



California Healthcare Eligibility,  
Enrollment, and Retention System



March 16, 2026

The *Client Management* and *Client Details* pages display summary sections that contain application, eligibility, and transaction type information. This Job Aid is intended for Family Planning, Access, Care, and Treatment (Family PACT) Site Certifiers, Privileged Provider Staff, Provider Staff, Super Admin, and Read-Only Admin – and illustrates how to research a Client's case, enroll a new Client, view related case history, access the Client Dashboard, and utilize these pages to process case management tasks.

### Client Management Page

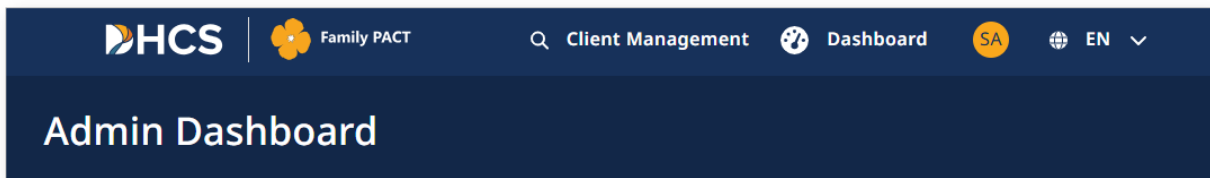
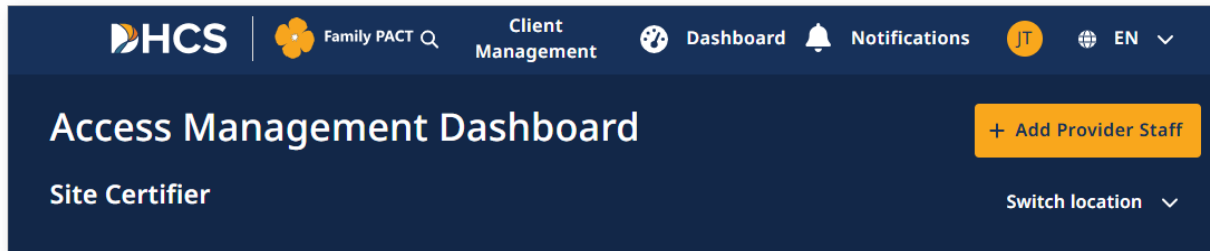
The *Client Management* page is the landing page for Provider Staff and Read-Only Admins, and is used to search and access client details, as well as enroll a new Client in the Family PACT program.

The screenshot shows the HCS Client Management interface. At the top, there is a navigation bar with the HCS logo, Family PACT icon, and search bar containing 'Client Management'. There are also notification and user profile icons. Below the navigation bar, the page title 'Client Management' is displayed, along with an 'Enroll new client' button. The main content area is titled 'Search Existing Clients' and includes radio buttons for 'SEARCH BY: HAP ID', 'Client Information', and 'Application #'. The 'HAP ID' option is selected. Below this, there are input fields for '\* HAP ID' and '\* Date of birth' (with a calendar icon). A 'Clear' button and a 'Search' button are also present. The search results section is titled 'Search Result' and displays a message: 'No results to display. Please check your search criteria.' with a magnifying glass icon and a red 'X'.

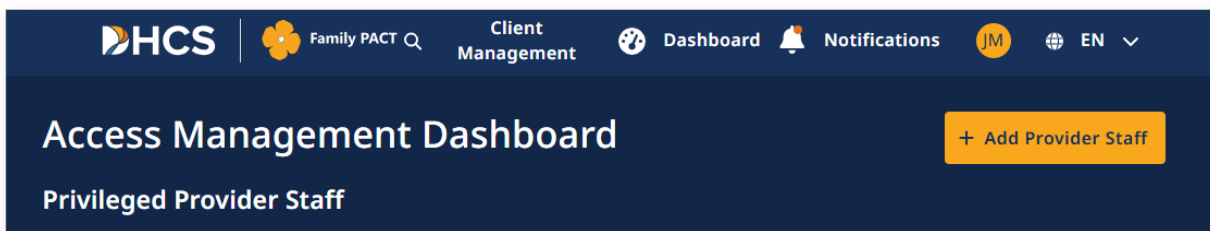
## JOB AID: CLIENT MANAGEMENT PAGES

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Site Certifiers, Privileged Provider Staff and Super Admins access this page through the **Client Management** button in the Global header. Logging in via the *Log in or create an account to find coverage* page displays the *Access Management Dashboard* as the landing page for the user.



