

Work Aid for Entering Insurance in ARIES

Importance of Insurance Data

- Client's insurance status should be collected for the Ryan White HIV/AIDS Program (which includes the HIV Care Program) and the Medi-Cal Waiver Program (MCWP).
- Insurance screens in ARIES are used to document clients with and without insurance. Insurance data is required for the Ryan White Services Report (RSR). Every client should have at least one insurance record, including clients who are uninsured, to ensure correct reporting in the RSR.
- Insurance data may also be used for compliance monitoring to ensure providers are screening for payor of last resort and for quality improvement activities.

STEP 1: Navigate to Insurance tab. Select the Eligibility tab from the top row of tabs, then click the Insurance tab from the second row of tabs.

Start Date	Source	Payer	Pending	Prim Ins	Carrier	Premium	Note
End Date	Type	Entered By		Prim HIV	Policy #		
1/1/2019	No insurance		No	No			

STEP 2: Adding an Insurance record

- To enter a new Insurance record, click the New button. To edit an existing Insurance record, click on the Edit button to the right of the insurance record.
- ARIES allows multiple Insurance records to be entered to capture the client's insurance history. If a client is uninsured, you need to add an insurance record to indicate the no insurance status.

STEP 3: Entering required Insurance data fields

Though there are many data fields on the Insurance screen, only the following are required. The other fields are optional, and agencies can decide if they need to capture these data fields.

Start Date: Enter a “Start Date” for every insurance record. Enter today’s date if the start date is unknown.

End Date: If the End Date is known, enter it when creating the record. Otherwise, you may leave “End Date” blank. This field is not required but important for accurate reporting. Please remember to check and capture the end date of previously entered insurance records that have been terminated or lapsed, as discussed later in Step 4.

Source: Select the most appropriate source from the list. If the client has health insurance from a source not listed, select "Other" from the dropdown. If the client is uninsured, select “No Insurance.” Note that there is no meaningful distinction in the numeric options in Private/Public 1/2/3, and you can select 1, 2, or 3 and they will be treated in the same manner in reports and compliance monitoring.







Type: Choose the value from the dropdown which most closely related to your Source selection. This field is required to save the Insurance Record but is not reported on the RSR. Your selection in this field will not affect the RSR.



Payer: This field is required only if the Source is “Private 1, 2, 3,” “CoveredCA/ACA,” or “Veterans.” Use the chart below to determine which Payer to select.

If the Source is →	Private 1, 2, or 3	CoveredCA/ACA	Veterans
Then select the Payer that best describes who pays for the client’s health private insurance ↓			
AIDS Drug Assistance Program’s (ADAP) Employer-Based Health Insurance Premium Payment program	Select “Employer”	Select “Employer”	
ADAP’s Health Insurance Premium Payment (HIPP) program	Select “Client”	Select “Client”	
Client	Select “Client”	Select “Client”	
COBRA or Cal-COBRA	Select “Client”	Select “Client”	
Employer	Select “Employer”	Select “Employer”	
Ryan White HIV/AIDS Program’s “Health Insurance Premium and Cost Sharing Assistance” service category	Select “Client”	Select “Client”	
Veteran’s Administration			Select “Other Public”
When the provider cannot determine who pays for the client’s health private insurance	Select “Other”	Select “Other”	Select “Other”

Example: Fakeclient was uninsured as of 1/1/2019 and had an existing No Insurance record entered already. However, as of 12/10/2020 this client was enrolled in Covered California with insurance start date of 1/1/2021, and insurance end date of 12/31/2021. Below is the screenshot to document this change. Optional fields are left blank.

FakeClient FakeData Insurance



Start Date * 01/01/2021 
End Date * 12/31/2021 
Source * CoveredCA/ACA 
Type CoveredCA - Silver 
Payer * Client 
Pending
Primary Insurance
Primary HIV Insurance
Carrier 
 if other:
Policy #
Premium
Notes

STEP 4: Check and update previously entered Insurance records.



In ARIES, a client can have multiple Insurance Records with overlapping dates. When you add a new Insurance Record, be sure to add an End Date to any previous Insurance Records that are no longer in effect. This step is necessary to properly document the client’s insurance status and for accurate RSR reporting. If you do not add an End Date to such records, they will continue to be reported as being in effect and may impact the accuracy of the RSR and other reports




Continuing with the previous example, once the Insurance Record for Covered California is entered and saved, make sure to go back to the old No Insurance record and “close it out”. As shown by the green arrow in the screenshot, press the Edit Button next to the old record to open and edit.

Start Date	Source	Payer	Pending	Prim Ins	Carrier	Premium	Note
End Date	Type	Entered By		Prim HIV	Policy #		
1/1/2019	No Insurance		No	No			
	No Insurance	The Sanz Agency		No			 
1/1/2021	CoveredCA/ACA	Client	No	No			
12/31/2021	CoveredCA - Silver	The Sanz Agency		No			

Once the old record is opened, please enter the End Date, in this case 12/31/2020, to record the end of No Insurance status and hit save.

Fakeclient Fakedata Insurance

Start Date	*	1/1/2019	
End Date	*	12/31/2020	
Source	*	No insurance	
Type		No Insurance	
Payer	*		
Pending		<input type="checkbox"/>	
Primary Insurance		<input type="checkbox"/>	
Primary HIV Insurance		<input type="checkbox"/>	
Carrier			
		if other: <input type="text"/>	
Policy #		<input type="text"/>	
Premium		<input type="text"/>	
Notes		<input type="text"/>	

Additional Information

Fix-It: Insurance Report

As a verification option there is also a “Fix-It: Insurance” report in the ARIES Client Reports tab. This report will help find records within an agency that need corrected and/or updated insurance data.

ARIES User Manual

When logged into ARIES, press the F1 key to open the ARIES User Manual. Go to the Insurance section for more detailed information.

ARIES Help Desk

For additional information or questions, please contact ARIES Help Desk at ARIES@cdph.ca.gov.