



# Ryan White HIV/AIDS Program Client Eligibility and Enrollment Portals At-A-Glance

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A **client portal** is a secure, private website or mobile application that allows clients to manage key tasks related to eligibility and enrollment. Ryan White HIV/AIDS Program (RWHAP) recipients use portals to streamline eligibility enrollment and confirmation processes by enabling clients to upload documents, track required deadlines, and access information without relying on in-person visits or phone calls. These systems reduce administrative burden for both clients and program staff by simplifying how eligibility information is submitted and reviewed.

## Benefits of RWHAP Client Portals

### For Clients

Portals reduce paperwork by allowing clients to complete applications and upload documents remotely, including via mobile devices. For many clients, this helps address transportation and scheduling challenges they may face for in-person visits. Furthermore, clients have reported that portals allow them to manage their own healthcare “identity” without having to repeatedly report it in a public office. Some portals also offer automated reminders for when it is time for confirmation and submitting documents, supporting continuous eligibility and retention in care.

### For Case Managers

Portals help minimize time spent on administrative tasks such as data entry, calculating Federal Poverty Level (FPL), and manual document tracking. This enables case managers to prioritize their time working with and providing services directly to clients.

### For Organizations

Portals can reduce administrative burden for staff and improve efficiency. Using modern data checks can reduce manual errors, allow for the remote monitoring of eligibility files, and store audit-ready eligibility information. They promote operational efficiency by moving to real-time updates, so a client’s status is updated the second they hit “Submit.” Establishing client portals with input from a legal team also mitigates risk by ensuring that digital attestations and signatures are legally equivalent to physical signatures.

## Challenges in implementing RWHAP Client Portals

Despite the benefits of client portals, there are challenges to their establishment and use. Establishing and maintaining a portal may be costly, particularly if larger technology changes are needed, and may require new staff members to join the team. Staff time may be required to learn how to use the portal and then to assist clients with onboarding or helping them to address any technology challenges. Potential client barriers to use, such as lack of a smartphone or low digital literacy, should also be considered when adding a portal component.

## Client perspectives on portals




Interviews with RWHAP clients underscore the desire for digital options to submit and track their applications and documentation.


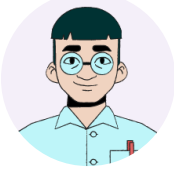


To make patient portals truly user-friendly, clients suggested several specific design improvements, including clearly defining what the portal is and its intent, using simplified language (such as a 5th-grade reading level), and adding illustrations or iconography. Clients request to be a part of the portal development process, from decision-making on options to providing feedback during the design phase to ensure options are relevant and accessible. Clients also note the promise of using these portals for a way to collect community feedback about their experiences and needs when accessing RWHAP services.




However, concerns about an entirely digital experience remain. Clients voiced serious concerns about data breaches and the safety of their medical data. They stressed the need for high data security within these portals to ensure that sensitive information will not be leaked. Even when portals are deemed easy to use, they may still be challenging for older adults or those with low digital literacy, emphasizing the need for technical assistance and training offerings for clients. They also note that portals cannot replace human empathy and the connection with staff, and that having a real person to talk to is essential when they feel lost, overwhelmed, or unsure about a form or deadline. While portals can be efficient and lower many barriers for clients, many still feel portals should not take the place of case management.

## Key roles in RWHAP client portal development

Implementing a client portal typically involves coordination across several RWHAP roles:

RWHAP Staff Role	Key Activities
 <p><b>RWHAP Parts A &amp; B Directors</b></p>	<p><b>Authorizes the transition</b> to a digital portal option and co-signs the Joint Policy Bulletin, a formal written document co-signed by city and state leaders to establish unified eligibility rules and program standards.</p> <p><b>Determines the intent and scope</b> of the portal (such as if the portal will be eligibility only, or if it will offer engagement with health records such as viewing labs).</p> <p><b>Champions the use</b> of the portal among staff and securing training for its use.</p>
 <p><b>Compliance/Quality Manager</b></p>	<p><b>Sets the protocol</b> for reviewing client-submitted data before it overwrites data in the system.</p> <p><b>Defines the digital signature policy</b> and what constitutes a valid signature.</p> <p><b>Determines what constitutes an “acceptable” digital file</b> (e.g., deciding if a smartphone photo of a paystub is sufficient vs. a scanned PDF).</p> <p><b>Creates a unified monitoring checklist</b> to be aligned across RWHAP Parts so providers aren't penalized for using portal features.</p>
 <p><b>Legal Counsel/Privacy Officer</b></p>	<p><b>Drafts the legal agreements</b>, such as a reciprocity memorandum of understanding, that allow data sharing between RWHAP Parts or with external agencies.</p> <p><b>Defines external “Read-Only” access protocols</b> and HIPAA agreements required to allow RWHAP Parts C/D clinics to view a client's central eligibility status.</p> <p><b>Drafts “Terms of Use”</b> and the specific language the client agrees to regarding digital data sharing and the consent language for case manager-assisted portal entries.</p> <p><b>Confirms what serves as the legal equivalent of a signature</b> (e.g., a text box, two-factor authentication).</p>