The *Admin Dashboard* displays as the landing page for Super Admin.

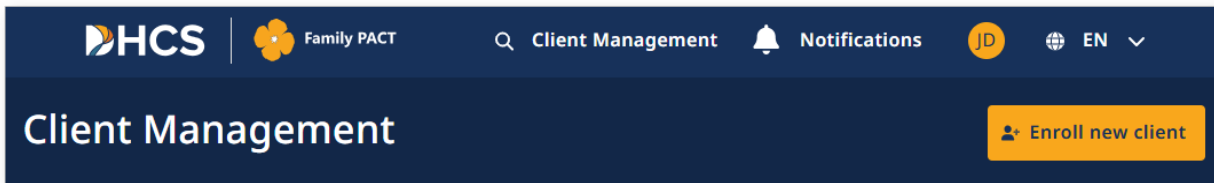


Clicking the **Client Management** button in the Global header navigates the user to the *Client Management* page.

## Enrolling a New Client

Site Certifiers, Privileged Provider Staff, Provider Staff, and Super Admin can use the **+ Enroll new client** button to apply for Family PACT services on behalf of a Client. Clicking the **+ Enroll new client** button navigates the user to the *Apply for Family PACT* page to complete a new application.

**Note:** The **+ Enroll new client** button is disabled for Read-Only Admin.

A screenshot of the 'Apply for Family PACT' form. The form has a light gray background. On the left, there is a 'Quick Navigation' sidebar with a list of categories: 'Basic Information' (highlighted), 'Demographics', 'Sexual Orientation and Gender Identity', 'Address', 'Preferred Contact Method', 'Other Health Coverage', 'Family Size and Income', and 'Other'. The main content area is titled 'Apply for Family PACT' and contains a 'Basic Information' section. This section includes several input fields: a text field for 'First name' (marked with an asterisk), a text field for 'Middle name', a text field for 'Last name' (marked with an asterisk), a dropdown menu for 'Suffix' with 'Select One' as the placeholder, a date picker for 'Date of birth' (marked with an asterisk) showing 'mm/dd/yyyy', and a dropdown menu for 'Reason for SSN' with 'Select One' as the placeholder.

## Searching for Existing Clients

Site Certifiers, Privileged Provider Staff, Provider Staff, Super Admins, and Read-Only Admins can use the search functionality on the *Client Management* page to search for existing Clients. The following search parameters display:

- **HAP ID** – Displays as the default selection with the following fields:
  - **HAP ID** – Enter the 10-digit Health Access Program (HAP) identification number
  - **Date of birth** – Enter the Client’s date of birth in [MM/DD/YYYY] format or click the **calendar** icon to display a calendar view for date selection

The screenshot shows the 'Client Management' page header with 'HCS Family PACT' logo, 'Client Management' title, and navigation icons for 'Notifications' and 'JD'. A yellow 'Enroll new client' button is in the top right. Below the header, the 'Search Existing Clients' section has three radio buttons: 'HAP ID' (selected), 'Client Information', and 'Application #'. There are two input fields: '\* HAP ID' (empty) and '\* Date of birth' (with placeholder 'mm/dd/yyyy' and a calendar icon). A 'Clear' link and a blue 'Search' button are to the right. Below the search area, the 'Search Result' section is empty, showing a magnifying glass icon with a red 'X' and the text 'No results to display. Please check your search criteria.'

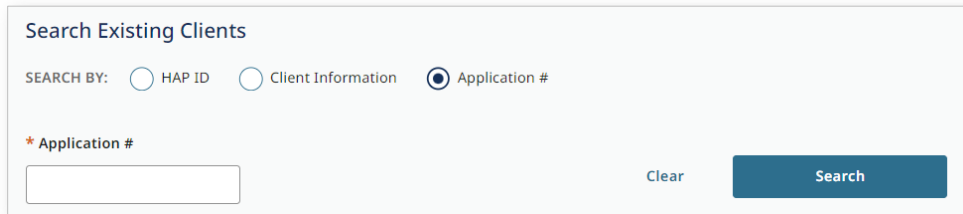
- **Client Information** – Displays the following:

- **First name**
- **Last name**
- **ZIP code**
- **Date of birth**
- **Sex**

The screenshot shows the 'Client Management' search interface with 'Client Information' selected. The 'SEARCH BY:' section has three radio buttons: 'HAP ID', 'Client Information' (selected), and 'Application #'. There are five input fields: '\* First name', '\* Last name', '\* ZIP code', '\* Date of birth' (with placeholder 'mm/dd/yyyy' and a calendar icon), and '\* Sex' (a dropdown menu with 'Select One' and a downward arrow). A 'Clear' link and a blue 'Search' button are to the right.

