



LOS ANGELES COUNTY  
**COMMISSION ON HIV**



# NONMEDICAL CASE MANAGEMENT: PATIENT SUPPORT SERVICES

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SERVICE STANDARDS FOR RYAN WHITE HIV/AIDS PROGRAM CARE  
AND TREATMENT SERVICES

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**IMPORTANT:** The service standards for Non-Medical Case Management Services adhere to requirements and restrictions from the federal agency, Health Resources and Services Administration (HRSA). The key documents used in developing standards are as follows:

[Human Resource Services Administration \(HRSA\) HIV/AIDS Bureau \(HAB\) Policy Clarification](#)

[Notice \(PCN\) # 16-02 \(Revised 10/22/18\): Ryan White HIV/AIDS Program Services: Eligible Individuals & Allowable Uses of Funds](#)

[HRSA HAB Policy Clarification Notice \(PCN\) # 16-02: The use of Ryan White HIV/AIDS Program Funds for Core Medical Services and Support Services for People Living with HIV Who Are Incarcerated and Justice Involved](#)

[HRSA HAB, Division of Metropolitan HIV/AIDS Programs: National Monitoring Standards for Ryan White Part A Grantees: Program – Part A](#)

[Service Standards: Ryan White HIV/AIDS Programs](#)

## Introduction

Service standards outline the elements and expectations a Ryan White service provider follows when implementing a specific service category. The purpose of the service standards is to ensure that all Ryan White service providers offer the same fundamental components of the given service category across a service area. Service standards establish the minimal level of service or care that a Ryan White funded agency or provider may offer in Los Angeles County. The development of the service standards includes guidance from service providers, consumers, and members of the Los Angeles County Commission (COH) on HIV, Standards and Best Practices (SBP) Committee.

## General Eligibility Requirements for Ryan White Services

- Be diagnosed with HIV or AIDS with verifiable documentation.
- Be a resident of Los Angeles County
- Have an income at or below 500% of Federal Poverty Level.
- Provide documentation to verify eligibility, including HIV diagnosis, income level, and residency.

Given the barriers with attaining documentation, contractors are expected to follow the Los Angeles County, Department of Public Health, Division of HIV and STD Programs (DHSP) guidance for using self-attestation forms for documentation eligibility for Ryan White services.

## Non-Medical Case Management Service Description

Non-Medical Case Management (NMCM) consists of a range of client-centered activities focused on improving access to and retention in needed core medical and support services. NMCM provides coordination, guidance, and assistance in accessing medical, social, community, legal, financial, employment, vocational, and other needed services. NMCM may also include assisting clients to obtain access to other public and private programs for which they may be eligible.

NMCM services include all types of case management models such as intensive case management, strengths-based case management, and referral case management.

Service components include:

- Initial assessment of service needs
- Development of a comprehensive, Individual Service Plan (ISP)
- Timely and coordinated access to needed core medical and support services to ensure continuity of care
- Client specific advocacy and service utilization review
- Ongoing client monitoring to assess progress on ISP and adjust as needed

In the past, DHSP has contracted Transitional Case Management services for Youth and Justice-Involved populations under NMCM services. In 2025, DHSP contracted Patient Support Services (PSS) under NMCM to support agencies in providing support services that address the unique needs of its clinic in support of clients' complex medical issues and social challenges. Clients do not need to be enrolled in MCC, AOM, or other clinic-based programs to receive PSS, however they must be Ryan White Program eligible. See the [General Eligibility Requirements for Ryan White Services](#) for more information.

Patient Support Services (PSS) are conducted by a multi-disciplinary team comprised of specialists who conduct client-centered interventions that target behavioral, emotional, social, or environmental factors that negatively affect health outcomes for Ryan White Program eligible clients with the aim of improving an individual's overall well-being and achieve or maintain viral suppression. PSS will deliver interventions directly to RWP eligible clients, link and actively enroll them with support services, and provide care coordination, when needed. Agencies contracted to provide PSS services must determine the type and number of support specialists from the list in [Appendix B](#) to makeup up PSS teams.