RWHAP Staff Role	Key Activities
 <p data-bbox="131 449 423 478"><b>Procurement &amp; Contracting</b></p>	<p data-bbox="469 296 1481 352"><b>Writes the statement of work and technical specifications</b> of contracts, including requirements of data ownership and that the portal must support standardized exports like CSV or JSON.</p> <p data-bbox="469 375 1159 405"><b>Works with the vendor to manage</b> fees, bug fixes, and price caps.</p>
 <p data-bbox="180 749 375 779"><b>IT Security Officer</b></p>	<p data-bbox="469 583 1471 724"><b>Sets the standards for Two-Factor Authentication (2FA)</b> and ensures the portal environment is compliant with HIPAA (the Health Insurance Portability and Accountability Act, a U.S. federal law designed to protect sensitive patient health information) and HITECH (The Health Information Technology for Economic and Clinical Health Act, which expanded these rules to account for digital technology and set stricter penalties).</p>
 <p data-bbox="167 1045 389 1100"><b>IT System Architect/ Data Manager</b></p>	<p data-bbox="469 816 1468 873"><b>Builds the digital bridge</b> called the Application Programming Interface, or API, to link the client portal to the database.</p> <p data-bbox="469 896 1476 953"><b>Manages the data feed</b> that pulls in information from outside sources (e.g., viral loads from the state HIV surveillance agency into the client portal).</p> <p data-bbox="469 976 1430 1033"><b>Writes the code</b> for client portal functions, including adding skip logic, preventing duplicate records, and configuring audit logs and timestamps.</p> <p data-bbox="469 1056 1474 1113"><b>Works with communication/engagement lead</b> to ensure that the portal is accessible for clients and easy to navigate.</p>
 <p data-bbox="191 1371 363 1400"><b>Clinical Leaders</b></p>	<p data-bbox="469 1245 1458 1302"><b>Facilitates clinic-based navigation of portals</b> to help clients who may have low digital literacy or lack a smartphone.</p>

RWHAP Staff Role	Key Activities
 <p><b>Communications &amp; Outreach Lead</b> (may also be called a Client Liaison, Engagement Specialist, or Administrative Lead)</p>	<p><b>Guides the client-focused user experience design</b> components of the portal, ensuring that it is accessible in needed languages and at a 6th-grade reading level.</p> <p><b>Identifies any barriers or pain points</b> in the portal that might be challenging for clients to navigate (e.g., confusing instructions, file size limits).</p>
 <p><b>Case Managers/ Eligibility Workers</b></p>	<p><b>Attends training for the portal</b> and how to navigate the front end and verify content on the backend.</p> <p><b>Supports clients in learning about and using the portal</b>, often offering to set it up during visits.</p> <p><b>Quality checking the uploaded documents</b> and requesting a re-upload if images are blurry or unclear.</p>
 <p><b>The Client</b></p>	<p><b>Users test the interface</b> to flag confusing language, stigmatizing terms, or technical bugs before launch.</p>

## Integrating a portal into RWHAP recipient data systems

The steps required to establish a client portal will vary depending on the RWHAP technology systems currently in place. Some data systems include a built-in portal feature that only needs to be activated, while others may require more setup or integration with an external, third-party application to collect and manage client-facing information.

Systems vary in the features offered on their portal. Key considerations about portals may include:

- How do clients access the portal?
  - This may be through a web browser-based portal, a dedicated smartphone app, or both.
- Does the portal have options for eligibility pre-screening?
  - Portals may feature an eligibility screening option. Some even have a module that calculates FPL, sliding scales, and payment caps in real-time.
- Is an account with a log-in required to use the portal?
  - Some portals offer a simple, no log-in form for some tasks such as quick eligibility checks or self-attestations.
- What options do clients have to submit their documents?
  - Portals may offer mobile upload options where the client can take a picture of their document and upload it to their account.
- Can the portal automate reminders prior to due dates?
  - Many portals can automatically send prompts or reminders to clients at set intervals (e.g., 60 days, 30 days) prior to the deadline.