## JOB AID: CLIENT MANAGEMENT PAGES

- **Application #** – Displays the **Application #** field allowing a 10-digit application number



Search Existing Clients

SEARCH BY:  HAP ID  Client Information  Application #

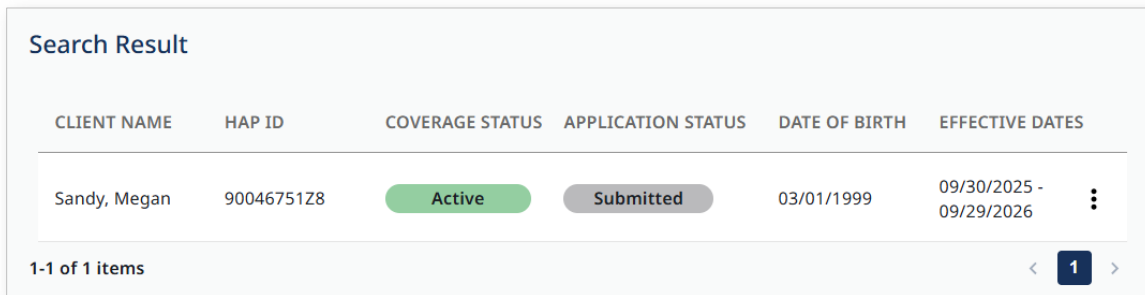
\* Application #

Clear

- Clicking the **Clear** button clears the search fields
- Clicking the **Search** button conducts the search and displays applicable results in a *Search Result* section

The *Search Result* section displays the following columns:

- *CLIENT NAME* – Displays the Client’s last name and first name
- *HAP ID* – Displays the Client’s HAP identification number
- *COVERAGE STATUS* – Displays the Client’s coverage status as *Active* or *Inactive*
- *APPLICATION STATUS* – Displays the Client’s application status as *Submitted* or *Pending*
- *DATE OF BIRTH* – Displays the Client’s date of birth
- *EFFECTIVE DATES* – Displays the Client’s coverage dates

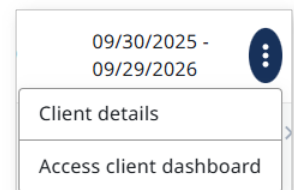


CLIENT NAME	HAP ID	COVERAGE STATUS	APPLICATION STATUS	DATE OF BIRTH	EFFECTIVE DATES
Sandy, Megan	90046751Z8	Active	Submitted	03/01/1999	09/30/2025 - 09/29/2026

1-1 of 1 items

An **ellipsis** icon displays for each of the *Search Result* records. Clicking the **ellipsis** icon displays two options:

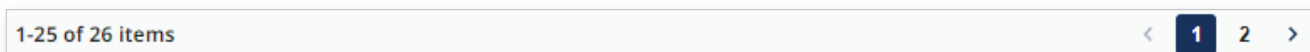
- **Client details** – Navigates the user to the *Client Details* page
- **Access client dashboard** – Navigates the user to the Client Dashboard



09/30/2025 - 09/29/2026

- Client details
- Access client dashboard

*[X] of [X] items* – Displays the number of Client search results on the page.



1-25 of 26 items

< 1 2 >

### Client Details Page

Clicking the **Client details** option available from the **ellipsis** icon on the *Client Management* page navigates the user to the *Client Details* page.

