach out directly to NC DHHS staff with NC REEDS questions and issues by emailing [NCREEDSHelp@dhhs.nc.gov](mailto:NCREEDSHelp@dhhs.nc.gov); please include your first name, last name, your agency, your contact info, and a description of your question or issue. The NC REEDS Help Team will get back to you shortly.
  - The NC REEDS Help Team may reach out to the NC REEDS support team if they determine additional assistance is needed to resolve your issue or answer your question.

#### 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, pending, 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 tab 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. Historical information is only available for applications and updates that have been submitted since the implementation of NC REEDS implementation in October 2024.
  - In the example below, there are two rows (one New and one Update) that were submitted through NC REEDS, and one historical row (New from 9/27/24). The oldest record in the example below is from prior to NC REEDS implementation and is missing historical information.

The screenshot displays the 'ELIGIBILITY' tab of a client's profile. It features a 'Timeline' section with key events: 'Update Completed' (02/06/2025), 'RW Review Completed' (02/05/2025) and 'HMAP Review Authorized' (02/06/2025), 'Eligibility Start Date' (02/05/2025), 'Recertification Available' (06/30/2025), and 'Expiration Date' (12/31/2025). Below this is the 'Ryan White Eligibility History' section, showing two eligibility periods: one from 02/05/2025 to 12/31/2025 with 'Eligibility Started' status, and another from 10/04/2023 to 12/31/2024. The 'Application History' table below lists three records:

App Identifier	Type	Status	Started Date	Last Updated Date	Started By	Submitter	Action
123456	Update	Completed	02/06/2025	02/06/2025	REEDS USER	REEDS USER	VIEW
123457	New	Completed	02/05/2025	02/05/2025	REEDS USER	REEDS USER	VIEW
123458	New	Completed		09/27/2024	REEDS USER	REEDS USER	VIEW

At the bottom right of the table, it indicates 'Rows per page: 10' and '1-3 of 3'.

# NC REEDS Case Manager Manual

- The new History Tab allows users to access specifics about each update or application in the Application History table. Click the View button to pull up information about a specific application or update to see the information as it was when it was approved or denied.

App Identifier	Type	Status	Started Date	Last Updated Date	Started By	Submitter	Action
123456	Update	Completed	02/06/2025	02/06/2025	REEDS USER	REEDS USER	VIEW
123457	New	Completed	02/05/2025	02/05/2025	REEDS USER	REEDS USER	VIEW
123458	New	Completed		09/27/2024	REEDS USER	REEDS USER	VIEW

Rows per page: 10 1-3 of 3 < >

- This includes specifics like who submitted it, who processed it, the final status, and affiliated dates.

### Update

Status: Completed

---

INSURANCE
SERVICES AUTHORIZATION
HISTORY

#### Basic Information

Assigned Case Manager  
Client's Case Manager

Assigned Case Manager Agency  
Client's Case Management Agency

Assigned Processor

Ryan White Determination Processor  
Processor

ADAP Authorization Processor  
Processor

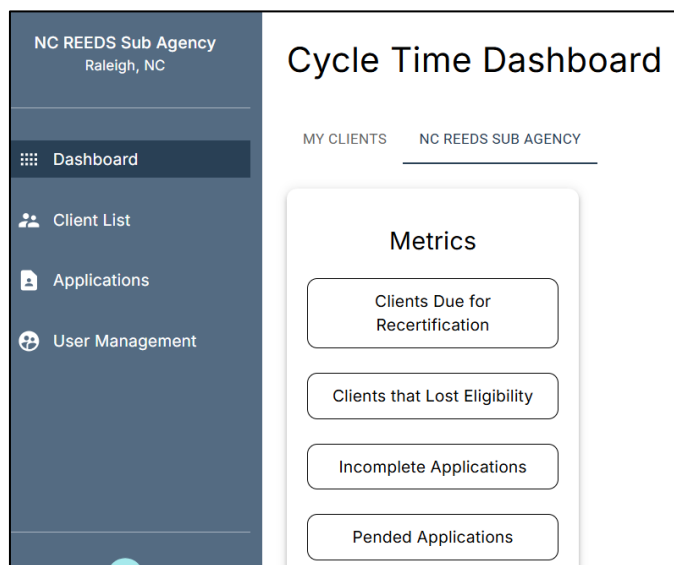
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#### Status Change History

