



## JOB AID: CLIENT DASHBOARD

California Healthcare Eligibility,  
Enrollment, and Retention System

December 13, 2024

The Family Planning, Access, Care, and Treatment (Family PACT) Client Dashboard contains at-a-glance case and Client information, which displays dynamically based on the case status and program eligibility. This Job Aid illustrates the functionality within each section of the Client Dashboard and is intended for Provider Staff and Site Certifiers assisting Clients.

User types: Client, Provider Staff, Site Certifiers, Super Admin and Read-Only Admins have access to the Client Dashboard; however, some of the features are unique to the user and are noted throughout this Job Aid. The following may display on the Client Dashboard depending on the case status:

- *Welcome*
- *Client Information*
- *Actions*
- *Get started with your Family PACT Program*
- *Apply for Insurance Affordability Program*
- *Contact Us*
- *Resources*

The screenshot displays the Family PACT Client Dashboard for a user named Brock Lesnar. The interface is clean and professional, with a dark blue header containing the HCS logo and navigation links for Dashboard and Message Center. The main content area is white with a light blue accent. Key features include: a 'Welcome, Brock!' message with a 'View my HAP card' link; a 'Coverage Status: Active' indicator; a green notification box stating 'Great news! You are eligible for Family PACT: You can use your benefits starting 11/26/2024.'; a 'Need to report something new?' section with a 'Report a change' button; a 'Get started with your Family PACT Program' section with two informational cards: 'About your HAP card' and 'What to know about your Family PACT'; an 'Apply for Insurance Affordability Program' section with three service cards: 'Covered CA Online', 'Covered CA Service Center', and 'Find Local Help'; and a footer with 'Contact Us' and 'Resources' sections.

## Welcome Section

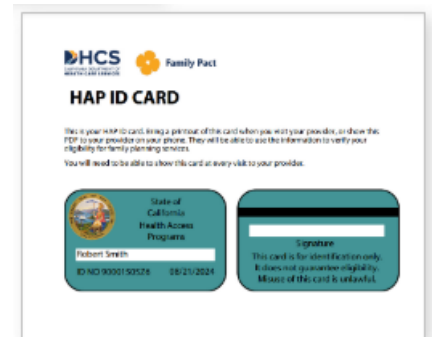
The *Welcome [Client First Name]!* section displays with a *Coverage Status:* indicator. The *Coverage Status:* indicator displays *Active* in green when the Client is eligible for Family PACT.



*Inactive* displays in gray when the Client is ineligible for Family PACT.



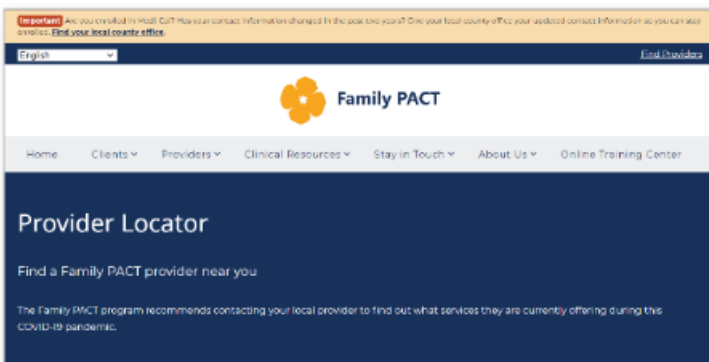
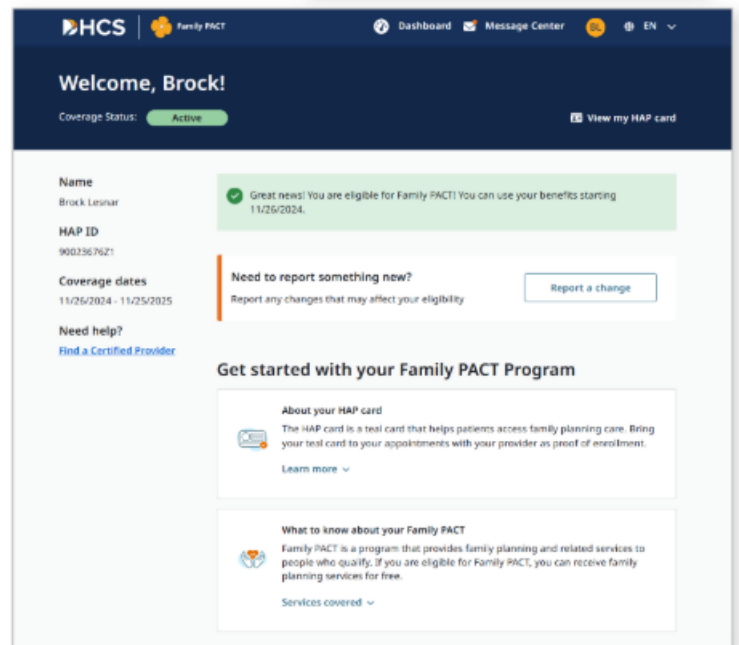
Clicking the **View my HAP card** option downloads the HAP card in a PDF format.