## Non-Medical Case Management Service Standards

All contractors must meet the [Universal Service Standards](#) approved by the COH in addition to the

following NMCM service standards. The Universal Service Standards can be accessed at:  
<https://hiv.lacounty.gov/service-standards>

**Client Assessment and Reassessment**

NMCM providers must complete an initial assessment within 30 days of intake through a collaborative, interactive, process between the case manager and client with the client as the primary source of information. With client consent, assessments may also include additional information from other sources such as service providers, caregivers, and family members to support client well-being and progress. Case management staff must comply with established agency confidentiality policies when soliciting information from external sources. Case managers will identify medical and non-medical service providers and make appointments as early as possible during the initial intake process for clients that are not linked to an MCC or AOM program. Case managers will conduct reassessments with the client as needed and based on contract guidelines from the DHSP.

The client assessment identifies and evaluates the medical, non-medical, physical, environmental, and financial strengths, needs, and resources. The assessments determines:

- Client needs for core medical and support services
- Client capacity to meet those needs
- Ability of the client social support network to help meet client needs
- Extent to which other agencies are involved in client care
- Areas in which the client requires assistance in securing services

Assessment and reassessment topics may include:

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Client strengths and resources</li> <li>• Medical Care</li> <li>• Mental health counseling/therapy</li> <li>• Substance use, harm reduction, and treatment</li> <li>• Nutrition/food</li> <li>• Housing or housing related expenses</li> <li>• Family and dependent care</li> <li>• Transportation</li> </ul> | <ul style="list-style-type: none"> <li>• Linguistic services</li> <li>• Social support system</li> <li>• Community or family violence</li> <li>• Financial resources</li> <li>• Employment and education</li> <li>• Legal needs</li> <li>• Knowledge and beliefs about HIV</li> <li>• Agencies that service client and household</li> </ul> |
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<b>CLIENT ASSESSMENT AND REASSESSMENT</b>	
<b>STANDARD</b>	<b>DOCUMENTATION</b>

Assessments will be completed within 30 days of initiation of services and at minimum should assess whether the client is in care. Accommodations may be made for clients who are unable to attend an appointment within the 30-day timeframe due to health reasons.	Completed assessment in client chart signed and dated by case manager.
Staff will conduct reassessments with the client as needed and in accordance with DHSP contract guidelines.	Completed reassessment in client chart signed and dated by case manager.

**Individual Service Plan**

An Individual Service Plan (ISP) is a tool that enables the case manager to assist the client in addressing barriers to medical care by developing an action plan to improve access and engagement in medical and support services. ISPs are developed in conjunction with the client and case manager within two weeks of the conclusion of the comprehensive assessment or reassessment. ISPs include short-term and long-term client goals determined by utilizing information gathered during assessment and subsequent reassessments. Case managers will review, and revise ISPs as needed.

The ISP should include:

- Description of client goals and desired outcomes
- Timeline for client goals and a plan to monitor client progress
- Action steps to be taken by client and/or case manager to accomplish goals
- Status of each goal as client progresses

As part of the ISP, case managers must ensure the coordination of the various services the client is receiving. Coordination of services requires identifying other staff or service providers with whom the client may be working. As appropriate and with client consent, case management staff act as liaisons among clients, caregivers, and other service providers to obtain and share information that supports optimal care and service provision. If a program is unable to provide a specific service, it must be able to make immediate and effective referrals. Case management staff is responsible for facilitating the scheduling of appointments, transportation, and the transfer of related information.

<b>INDIVIDUAL SERVICE PLAN (ISP)</b>	
STANDARD	DOCUMENTATION
ISPs will be developed collaboratively between the client and case manager within	Completed ISP in client chart, dated and signed by client and case manager.