Date	Status	User	Agency
01/09/2025	Completed	Processor	NC REEDS
01/09/2025	In Review	Processor	NC REEDS
01/09/2025	Submitted	Submitting CM	Submitting CM's Agency
01/06/2025	Pending	Processor	NC REEDS
01/06/2025	In Review	Processor	NC REEDS
01/06/2025	Submitted	Submitting CM	Submitting CM's Agency
01/06/2025	Started	Submitting CM	Submitting CM's Agency

## 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.



- **Clients Due for Recertification:** Generates a list of clients who are due to recertify for the next/current recertification period.
- **Clients that Lost Eligibility:** Generates a list of clients who were recently covered but whose eligibility has expired.
- **Incomplete Application:** Generates a list of clients whose application has been started but who haven't had their application completed and submitted.
- **Pended Applications:** Generates a list of clients whose applications have been pended by the processing team and returned to the case manager for changes/updates/required information. These applications need to be updated with the requested changes/documentation and returned to the processors for review. See the comments from the processor for more details.

**Dispenses and Lab Values in NC REEDS**

NC REEDS shows clients' lab values and dispensing information located on each client's Health Tab. As long as the client has had a dispense or lab testing for Viral Load or CD4 count in the previous 12 months that information will be listed on the Health Tab near the bottom under the header Medical Information.

- Client's lab testing can be seen on the Test Results tab's table; this will include Viral Load results and CD4 count results from the past 12 months.

Medical Information

TEST RESULTS    DISPENSES

Q Search Text

Date Completed	Test Name	Test Result	Modifier	Units
02/28/2026	HIV Viral Load	0	N/A	copies/ml
10/23/2025	HIV Viral Load	50	N/A	copies/ml
07/31/2025	HIV Viral Load	64	N/A	copies/ml
05/01/2025	HIV Viral Load	50	N/A	copies/ml

Rows per page: 10    1-4 of 4

- Client's dispense history can be seen on the Dispenses tab's table; this includes all dispenses that HMAP has covered for the client from the past 12 months.
  - To see the Dispenses table click on the Dispenses tab.

Medical Information

TEST RESULTS    **DISPENSES**

Q Search Text

Dispense Date	Drug Name	Generic Drug Name	Quantity Dispensed	Days of Supply	Prescriber NPI	Prescriber First Name	Prescriber Last Name	Pharmacy NPI	NDC	Manufactur	Payment Type	Pharmacy Name	Pharmacy No	Rx Number	Dosage Form Code
02/23/2026	BELSOMRA	Suvorexant Tab 20 MG	30	30	1659354959	N/A	NISLY	1902277239	6033530	MERCK SHARP & DOHME	COPAY	WALGREEN S #16405	N/A	1387190	N/A
02/19/2026	MOUNJARO	Tirzepatide Soln Auto-injector 12.5 MG/0.5ML	2	28	1699734533	N/A	RAO	1902277239	2146080	LILLY	COPAY	WALGREEN S #16405	N/A	1337315	N/A

- Each dispense will have a Payment Type of Full for UMAP clients or COPAY for SPAP, ICAP, and PCAP clients.