## Client Information

The Client Dashboard displays the following Client information:

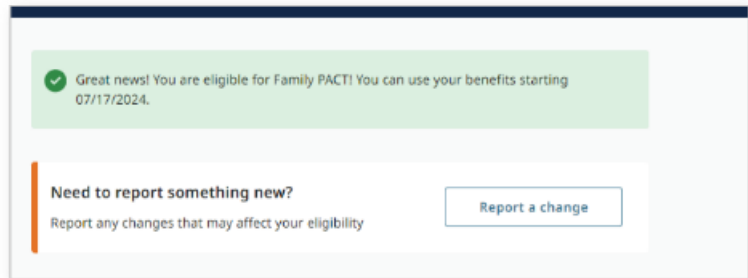
- *Name:* [First, Last Name]
- *HAP ID:* [HAP ID number]
- *Coverage Dates:* The coverage start and end date in [MM/DD/YYYY] format
- *Need help?*
  - **Find a Certified Provider** link - Navigates the user to the *Provider Locator* page in a new tab



### Actions Section

The Actions section dynamically displays action buttons and messaging based on the Client's application status:

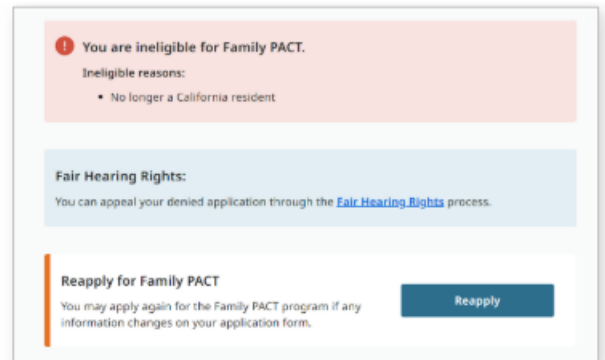
- A green banner displays with the following messaging for Clients with an *Active* status:



- *Great news! You are eligible for Family PACT! You can use your benefits starting [MM/DD/YYYY].*
- *Great news! You are still eligible for Family PACT! You can keep using your benefits until [MM/DD/YYYY].* displays when a Client completes a Report a Change (RAC) and is still eligible after the change

Clicking the **Report a change** button navigates the Client to the *Report a Change* page.