### Arizona's Digital Shift: Streamlining the Path to Care

Once the Arizona Department of Health Services (ADHS) RWHAP established a centralized data system for their RWHAP Part A and RWHAP Part B/ADAP staff, they explored the expansion of client-facing strategies. Working with their in-house IT department, ADHS developed a client portal that allows clients to answer application questions and upload document photos directly from their phones. This shift allowed clients more autonomy over their own care and information. Through bypassing office visits and decreasing the management of paper files, this shift also freed up case manager time to focus on other key needs such as housing and transportation. ADHS is now working on silent verification tools to confirm information like income automatically, with the goal of making the whole process as smooth as a banking app.

## Mobile-Optimized Design

Smartphones or tablets are usually the primary device used by both clients and case managers. It is important that the portal be optimized for mobile viewing, with clearly labeled navigation, large tap areas, and minimal scrolling. A mobile-optimized design reduces confusion, frustration, and barriers to consistent use. These features may be particularly important for engaging clients with lower digital literacy, including older clients who may have challenges such as dexterity or vision.

## Hosting Options for Mobile Engagement

There are two primary ways to host a portal that is optimized for smartphone or tablet use:

- **Native App:** A standalone program that must be downloaded via the App Store or Google Play and installed on a specific device.
- **Mobile-Responsive Website:** A website designed to fluidly adjust its layout, images, and content to fit any screen size. It is accessed directly through a web browser and requires no separate downloads.

**Considerations when choosing where to host a portal.** A native app requires writing a different version of the code for every operating system the organization wants to support (such as iOS or Android). This also requires dependency on updates, meaning that every time Apple or Google updates their operating system, it may require an update to the app's code to ensure it doesn't break or lose functionality.

In contrast, creating a web-based portal through a mobile-responsive design simplifies the experience for both the user and the agency. It lives inside the web browser (like Safari or Chrome) instead of requiring a new download. This allows one single version of a portal to work on almost any device, regardless of whether the operating system is old, new, or made by a different company. For clients, it eliminates the need to manage storage space or frequent app updates. For the agency, it reduces the administrative burden of maintaining, updating, and troubleshooting different versions of an app across multiple operating systems (like iOS and Android). Furthermore, it ensures the portal remains accessible to clients using older devices or those with limited data plans and storage space.

### Key elements in mobile-optimized portal design

- All features function smoothly on smartphones by automatically resizing content to fit the screen.
- Buttons and selection fields are large enough to be easily tapped on mobile devices.
- The layout provides clear navigation between sections without relying on the browser's back button.
- All features remain functional on older smartphone models and web browsers.
- The site is optimized for fast loading to minimize data usage for clients with limited plans.
- System updates are managed through a single codebase to provide immediate access without manual downloads.

## Best Practices in Portal Design

In a well-designed RWHAP client portal, clients and case managers can easily locate information, and complete key tasks such as uploading documents or verifying eligibility. The portal should be intuitive, user-friendly, and efficient, reducing frustration, and encouraging consistent use. While portals provided through specific vendors will often have some accessibility components in place (e.g., 508 compliance), there are several best practices to consider when customizing any portal template for use in a specific RWHAP organization and client context.

### Accessibility and Visual Design

Portals should accommodate users with visual impairments. Compatibility with screen readers supports navigation through assistive technology. Using high contrasts between the colors of text and the background (e.g., black text on a light background) makes content easier to read, and avoiding red/green color combinations helps ensure accessibility for individuals with colorblindness. Although portals often come with some accessibility features, it is important to make sure that the final product is reviewed for ease of use and is accessible for people with disabilities as referenced in the [Americans with Disabilities Act](#).

Ensure that...

- All content is compatible with screen readers.
- There is a high contrast between text and background
- Color combinations that are difficult to distinguish, such as red and green, are avoided.

## Assistance

Providing self-service support options reduces staff time spent on technical troubleshooting. Step-by-step guides and short videos can also support users with lower digital literacy, helping them learn how to use portal features independently.

Ensure that...

- The portal includes a clearly visible Help or FAQ section.
- Potential additional resources, such as how-to videos, may be offered.
- Case managers and other staff have access to training and troubleshooting guides so they may assist clients as needed.

## Responsiveness to Context and Language

Plain, accessible language ensures content is understandable to all users. Providing multilingual options and accurate translations supports access and helps ensure clients can confidently navigate the portal regardless of language preference. Key language needs will vary by RWHAP recipient location.

Ensure that...

- The text uses plain language and avoids technical jargon.
- Translations are accurate and appropriate.