<p>two weeks of completing the assessment or reassessment should include:</p> <ul style="list-style-type: none"> <li>• Description of client goals and desired outcomes</li> <li>• Timeline for client goals and a plan to monitor client progress</li> <li>• Action steps to be taken by client and/or case manager to accomplish goals</li> <li>• Status of each goal as client progresses</li> </ul>	
<p>Staff will revise the ISP yearly or as needed based on client progress or DHSP contract requirements.</p>	<p>Revised ISP in client chart, dated and signed by client and case manager.</p>

**ISP Implementation, Monitoring, and Follow-up**

Case managers will implement, monitor, and follow-up on a client’s ISP to ensure clients are accessing needed services and resolve any barriers clients may have in achieving their ISP goals. Case managers will maintain ongoing contact with client as appropriate, or based on DHSP contract requirements, to evaluate whether services provided are consistent with a client’s ISP and to determine if a client requires a reassessment and/or revisions to their ISP.

<b>ISP IMPLEMENTATION, MONITORING, AND FOLLOW-UP</b>	
<b>STANDARD</b>	<b>DOCUMENTATION</b>
<p>Case managers will implement, monitor, and follow-up on a client’s ISP to ensure clients are accessing needed services and resolve any barriers clients may have in achieving their ISP goals. Implementation, monitoring, and follow-up activities include:</p> <ul style="list-style-type: none"> <li>• Monitor changes in the client’s condition</li> <li>• Update/revise the ISP based on progress</li> <li>• Provide interventions and follow-up to confirm completion of referrals</li> <li>• Ensure coordination of care among client, caregiver(s), and service providers</li> <li>• Advocate on behalf of clients with other service providers</li> </ul>	<p>Signed, dated progress notes on file that detail</p> <ul style="list-style-type: none"> <li>• Changes in the client’s condition or circumstances</li> <li>• Progress made toward ISP goals</li> <li>• Barriers to ISP goals and actions taken to resolve them</li> <li>• Status of linked referrals and interventions</li> <li>• Barriers to referrals and interventions and actions taken to resolve them</li> <li>• Time spent with client</li> <li>• Case manager’s signature and title</li> </ul>

<ul style="list-style-type: none"> <li>• Empower clients to use independent living strategies</li> <li>• Help clients resolve barriers to completing referrals, accessing or adhering to services</li> <li>• Follow-up on ISP goals</li> <li>• Maintain client contact as appropriate or based on DHSP contract requirements</li> <li>• Follow-up missed appointments by the end of the next business day</li> </ul>	
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**Staff Requirements and Qualifications**

Case managers will have the knowledge, skills, and ability to fulfill their role while providing clients with a clear description of services, timelines, and possible outcomes at the initiation of services. Staff are responsible for educating clients on the importance of adhering and starting engaged in care.

Refer to Appendix B for additional staff requirements and qualifications for agencies with Patient Support Services contracts.

Case managers should have experience in or participate in trainings on:

- HIV/AIDS and related issues
- Effective interviewing and assessment skills
- Appropriately interacting and collaborating with others
- Effective written and verbal communication skills
- Working independently
- Effective problem-solving skills
- Responding appropriately in crisis situations

STAFF REQUIREMENTS AND QUALIFICATIONS	
STANDARD	DOCUMENTATION
Case managers will possess experience in clinical and/or case management in an area of social services.	Staff resumes on file.

<p>Bachelor’s degree in social work, counseling, psychology or a related field preferred and/or experienced consumers preferred.</p> <p>Ability to work effectively with people of diverse races, ethnicities, nationalities, sexual orientations, gender identities, gender expression, socio-economic backgrounds, religions, ages, English-speaking abilities, immigration status, and physical abilities in a multicultural environment.</p>	
<p>Case management supervisors will possess <del>with</del> experience in clinical and/or case management in area of mental health, social work, counseling, nursing with specialized mental health training, or psychology.</p> <p>Master’s degree in social work, Counseling, Psychology, or related field from an accredited social work program. On a case-by-case basis and with consultation and approval from DHSP, agencies may consider candidates with bachelor’s degree in social work, counseling, psychology, or related field and 2 years of related work experience.</p> <p>Ability to work effectively with people of diverse races, ethnicities, nationalities, sexual orientations, gender identities, gender expression, socio-economic backgrounds, religions, ages, English-speaking abilities, immigration status, and physical abilities in a multicultural environment.</p>	<p>Staff resumes on file.</p>