- A red banner displays with the following messages for *Ineligible* status Clients: *You are ineligible for Family PACT.* with one or more of the following Ineligible reasons:



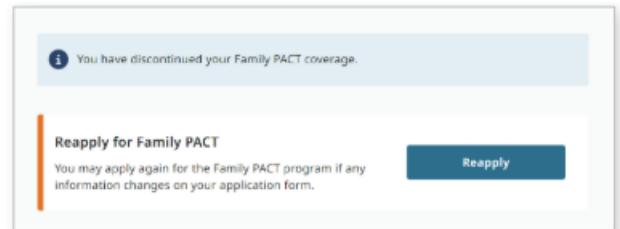
- *Below the minimum age of 12*
  - *Full scope Medi-Cal (does not have an unmet SOC) without barrier to access*
  - *No longer a California resident*
  - *Receives health insurance coverage for family planning services without barrier to access*
  - *Total taxable family income above 200 percent of the federal poverty guidelines*
- *Fair Hearing Rights: You can appeal your denied application through the Fair Hearing Rights process.* Clicking the **Fair Hearing Rights** link displays the Hearing Request Form PDF in a new tab
    - Clicking the **Reapply** button navigates the Client to the *Reapply* page to update information

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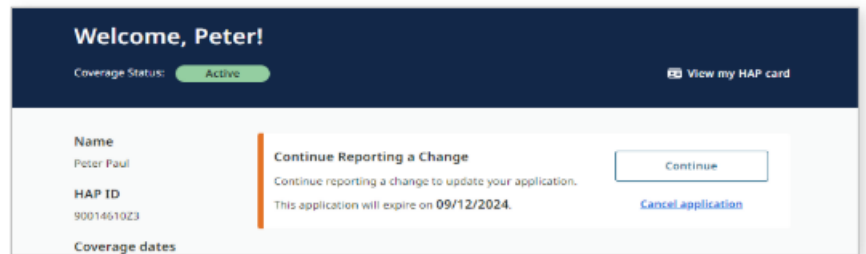
- **Recertify** button displays within 90 days of their eligibility end date
  - **Recertify your application by [MM/DD/YYYY]** displays the date by when the Client must recertify
  - Clicking the **Recertify** button navigates the user to the Recertify page
  - The Coverage Status automatically displays Inactive when the Client does not recertify before the *Recertify your application by date*



- A blue banner messaging displays for discontinued Clients informing them that they can re-apply if any information changes
  - Clicking the **Reapply** button allows the user to the reapply

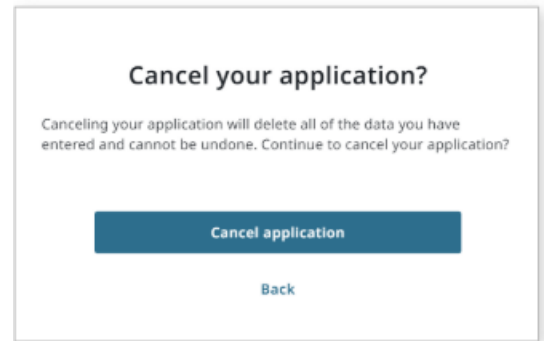


- A **Continue Reporting a Change** message displays when a Client has started, but not yet submitted, a RAC application
  - A *Continue reporting a change to update your application. This application will expire on [MM/DD/YYYY].* message displays with the application expiration date



- Clicking the **Continue** button navigates to the corresponding application page