Medical Information

TEST RESULTS    **DISPENSES**

Q Search Text

Dispense Date	Drug Name	Generic Drug Name	Quantity Dispensed	Days of Supply	Prescriber NPI	Prescriber First Name	Prescriber Last Name	Pharmacy NPI	NDC	Manufactur	Payment Type	Pharmacy Name	Pharmacy No	Rx Number	Dosage Form Code
02/19/2026	BIKTARVY	BIKTARVY 50/200/25 MG TABLETS	30	30	1205262029	DAVID	SUROVCHAK	1902277239	61958250101	GILEAD SCIENCES, INC.	FULL	Store 16405	16405	1367397	N/A
01/22/2026	BIKTARVY	BIKTARVY 50/200/25 MG TABLETS	30	30	1205262029	DAVID	SUROVCHAK	1902277239	61958250101	GILEAD SCIENCES, INC.	FULL	Store 16405	16405	1367397	N/A

## Appendix A – Frequently Asked Questions (FAQs)

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

### Account Set-Up and Management

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

Contact one of your agency administrators and request a password reset link. When you reset your password, you will also need to reconfigure your multifactor authentication program. Your agency administrator will be able to reset your MFA 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 two agency administrators for their agency. Agency Administrators have the ability to request and approve 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 left-hand 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.



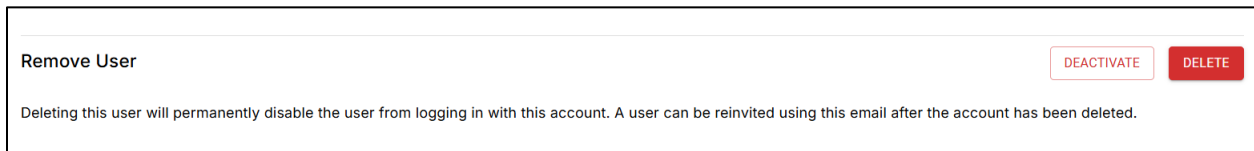
- Enter the user's credentials and permissions. For case managers, select "Case Manager" under the *Permissions* for the new user. If any additional staff should require "Agency Administrator" permission, please be sure select both "Case Manager" and "Agency Administrator" under the permissions section.
- For Programs, select Edit for **BOTH** Ryan White/HMAP.

- Click the Submit button in the upper right-hand part of the screen.
- The second agency administrator will review the new user request in the Approval Request subtab and approve or deny 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](mailto:NCREEDSHelp@dhhs.nc.gov) for assistance.

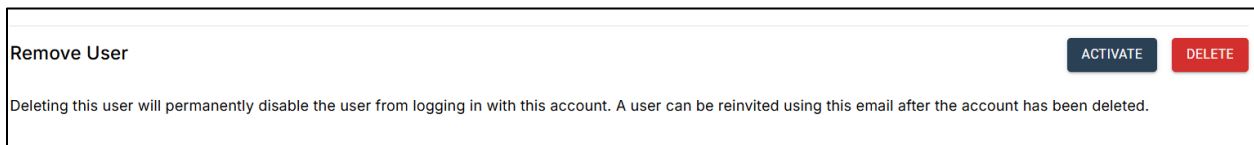
### I have a case manager who will be on leave, how do I temporarily deactivate their account?

- On the User management tab, locate the case manager on the user list. Select their name to open their profile.
- Scroll to the bottom of the page and under Remove User, select deactivate. A pop up will appear verifying the deactivation of the user, click on the deactivate button to complete the request.

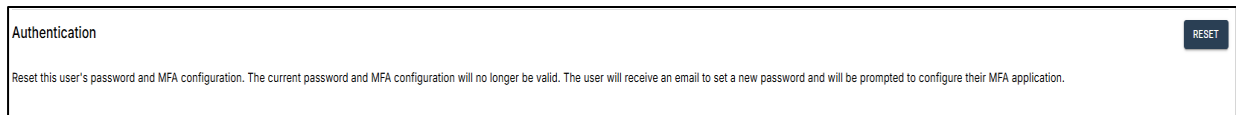


### How do I reactivate a case manager's account in NC REEDS?

- On the User management tab, locate the case manager on the user list. Select their name to open up their profile.
- Scroll to the bottom of the page and under Remove User, select activate and on the pop up confirm the activation request.
- Contact the second agency administrator so they can review and approve of the reactivation of the user's account.



- After the reactivation is approved by the second administrator. The account will need to be reset.
- Find the user on the user list. Select their profile and scroll down and then select reset.