## Appendix A: HRSA Guidance for Non-Medical Case Management

### *Description:*

Non-Medical Case Management Services (NMCM) provide guidance and assistance in accessing medical, social, community, legal, financial, and other needed services. NMCM services may also include assisting eligible clients to obtain access to other public and private programs for which they may be eligible, such as Medicare, Medicare Part D, State Pharmacy Assistance Programs, Pharmaceutical Manufacturer’s Patient Assistance Programs, other state or local health care and

supportive services, or health insurance Marketplace plans. This service category includes several methods of communication including face-to-face, phone contact, and any other forms of communication deemed appropriate by the RWHAP Part recipient. Key activities include:

- Initial Assessment of service needs
- Development of a comprehensive, individualized care plan
- Continuous client monitoring to assess the efficacy of the care plan
- Re-evaluation of the care plan at least every 6 months with adaptations as necessary
- Ongoing assessment of the client's and other key family member's needs and personal support systems

*Program Guidance:*

Non-Medical Case Management Services have as their objective providing guidance and assistance in improving access to needed services whereas Medical Case Management services have as their objective improving health care outcomes.

## Appendix B: Patient Support Services (PSS) Support Specialist Descriptions

Agencies contracted to provide PSS services must determine the type and number of support specialists from the list below to make up PSS teams that address the unique needs of its clinic in support of clients' complex medical issues and social challenges.

### **Retention Outreach Specialist (ROS)**

- Ensures that PLWH remain engaged in their care and have access to necessary resources and support.
- Integrates with other HIV clinic team members to effectively identify, locate, and re-engage clients who have lapsed in their HIV care.
- Provides a targeted assessment of barriers of care, outreach, linkage, and re-engagement services, focusing on clients who are considered "out of care," facilitating their return to consistent and effective HIV treatment and support services.
- Conducts field outreach operations to efficiently locate and assist clients who have disengaged from HIV care.
- Acts as the liaison between HIV counseling and testing sites and the medical clinic to ensure that new clients are enrolled in medical care seamlessly and in a timely fashion.
- Provides crisis interventions, offering immediate support in challenging situations.
- Provides services to clients not yet enrolled in PSS, MCC Services, or clinic-based programs and can outreach clients who have not yet enrolled into any services with provider agency.

- Collaborates with the HIV clinic team members, documents client interactions, and contributes to program evaluation.
- Demonstrates cultural and linguistic competency to effectively communicate with and support a diverse range of clients.
- Participates in case conferences as needed.

Must meet the following minimum qualifications:

- Must have a High School Diploma or successful completion of GED.
- Ability and interest in doing field-based work when necessary to locate or assist clients.
- Ability to work effectively with people of diverse races, ethnicities, nationalities, sexual orientations, gender identities, gender expression, socio-economic backgrounds, religions, ages, English-speaking abilities, immigration status, and physical abilities in a multicultural environment.

### **PSS Social Worker (SW)**

- Determines client resources and needs regarding mental health services, substance use counseling and treatment, as well as housing and transportation issues to make appropriate referrals and linkages.
- Holds counselling and psychotherapy sessions for individuals, couples, and families.
- Provides support services utilizing housing-first, harm reduction, and trauma-informed care principles.
- Utilizes a sex positive framework including provision of patient education about U=U.
- Collaborates with the HIV clinic team, documents interactions, and contributes to program evaluation.
- Maintains knowledge of local, State, and federal services available.
- Addresses clients' socioeconomic needs, and as part of the PSS team, assists with client monitoring, referrals, and linkages to services, as well as following up with clients and tracking outcomes.
- Acts as the liaison between HIV counseling and testing sites and the medical clinic to ensure that new clients are enrolled in medical care seamlessly and in a timely fashion.
- Performs home visits and other field outreach on a case by-case basis.
- Provides urgent services to clients not yet enrolled in PSS.
- Participates in case conferences as needed.
- Conducts a comprehensive assessment of the SDH using a cooperative and interactive interview process. The assessment must be initiated within five working days of client contact and be appropriate for age, gender, cultural, and linguistic factors.