## Ease of Document Upload

RWHAP portals should provide a clear, user-friendly process for submitting eligibility documentation. Instructions should specify which documents are accepted for each eligibility requirement. Ideally, clients can upload files (e.g., PDF or JPEG) or take a photo and upload it directly. The system should confirm successful uploads and display a summary of what has been submitted, helping clients track progress and identify outstanding documentation.

Ensure that...

- The upload section includes an introduction that clearly explains what documents are required and provides examples.
- Files may be uploaded directly or through pictures using a smartphone camera.
- Confirmation messages are displayed after each upload.
- Users can review what has already been submitted and identify what is still needed.

## Glossary

This glossary introduces key terms that often arise when planning or building client portals. Establishing a shared vocabulary helps RWHAP program staff, administrators, and IT professionals communicate clearly about priorities, requirements, and expectations.

## Common Design Terms:

A confusing, cluttered, or non–mobile-friendly design can discourage RWHAP portal use and prevent clients from completing necessary tasks. Understanding these concepts helps jurisdictions ensure that their portals are practical, accessible, and responsive to real-world use.

- **ADA (Americans with Disabilities Act)**- A law requiring that programs and services, including digital tools like websites and portals, are accessible to people with disabilities. This ensures that every client has an equal opportunity to apply for and manage their care online. Example resources for accessibility include:
  - **Section 508 standards**- Federal standards requiring websites and applications to be accessible to people with disabilities. This includes compatibility with screen readers, video captioning, and maintaining contrast between text and background (including avoiding red/green combinations).
  - **Web Content Accessibility Guidelines**: the international technical standards used to determine if a website is accessible through ensuring websites are perceivable, operable, understandable, and robust.
- **Mobile-Responsive Website**- A website designed to fluidly adjust its layout, images, and content to fit any screen size. It is accessed directly through a web browser and requires no separate downloads. This approach is often the preferred way to host a client portal since it is not dependent on specific characteristics of a user’s device (e.g., version, storage capacity).
- **Native App**- A standalone program that must be downloaded via the App Store or Google Play and installed on a specific device.
- **Navigation**- The way a user moves through the portal, such as completing steps in an application, returning to the home screen, or accessing help resources. Clear menus, labeled buttons, and simple navigation reduce user frustration.
- **Optimized For Mobile**- A design that functions smoothly on smartphones and tablets, recognizing that mobile devices are often the primary way clients access portals.
- **UI (User Interface)**- The visual components users interact with, such as buttons, menus, forms.
- **UX (User Experience)**- The overall ease, efficiency, and satisfaction users feel when using a system.

## Technical Terms

Behind every portal is a combination of visible and invisible technologies. Understanding basic technical terms helps non-IT staff differentiate between what clients see on screen (the “front-end”) and the systems and data processing that occur behind the scenes (the “back-end”).

- **API (Application Programming Interface)**- The mechanism that allows different systems to communicate (e.g., sharing Medicaid eligibility data securely).
- **Back-End**- The behind-the-scenes structure that processes data and manages logic (e.g., servers, databases, APIs).
- **FHIR (Fast Healthcare Interoperability Resources)**- A universal, standardized language for exchanging digital health data. FHIR acts as the universal translator for healthcare. It ensures that when one computer sends a piece of data, the other computer knows exactly what it is, where it goes, and what it means.
- **Front-End**- The part of the application that users see, and with which they interact.
- **Hosting / Cloud**- The online location where an application is stored and runs (e.g., AWS, Azure, Google Cloud).
- **Mockups / Prototypes**- Visual models or clickable demos used to show functionality and layout before final development.

- **Operating System (OS)**- The primary software that manages a device and its applications, such as Apple's iOS for iPhones or Google's Android for most other smartphones and tablets. This term is relevant when designing a native app that a client would download through an app store.
- **Wireframes**- Simple diagrams showing the basic structure and flow of a page before visual design or coding begins.

## Security & Access

Protecting sensitive health and eligibility information is central to building client trust and ensuring compliance with federal and state regulations. These terms describe how systems verify identity, control access, secure data, and comply with laws such as HIPAA.

- **Authentication**- Verifying that a user is who they claim to be (e.g., login credentials, two-factor authentication).
- **Authorization**- Defining what a user can view/do after logging on (e.g., upload documents, view eligibility status).
- **Encryption**- Converting data into a secure format so it cannot be read by unauthorized users.
- **HIPAA Compliance**- Adhering to federal privacy and security standards for protecting health information.
- **Role-Based Access**- Assigning different levels of access based on user type (e.g., administrator vs. client).