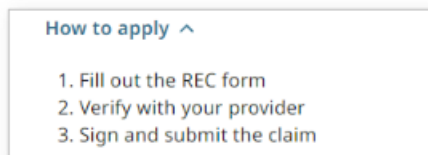
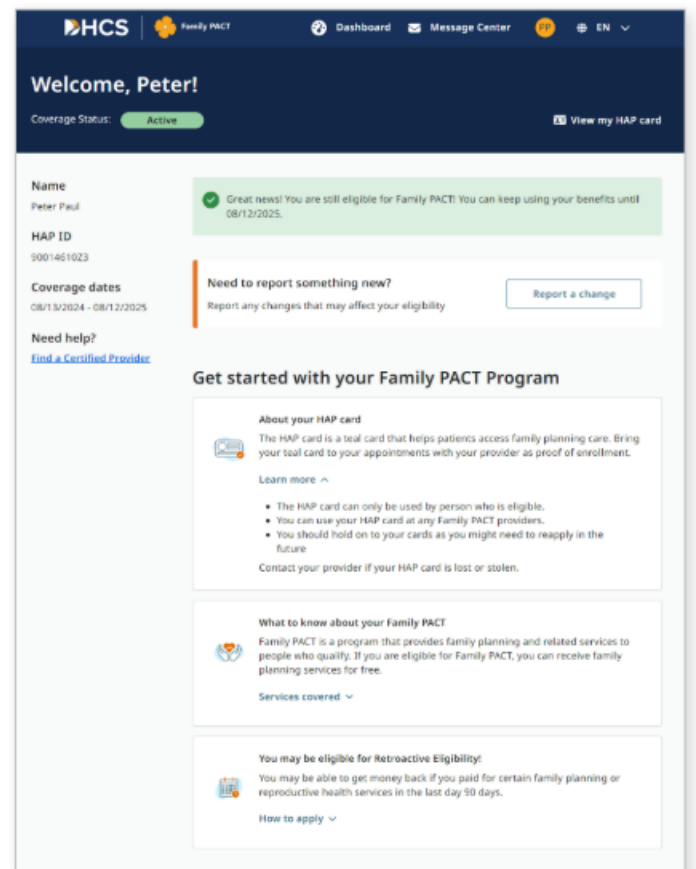
- Clicking the **Cancel application** link in the *Continue Reporting a Change* message displays the *Cancel your application?* popup informing Clients that the application information deletes when canceling the application
  - Clicking the **Cancel application** button deletes the in-progress application
  - Clicking the **Back** button closes the popup



### Get Started with Your Family PACT Program section

The *Get Started with Your Family PACT Program* section displays informational tiles explaining various services and features of Family PACT coverage. The following tiles may display:

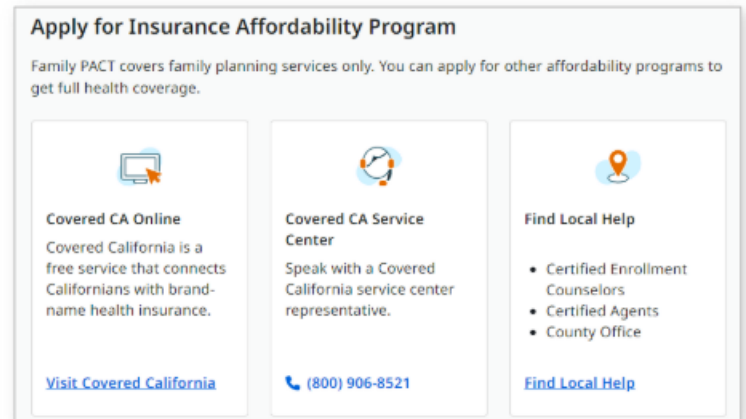
- *About your HAP card* – Displays HAP card information
  - Clicking the **Learn more** caret expands the section to display additional HAP card information
- *What to know about your Family PACT* – Displays program information
  - Clicking the **Services covered** caret expands the section to display services covered and a link to the Family PACT website
- *You may be eligible for Retroactive Eligibility!* – Dynamically displays during the first 60 days from Client's Family PACT coverage start date.
  - Clicking the **How to apply** caret expands the section to display information on how to apply for retroactive eligibility



### Apply for Insurance Affordability Program Section

The *Apply for Insurance Affordability Program* displays information tiles to assist the Client in finding health coverage:

- *Covered CA Online* – Displays a **Visit Covered California** link
  - Clicking the link navigates the user to Covered California’s website in a new tab
- *Covered CA Service Center* – Displays the Covered CA Service Center phone number: (800) 906-8521
- *Find Local Help* – Displays a **Find Local Help** link. Clicking the link navigates the user to the *Provider Search Locator* page in a new tab



### Contact Us and Resources Section

*Contact Us* displays phone number and email information to contact Family PACT .