## Client Management

Enroll new client

### Search Existing Clients

SEARCH BY:  HAP ID  Client Information  Application #

\* First name: Megan  
\* Last name: Sandy  
\* Zip code: 90210  
\* Date of birth: 03/01/1999

\* Sex: Female

Clear Search

### Search Result

CLIENT NAME	HAP ID	COVERAGE STATUS	APPLICATION STATUS	DATE OF BIRTH	EFFECTIVE DATES
Sandy, Megan	90046751Z8	Active	Submitted	03/01/1999	09/30/2025 - 09/29/2026

1-1 of 1 items

- Client details
- Access client dashboard

## JOB AID: CLIENT MANAGEMENT PAGES

The *Client Details* page displays the following Client-specific information and various action buttons and links depending on the Client's status:

**Sadie Hunt**

Coverage Status: **Active** [View HAP card](#)

[← Back to Client Management](#)

**Name**  
Sadie Hunt

**HAP ID**  
90074864Z0

**Coverage dates**  
02/17/2026 - 02/16/2027

[Override Eligibility Request](#)

[Report a change](#)

[Reaffirm eligibility](#)

[Discontinue](#)

**Access**  
[Case History](#)  
[Case Notes](#)  
[Client Portal](#)

**Client Details**

**Basic Information**

First name: Sadie  
Middle name: —  
Last name: Hunt  
Suffix: —  
Date of birth: 03/01/••••  
Social Security Number (Last 4): —  
Marital status: —  
Client's primary language: English


**Demographics**

Great news! The client is eligible for Family PACT! They can use their benefits starting 02/17/2026

- **Coverage Status** – Dynamically displays the Client's coverage status as *Active* or *Inactive*
- **View HAP card** button – Displays a PDF of the Client's HAP ID card in a new tab
- **Back to Client Management** button – Navigates the Site Certifier or Provider Staff to the *Client Management* page
- Dynamic eligibility information displays based on the Client's case status:
  - A green banner displays for Eligible Clients with their coverage start date
  - The following text displays in a green banner when a RAC or Recertification is completed: *Great news! The client is still eligible for Family PACT! They can keep using their benefits until [MM/DD/YYYY]*

## JOB AID: CLIENT MANAGEMENT PAGES


- A red banner displays with Ineligible reasons when the Client is no longer eligible for Family PACT services

 The client is no longer eligible for Family PACT.

Ineligible reasons:

- Total taxable family income above 200 percent of the federal poverty guidelines
- Receives health insurance coverage for family planning services without barrier to access

- A red banner displays with a list of incomplete sections when the Client is missing required information


 Required Information Missing

The client's application is missing answers to required questions. You will need to enter the missing details in order to redetermine the client's eligibility.

Please complete the following sections:


- Health Coverage
- Family Size and Income

- A yellow banner displays with a recertify by date when the Client is required to recertify their Family PACT coverage

 Recertify the client for Family PACT by [mm/dd/yyyy].

It is time for the client to recertify their Family PACT coverage. They must recertify by [mm/dd/yyyy] or their coverage will be terminated.

- A blue banner displays when the Client has discontinued their Family PACT coverage

 The client has discontinued their Family PACT coverage.

- *Name*
- *HAP ID*
- *Aid Code* – Displays for Super Admin and Read-Only Admin users
- *Coverage dates* – Displays the Client's dates of coverage. A dash (–) displays when Clients are ineligible for Family PACT coverage or when Clients have discontinued their Family PACT coverage

**Name**  
Jane Miller

**HAP ID**  
9007483526

**Aid Code**  
8H

**Coverage dates**  
01/28/2026 - 01/27/2027

## JOB AID: CLIENT MANAGEMENT PAGES

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- **[Override Eligibility Date** link – Displays for Super Admin users when an Eligible Client has a coverage start date that can be overridden
- **Override Eligibility Request** link – Displays for Privileged Provider Staff and Site Certifiers when an Eligible Client has a coverage start date that can be overridden and allows the user to submit a request to override
  - Dynamic eligibility information displays based on the Client's override eligibility request status of pending, approved, or denied with the following links:
    - **Update Request** link – Displays for Privileged Provider Staff and Site Certifiers when the Client has an in-progress request and allows the user to update their override request
    - **View Request** link – Displays for Super Admins when the Client has a completed override eligibility request and allows the user to view the details of the request]
- **Reapply** button – Displays for Inactive Clients who have discontinued their Family PACT coverage
- **Continue application** button – Displays when Clients have initiated but have not yet submitted their application and are missing required information. Clicking the **Continue application** button navigates Site Certifiers and Provider Staff to the *Apply for Family PACT* page to complete the application
- **Recertify** button – Displays when Clients are within 60 days of their coverage end date and need to recertify their Family PACT coverage. Clicking the **Recertify** button navigates Site Certifiers and Provider Staff to the *Recertify Your Application* page
- **Report a change** button – Displays when Clients have Active Family PACT coverage. Clicking the **Report a Change** button navigates Site Certifiers and Provider Staff to the *Report a Change* page to make updates to the Client's information