- The assessment will provide information about each client's social, emotional, behavioral, mental, spiritual, and environmental status, family and support systems, client's coping strategies, strengths and weaknesses, and adjustment to illness.
- SW will document the following details of the assessment in each client's chart:
  - Date of assessment;
  - Title of staff persons completing the assessment; and
  - Completed assessment form.
- Develops a PSS Intervention Plan SW will, in consultation with each client, develop a comprehensive multi-disciplinary intervention plan (IP). PSS IPs should include information obtained from the SDH assessment. The behavioral, psychological, developmental, and physiological strengths and limitations of the client must be considered by the SW when developing the IP. IPs must be completed within five days and must include, but not be limited to the following elements:
  - Identified Problems/Needs: One or more brief statements describing the primary concern(s) and purpose for the client's enrollment into PSS as identified in the SDH assessment.
  - Services and Interventions: A brief description of PSS interventions the client is receiving, or will receive, to address primary concern(s), describe desired outcomes and identify all respective PSS Specialist(s) assisting the client.
  - Disposition: A brief statement indicating the disposition of the client's concerns as they are met, changed, or determined to be unattainable.
  - IPs will be signed and dated by the client and respective SW assisting the client.
  - IPs must be revised and updated, at a minimum, every six months.

Meets the following minimum qualifications:

- Master's degree in social work, Counseling, Psychology, or related field from an accredited social work program. On a case-by-case basis and with consultation and approval from DHSP, agencies may consider candidates with bachelor's degree in social work, counseling, psychology, or related field and 2 years of related work experience.
- Ability to work effectively with people of diverse races, ethnicities, nationalities, sexual orientations, gender identities, gender expression, socio-economic backgrounds, religions, ages, English-speaking abilities, immigration status, and physical abilities in a multicultural environment.

## **Benefits Specialist**

- Conducts client-centered activities and assessments that facilitate access to public benefits and programs. Focuses on assisting each client's entry into and movement through care service systems.
- Stays up to date on new and modified benefits, entitlements, and incentive programs available for PLWH.
- Ensures clients are receiving all benefits and entitlements for which they are eligible.
- Educates clients about available benefits and provides assistance with the benefits application process.
- Helps prepare for and facilitates relevant benefit appeals.
- Collaborates with the HIV clinic team, documents interactions, and contributes to program evaluation.
- Develops and maintains expert knowledge of local, State, and federal services and resources including specialized programs available to PLWH.
- Participates in case conferences as needed.

Meets the following minimum qualifications:

- High school diploma (or GED equivalent).
- Has at least one year of paid or volunteer experience making eligibility determinations and assisting clients in accessing public benefits or public assistance programs.
- Ability to work effectively with people of diverse races, ethnicities, nationalities, sexual orientations, gender identities, gender expression, socio-economic backgrounds, religions, ages, English-speaking abilities, immigration status, and physical abilities in a multicultural environment.

### **Housing Specialist**

- Develops and maintains expert knowledge of, and contacts at, local housing programs and resources including specialized programs available to PLWH.
- Conducts housing assessments and creates individualized housing plans.
- Assists clients with applications to housing support services such as emergency financial assistance, referral and linkage to legal services (for issues such as tenant's rights and evictions), and navigation to housing opportunities for persons with AIDS programs.
- Conducts home or field visits as needed.
- Develops a housing procurement, financial, and self-sufficiency case management plan with clients as part of client housing plans.
- Offers crisis intervention and facilitates urgent referrals to housing services.
- Collaborates with the HIV clinic team, documents interactions, and contributes to program evaluation.
- Attends meetings and trainings to improve skills and knowledge of best practices in permanent supportive housing and related issues.

- Participates in case conferences as needed.