*Resources* displays helpful Family PACT website links :

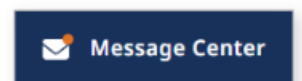
- Clicking the **Family PACT Website** link navigates the user to the Family PACT website in a new tab
- Clicking the **Find a Certified Provider** link navigates to the user to the *Provider Locator* page in a new tab



### Message Center

Clients who have selected Email as the preferred method of communication during account setup receive emails from Family PACT to notify them when there is a notice available for them to view through a secure mailbox associated with their account. Family PACT stores these emails in the form of informational messages in the *Message Center*, where Clients can view, download, and print a notice .

Clients may access the *Message Center* from any page once logged in by clicking the **Message Center** link in the Global header. Admin users can view a Client’s *Message Center* by clicking the **Message Center** link in the Global header while on the Client Dashboard. A red notification dot appears on top of the **Message Center** link indicating that there are new messages. Clicking the **Message Center** link, navigates the user to the *Message Center* .



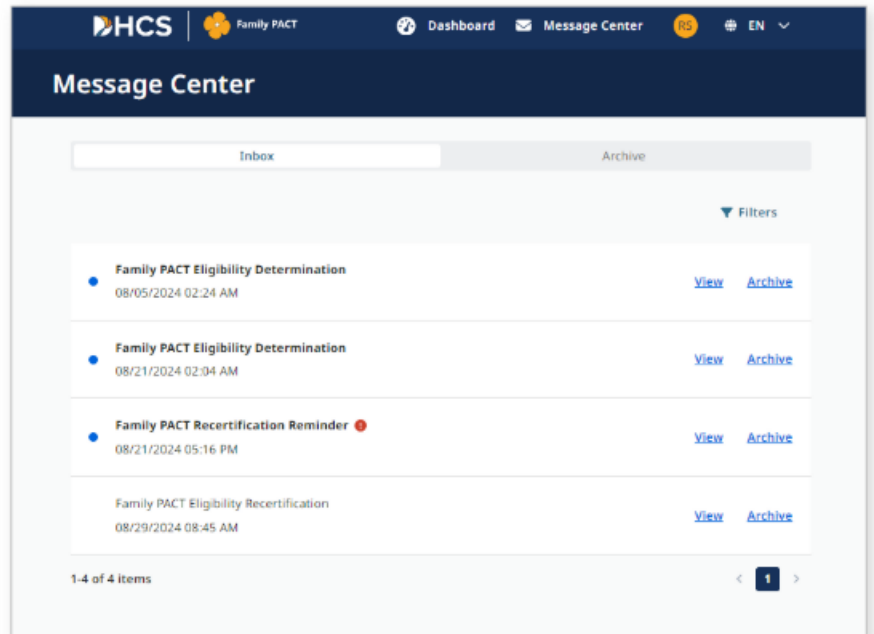
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The *Message Center* displays the **Inbox** tab by default. Messages display with the most recent message first.

*No messages in Inbox*

*You'll receive messages when there are important actions on your account.* messaging displays when there are no messages in the **Inbox** tab.

A notice message title displays in bold text with a blue dot when a notice associated to the message has not been viewed. The message title displays in plain text when the message is read. The following titles display with a date and time when a notice message is generated:



- *Family PACT Eligibility Determination*
- *Family PACT Eligibility Redetermination*
- *Family PACT Eligibility Recertification*
- *Family PACT Recertification Reminder*

A red circle with an exclamation mark displays next to the message title when a notice requires urgent attention.