### Coverage dates

01/28/2026 - 01/27/2027

[Override Eligibility Date](#)

(Start date overridden)

**i** Override Eligibility request: Approved

[View Request](#)

[Override Eligibility Request](#)

**i** This client has a pending override eligibility request.

[Update Request](#)

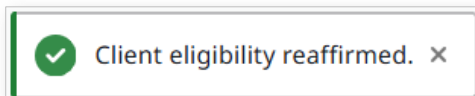
[Report a change](#)

[Reaffirm eligibility](#)

[Discontinue](#)

- **Reaffirm eligibility** button – Displays for Active Clients. Clicking the **Reaffirm eligibility** button displays the *Reaffirm Eligibility* popup

- Selecting the checkbox confirms no changes to the application
- Clicking the **Reaffirm eligibility** button reaffirms the Client's eligibility, generates an automated case note, and displays the *Client Details* page with a *Client eligibility reaffirmed*. Message



- Clicking the **Cancel** button closes the popup

The form is titled "Reaffirm Eligibility" and features a warning icon at the top. Below the title, there is a paragraph of text: "Review the client's application details before reaffirming eligibility. If you need to make changes to the application, use the **Report a change** function instead." This is followed by a section header "\* Confirm you have reviewed the client's eligibility" and a checkbox with the text "I attest I have reviewed the client's eligibility and there have been no changes to their application." At the bottom, there are two buttons: "Reaffirm eligibility" (a dark blue button) and "Cancel" (a text link).

- **Discontinue** button – Displays for Active Clients

Clicking the **Discontinue** button navigates Site Certifiers and Provider Staff to the *Discontinue Family PACT* page to select a reason for discontinuing Family PACT coverage

**Note:** A *Provider site* dropdown displays for Site Certifiers and Provider Staff who are associated to more than one site location. Users are required to select the site location they are working from.

- Clicking the **Continue** button discontinues the Client from Family PACT coverage and navigates the user to the *Client Details* page
- Clicking the **Cancel** button navigates the user to the *Client Details* page

The form is titled "Discontinue Family PACT" and includes a paragraph: "Please choose a reason why you are discontinuing your Family PACT coverage. Once you submit, your coverage will be discontinued immediately." Below this is a section header "\* Why are you leaving the Family PACT Program?" followed by six radio button options: "No longer a California resident", "Client is over 200% of the federal poverty guidelines", "Client no longer has a medical necessity (sterilization)", "Client has health insurance coverage for family planning services", "Client has full- scope Medi-Cal without Share of Cost", and "Permanent deactivation". At the bottom, there are two buttons: "Continue" (a dark blue button) and "Cancel" (a text link).

The form is titled "\* Provider site" and features a dropdown menu with the text "Select one" and a downward arrow. Below the dropdown is a note: "This should be the provider site you are working from."

## JOB AID: CLIENT MANAGEMENT PAGES

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- The **Access** section displays the following links:
  - **Case History** – Navigates the user to the *Case History* page
  - **Case Notes** – Navigates the user to the *Case Notes* page
  - **Send Message** – Displays only for Super Admin and displays the *Send Message to Client* popup
  - **Client Portal** – Navigates the user to the Client Dashboard
- The *Client Details* section displays the Client's application information in the following sections:
  - *Basic Information*
  - *Demographics*
  - *Sexual Orientation and Gender Identity*
  - *Address*
  - *Preferred Contact Method*
  - *Health Coverage*
  - *Family Size and Income*

Access

[Case History](#)

[Case Notes](#)

[Send Message](#)

[Client Portal](#) 

### Client Details

#### Basic Information

First name: Dean

Middle name: —

Last name: Sandstrom

Suffix: —

Date of birth: 03/01/••••

Social Security Number (Last 4): 6789

Marital status: —

Client's primary language: English

#### Demographics

What is the client's race? —

Is the client of Hispanic, Latino or Spanish origin? —

#### Sexual Orientation and Gender Identity

What is the client's sex? Male

What sex was listed on the client's original birth certificate? —

What is the client's gender? —

How does the client define their sexual orientation? —

### Case History – Admin View

A **Case History** link displays for Site Certifier, Privileged Provider Staff, Provider Staff, Super Admin, and Read-Only Admin users on the *Client Details* page. Clicking the **Case History** link navigates users to the *Case History* page.