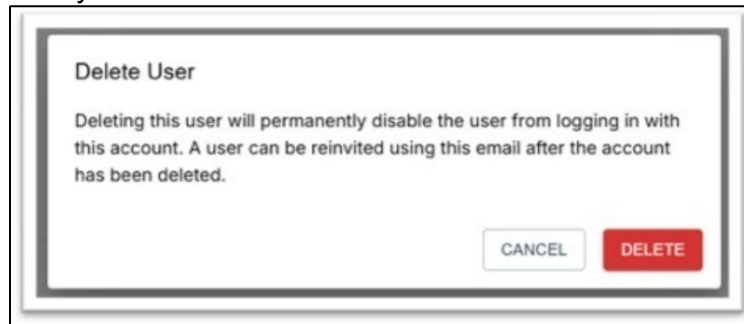
- A new link from Provide Enterprise will be sent to the user where they will create a new password and reconfigure your multifactor authentication program.

**I have a case manager at my agency who needs to be removed from NC REEDS. How do I remove an account?**

- On the User Management tab, use the search bar to identify the user you need to remove or scroll through the list and find them.
- Click on the row that contains the user’s information.
- Scroll down to the section labeled “Remove User.”
- If a user needs to be removed permanently, please click the delete button.



- After clicking delete a pop-up will appear asking you to verify that the user needs to be removed permanently. Click the delete button to remove the user.



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

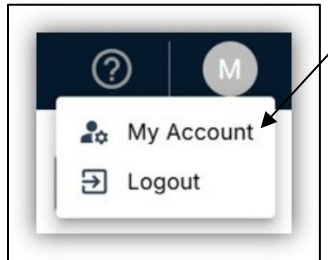
The NC REEDS new user invitation link sent via email expires after 7 days. Contact your NC REEDS agency administrator or the [NCREEDSHelp@dhhs.nc.gov](mailto:NCREEDSHelp@dhhs.nc.gov) email account to request a password reset link. When you reset your password, you will also need to reconfigure your multifactor authentication program.

**I’m an existing user and I’m having issues logging into NC REEDS. What do I do?**

NC REEDS existing users experiencing issues logging in should clear the cache on their web browser first. If the issue continues, please try to log in using this link: [NC REEDS](#). Please make sure to bookmark the initial log in page for future use. If you continue to have issues please email the [NCREEDSHelp@dhhs.nc.gov](mailto:NCREEDSHelp@dhhs.nc.gov) and provide your name, email, agency, and a description of your issue.

**I'm an existing user and I want to update my name or phone number in NC REEDS. What do I do?**

NC REEDS existing users who want to change their name or telephone number can do so via the My Account feature. In the upper right-hand corner of NC REEDS, you will see a circle with the first letter of the user's first name in it (*M* in the image below). Click on that letter, then click on "My Account" in the pop up to review and update your information as needed.



Change the applicable fields (first name, last name, primary phone, secondary phone) then hit Save, and the changes will be updated in REEDS. Please add your Primary Phone or correct it if it's not accurate.

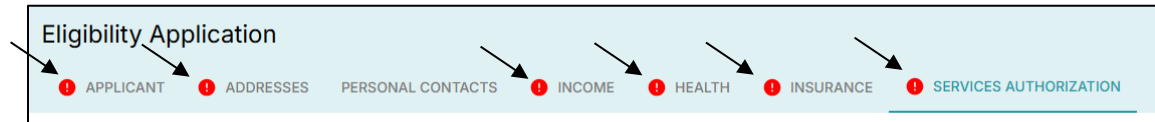
You can also update your Start Page, which refers to which page you want to see after logging into NC REEDS, the options are Application List, Client List, or None.

If you have questions related to this please email the [NCREEDSHelp@dhhs.nc.gov](mailto:NCREEDSHelp@dhhs.nc.gov) and provide your name, email you use when you log into NC REEDS, agency name, and a description of your issue.

## **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, 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 for 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.