- Clicking the **View** link opens the notice as a PDF in a new tab. Clients can download, and/or print the document based on browser functionality
- Clicking the **Archive** link moves the message to the *Archive* tab



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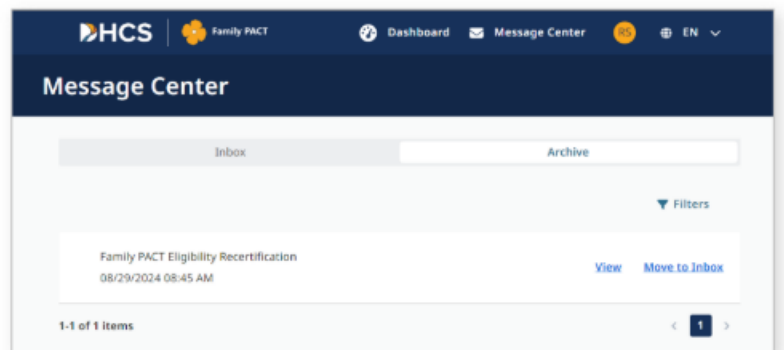
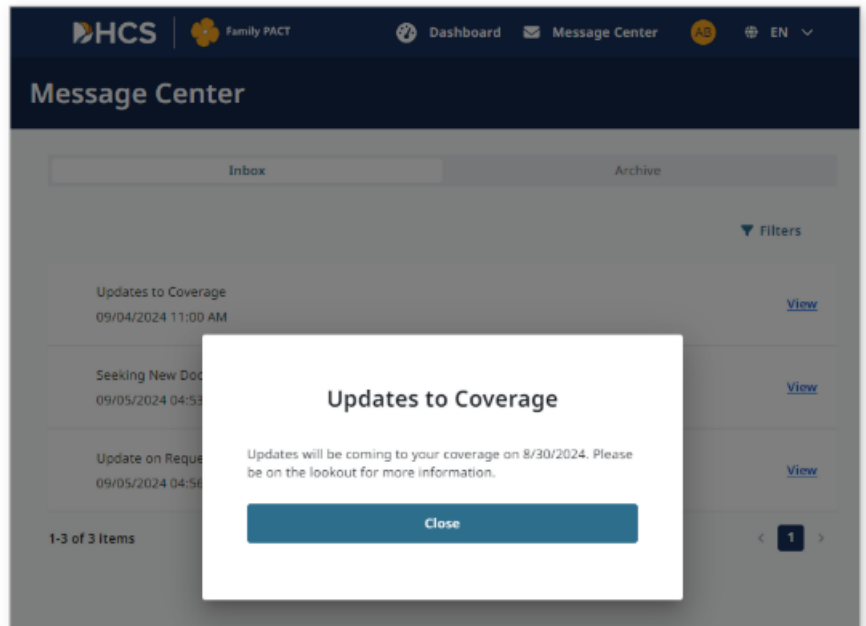
A Client may also receive a message from a Super Admin. Messages from Super Admins do not display in bold or with a blue dot.

- Clicking the **View** link for a message received from a Super Admin displays the message title and message as a popup
  - Clicking the **Close** button closes the popup

Notice messages in the **Inbox** tab can be archived, or simply moved, to the *Archive* tab allowing the Client to manage the messages that have not been viewed. The archive functionality is the same as the *Inbox* tab.