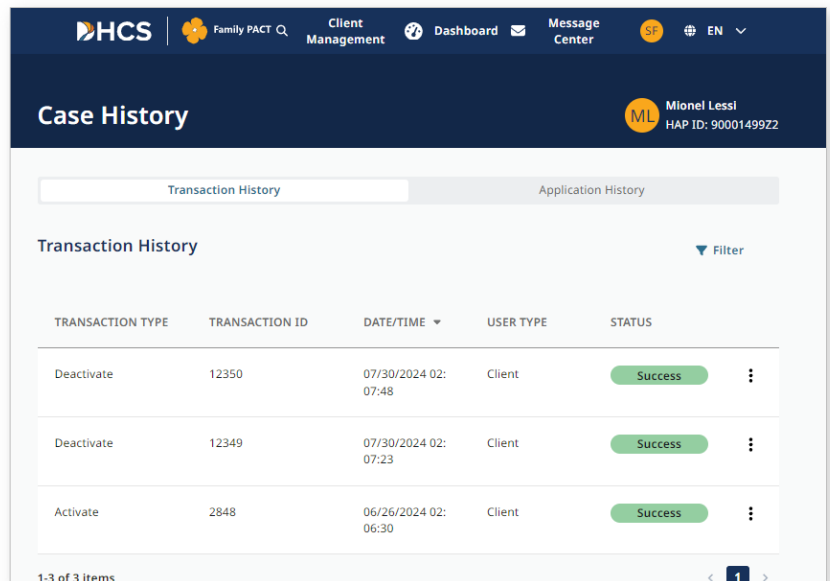
The *Case History* page displays a **Transaction History** tab for Site Certifier, Privileged Provider Staff, Provider Staff, Super Admin, and Read-Only Admin users. The *Transaction History* page displays the following:

- **TRANSACTION TYPE** – Dynamically displays the following based on the transaction type:

- *Activate*
- *Deactivate*
- *Recertify*
- *Update*

- **TRANSACTION ID** – Displays the unique ID for the transaction

- **DATE/TIME** – The date and time of the application submission
  - A **caret** icon displays to sort the date time from oldest to newest



The screenshot shows the 'Case History' page with a 'Transaction History' tab selected. The table below displays the transaction history:

TRANSACTION TYPE	TRANSACTION ID	DATE/TIME	USER TYPE	STATUS
Deactivate	12350	07/30/2024 02:07:48	Client	Success
Deactivate	12349	07/30/2024 02:07:23	Client	Success
Activate	2848	06/26/2024 02:06:30	Client	Success

At the bottom of the table, it shows '1-3 of 3 Items' and a page number '1'.

- **USER TYPE** – Displays the user who submitted the application:

- *Super Admin*
- *Provider Site Certifier*
- *Provider Staff*
- *Client*

- **STATUS** – Dynamically displays a *Success*, *Error*, or *Retry* status depending on the outcome of the transaction

- Clicking the **Filter** button on the *Transaction History* page displays filter options. The **Filter** button displays the following options:

- **Clear all** – Clicking the link clears the filter selection

## JOB AID: CLIENT MANAGEMENT PAGES

- *Transaction Type:*

- **Activate**
- **Update**
- **Recertify**
- **Deactivate**

- *User Type:*

- **Super Admin**
- **Provider Site Certifier**
- **Provider Staff**
- **Client**

- *Status:*

- **Success**
- **Error**
- **Retry**

- Clicking the **Apply** button displays the results matching on the filter selection

- Clicking the **Application History** tab displays the *Application History* page. The functionality on the *Application History* page is similar to the *Transaction History* page, including the **Filter** option

The screenshot shows the 'Case History' page for Mionei Lessi (HAP ID: 900145922). The 'Transaction History' tab is selected. A table lists three transactions:

TRANSACTION TYPE	TRANSACTION ID	DATE/TIME	USER TYPE	STATUS
Deactivate	12350	07/30/2024 02:07:48	Client	Success
Deactivate	12349	07/30/2024 02:07:23	Client	Success
Activate	2848	06/26/2024 02:06:30	Client	Success

The filter dropdown menu is open, showing options for Transaction Type (Activate, Update, Recertify, Deactivate), User Type (Super Admin, Provider Site Certifier, Provider Staff, Client), and Status (Success, Error, Retry). The 'Apply' button is highlighted.