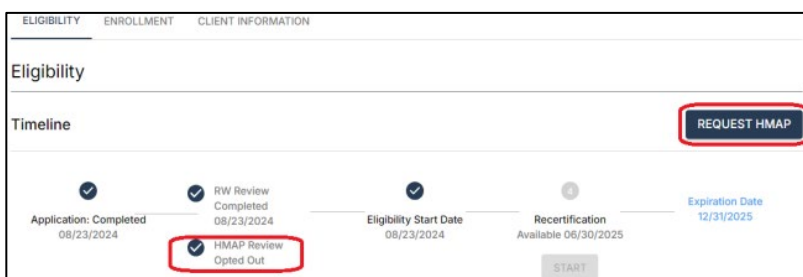


### What do I do if my client does not have documentation for income or North Carolina residency?

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.

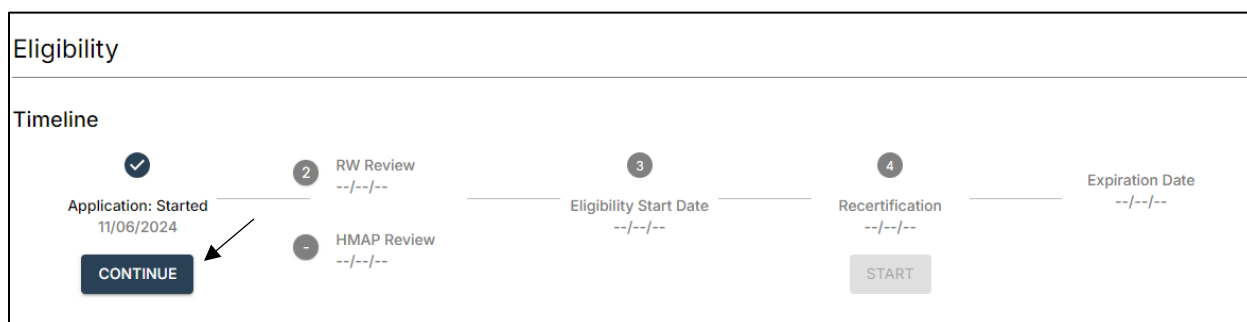
### How do I request HMAP for a client currently eligible for Care Only services?

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 of 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.



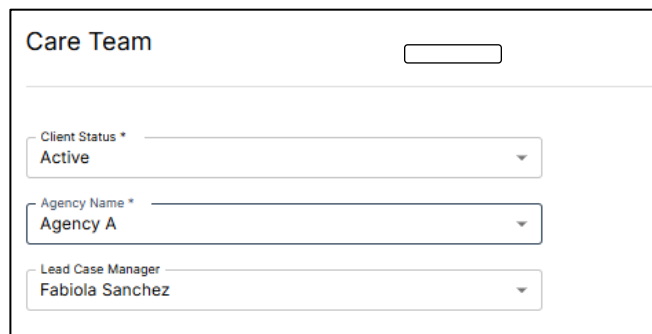
**Please Note:** If you start an application but do not submit it for processor review, the client's information will lock preventing any updates to the client's information. For example, if a client enrolled in HMAP is found to have full coverage Medicaid and needs to be disenrolled from HMAP, the HMAP team will be unable to disenroll the client until their application has been

completed, submitted, and/or cancelled. This will result in the started application being cancelled by the NC REEDS Help team.

**Please Note:** If you start an application and do not complete and submit it within 60 days NC REEDS will automatically cancel the application.

### 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. Under the Care team section, select your agency under Agency name drop-down list and then select your name from the Lead Case Manager drop-down list. Then click Save.



The screenshot shows a form titled "Care Team" with a search bar. Below the title, there are three dropdown menus. The first is labeled "Client Status \*" and has "Active" selected. The second is labeled "Agency Name \*" and has "Agency A" selected. The third is labeled "Lead Case Manager" and has "Fabiola Sanchez" selected.

### Eligibility and Enrollment

#### 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.