Meets the following minimum qualifications:

- Bachelor's degree or a minimum of two years' experience in social services, case management, or other related work.
- Ability to work effectively with people of diverse races, ethnicities, nationalities, sexual orientations, gender identities, gender expression, socio-economic backgrounds, religions, ages, English-speaking abilities, immigration status, and physical abilities in a multicultural environment.

### **Substance Use Disorder (SUD) Specialist**

- Conducts SUD assessments and devises personalized SUD plan with clients as part of the client's individualized care plan.
- Provides one-on-one counseling to prevent and/or support clients through recurrence by assisting and recognizing causal factors of substance use and developing coping behaviors.
- Connects clients to harm reduction resources, medications for addiction treatment, cognitive behavioral therapy, and other SUD treatment services available to reduce substance use, or to prevent or cope with recurrence.
- Collaborates with other HIV clinic team members to align substance use treatment goals with overall care, documents interactions, and contributes to program evaluation.
- Conducts individual and group counseling sessions using evidence-based interventions to address personalized goals and develop needed skill sets to minimize relapse and maintain sobriety.
- Oversees or leads day-to-day operations of contingency management programs or other evidence-based interventions.
- Provides education on harm reduction strategies and additional key resources to clients.
- Participates in case conferences as needed.

Meets the following minimum qualifications:

- Certified as a Substance Use Counselor.
- Has at least one year of experience in an SUD program with experience providing counseling to individuals, families, and groups.
- Ability to work effectively with people of diverse races, ethnicities, nationalities, sexual orientations, gender identities, gender expression, socio-economic backgrounds, religions, ages, English-speaking abilities, immigration status, and physical abilities in a multicultural environment.

### **Clinical Nursing Support Specialist**

- Provides enhanced clinical nursing support, performed by a registered nurse to facilitate:
  - Administration and supervision of client injectable medications and vaccinations;
  - Tracking of clients receiving long-acting injectable, multi-dose injectable treatments, or multi-dose vaccine series; monitors clients for side effects; makes appointments for subsequent nursing visits to ensure timely receipt of injections; and
  - Coordinates care activities among care providers for patients receiving long-acting injectable medications, vaccinations, and other injectable medications to ensure appropriate delivery of HIV healthcare services.
- Participates in case conferences as needed.
- Collaborates with the HIV clinic team, conducts health assessments as needed, documents interactions, and contributes to program evaluation.

Meets the following minimum qualifications:

- Must be a Registered Nurse.
- Ability to work effectively with people of diverse races, ethnicities, nationalities, sexual orientations, gender identities, gender expression, socio-economic backgrounds, religions, ages, English-speaking abilities, immigration status, and physical abilities in a multicultural environment.

### **Peer Navigator**

- Provides client-centered group or individual psycho-social support services to assist PLWH by providing a safe space where lived experiences and challenges can be discussed without judgement. Topics to be discussed include but are not limited to:
  - Living with HIV;
  - Healthy lifestyles (including substance use) and relationships;
  - Adherence to treatment;
  - Access and barriers to care;
  - Prevention (PrEP, PEP, DoxyPEP, treatment as prevention);
  - Disclosing status; and
  - Stigma.
- Supports individuals who may be newly diagnosed, newly identified as living with HIV, or who may require additional support to engage in and maintain HIV medical care and support services to ensure that clients are linked to care and continuously supported to remain in care.
- Conducts individual and group interventions to address personalized goals and develop needed skill sets for healthy living, ensure medication adherence and support a positive outlook for individuals living with HIV.
- Collaborates with other HIV clinic team members to align treatment goals with overall care, documents interactions, and contributes to program evaluation.

- Oversees incentives, contingency management programs, and/or other evidence-based interventions.
- Provides education on HIV clinic services available and additional key resources to clients.
- Participates in case conferences as needed.

Meets the following minimum qualifications:

- Is reflective of the population and community being served.
- Has lived experience.
- Must NOT be a current client of Contractor's clinic.
- Ability to work effectively with people of diverse races, ethnicities, nationalities, sexual orientations, gender identities, gender expression, socio-economic backgrounds, religions, ages, English-speaking abilities, immigration status, and physical abilities in a multicultural environment.