The screenshot shows the 'Case History' page for Joyce Miller (HAP ID: 9002781122). The 'Application History' tab is selected. A table lists two applications:

APPLICATION TYPE	DATE/TIME	USER TYPE	START DATE	STATUS
Discontinue	11/16/2025 02:26:31	-	10/09/2024	Inactive
Discontinue	10/23/2025 03:22:52	-	10/11/2024	Inactive

The filter dropdown menu is open, showing options for Application Type (Intake, Report a Change, Recertify, Reapply, Discontinue). The 'Apply' button is highlighted.

## Adding a Case Note

The *Case Notes* page displays when clicking the **Case Notes** link in the *Access* section of the Client Dashboard or *Client Details* page. The Client's name and *HAP ID* display at the top of the page.

- Users can enter up to 400 characters in the **Add a Case Note** field
  - Clicking the **Clear note** button clears the field
- Clicking the **Save Note** button saves the case note and displays the note in the *Note History* section
- The *Notes History* section displays with the following when case notes are added:
  - *USER ID* – Displays the Admin's user ID number
  - *DATE* – Displays the date the case note was added
  - *Case Note* – Displays the note added by the Admin user
  - A **View more** link displays for longer case notes. Clicking the **View more** link expands to display the full length of the note with a **View less** link that collapses the note
- Reaffirming the Client's eligibility automatically adds a case note
- *[X] of [X] items* – Displays # of the case note of Total number of case notes
- Pagination arrows display at the bottom of the page to display additional case notes when a Client has more than 25 case notes

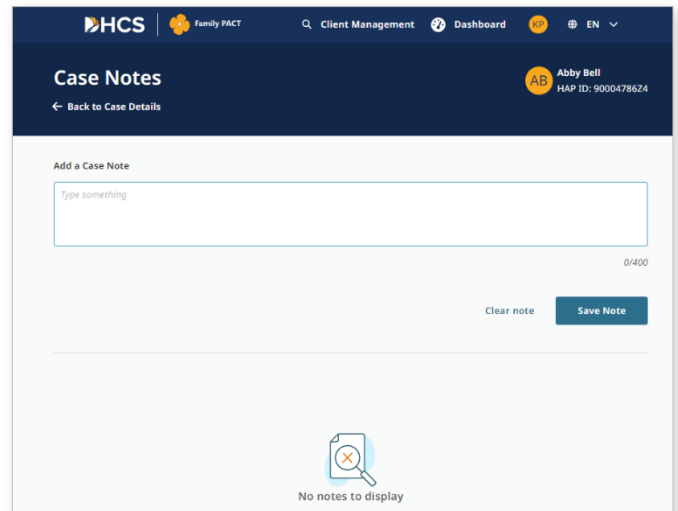
The screenshot shows the 'Case Notes' interface. At the top, there's a navigation bar with 'HCS' and 'Family PACT' logos, and search and dashboard icons. The user 'Megan Sandy' with 'HAP ID: 9004675128' is logged in. Below the navigation, there's a 'Case Notes' header with a 'Back to Case Details' link. The main content area has an 'Add a Case Note' section with a text input field containing the placeholder 'Type something' and a character count '0/400'. Below the input are 'Clear note' and 'Save Note' buttons. The 'Notes History' section below shows a table with columns 'USER ID' and 'DATE', and a row with values '48803' and '09/30/2025'. Below the table is the text 'The client's eligibility has been reaffirmed.' and a pagination indicator '1-1 of 1 items' with navigation arrows.

This screenshot shows a zoomed-in view of the 'Notes History' section. It features a table with two columns: 'USER ID' and 'DATE'. The first row contains the values '639' and '09/29/2025'. Below the table, the text 'The client's eligibility has been reaffirmed.' is displayed. At the bottom, there is a pagination indicator '1-1 of 1 items' and navigation arrows.

This screenshot shows a close-up of the pagination indicator at the bottom of the page. It displays the text '1-1 of 1 items' followed by navigation arrows and a highlighted page number '1'.