**Note:** Messages received from the Super Admin cannot be moved to the *Archive* tab.

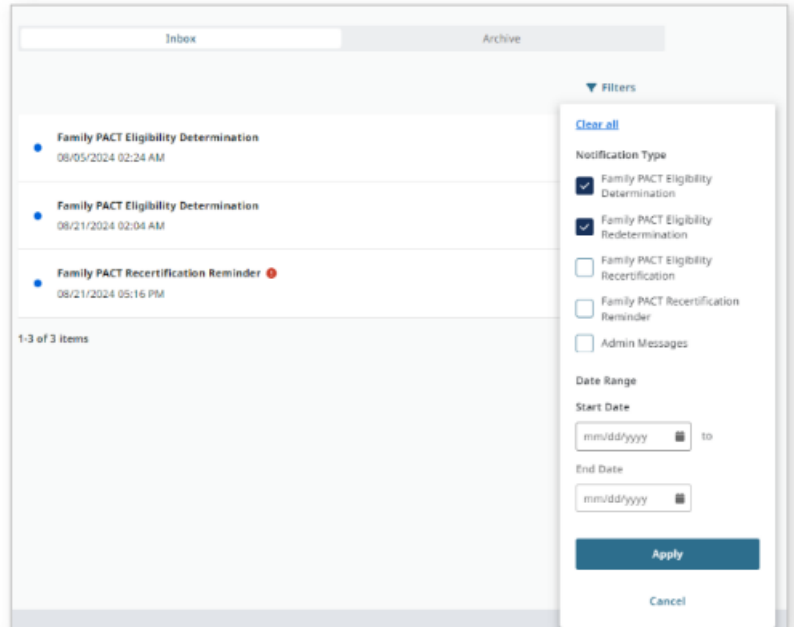
- *No messages in Archive* display when there are no messages
- Clicking the **View** link for an archived message opens the notice in a new browser window allowing the Clients to read, download, and/or print the document
- Clicking the **Move to Inbox** link moves the notice to the *Inbox* tab





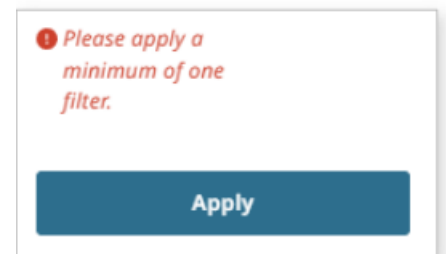
A **Filters** option displays in the *Inbox* and the *Archive* tabs of the *Message Center*. Clicking the link displays the following filter options:

- **Clear all** link – Enables when the user selects at least one filter. Clicking the link clears all the filter selections
- **Family PACT Eligibility Determination**
- **Family PACT Eligibility Redetermination**
- **Family PACT Eligibility Recertification**
- **Family PACT Recertification Reminder**
- **Admin Messages**
- *Date Range* to filter for transactions between a specific date range
  - *Start Date* **calendar** icon
  - *End Date* **calendar** icon



Clicking the **Apply** button displays the notices selected in the **Filters** option on the current tab.

- A **[#]** next to the **Filters** option indicates the number of notices in the **Inbox** and the **Archive** tab based on the selection
- A *Please apply a minimum of one filter.* error message displays when the user clicks the **Apply** button without any filter selection

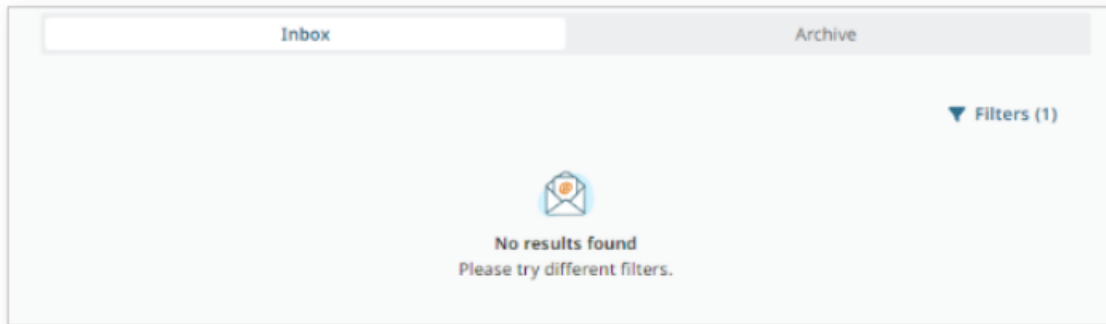


Clicking the **Cancel** button clears any filter selections and displays all notices.

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- A *No results found Please try different filters.* messaging displays in the *Inbox* or *Archive* tab when the type of notices filtered does not exist



A pagination icon is enabled when there are more than 25 messages in the *Inbox* or *Archive* tabs of the *Message Center*.