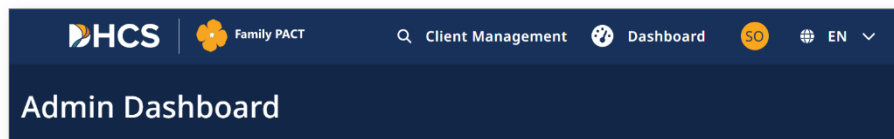
## JOB AID: CLIENT MANAGEMENT PAGES

- Clicking the **Back to Case Details** button navigates the user to the Client Dashboard or *Client Details* page
- The *Add a Case Note* field is disabled for Read-Only Admin
- A *No notes to display* message displays when a case has no notes history



### Super Admin Messages to Clients

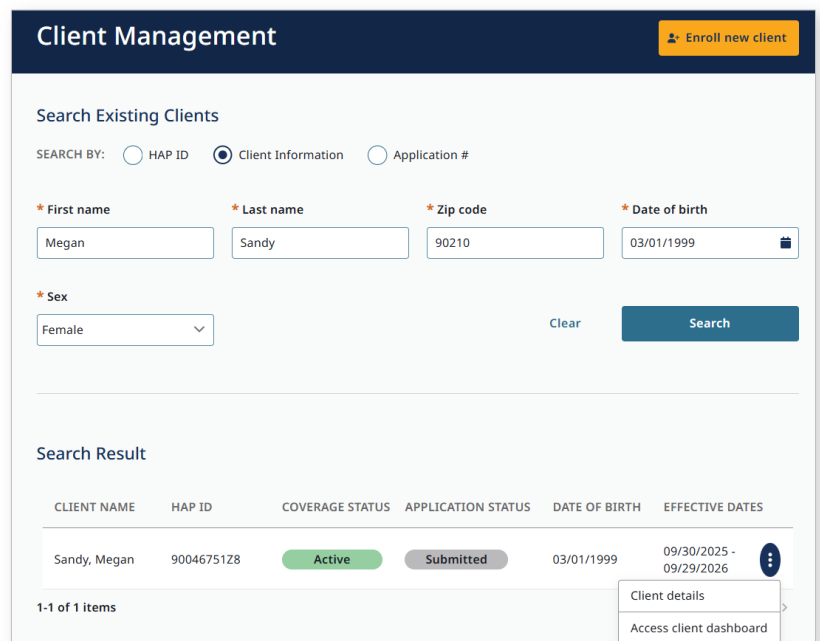
Super Admins may send messages to Client accounts from the *Client Details* page. Clicking the **Client Management** button in the Global header displays the *Client Management* page.



In the *Search Existing Clients* section, Super Admins may search for the Client using one of the following **SEARCH BY:** options:

- **HAP ID**
- **Client Information**
- **Application #**

In the *Search Result* section, selecting **Client details** from the ellipses options navigates the user to the *Client Details* page.



## JOB AID: CLIENT MANAGEMENT PAGES

Clicking the **Send Message** link in the *Access* section displays a *Send Message to Client* popup allowing the Super Admin to send a message to the Client.

The screenshot shows the client management interface for Josh Smith. At the top, the name "Josh Smith" is displayed, along with a "Coverage Status: Active" indicator and a "View HAP card" link. A green notification banner at the top right states: "Great news! The client is eligible for Family PACT! They can use their benefits starting 05/07/2025".

On the left side, there is a navigation menu with a "Back to Client Management" link. Below this, the client's details are listed: Name (Josh Smith), HAP ID (9006347128), Aid Code (8H), and Coverage dates (05/07/2025 - 05/06/2026). A note indicates "(Start date overridden)".

Below the details, there is an "Override Eligibility request: Approved" notification with a link to "Override Eligibility Date" and a "Report a change" button. Further down, there are buttons for "Reaffirm eligibility" and "Discontinue".

At the bottom left, there is an "Access" section with links for "Case History", "Case Notes", "Send Message", and "Client Portal".

On the right side, the "Client Details" section is visible, containing "Basic Information" and "Demographics". The "Basic Information" section includes fields for First name (Josh), Middle name (—), Last name (Smith), Suffix (—), Date of birth (03/01/\*\*\*\*), Social Security Number (Last 4): 4654, Marital status (—), and Client's primary language (English). The "Demographics" section includes fields for "What is the client's race?" (Black or African American) and "Is the client of Hispanic, Latino or Spanish origin?" (—).

Below the demographics, the "Sexual Orientation and Gender Identity" section is partially visible, with the field "What is the client's sex?" set to "Male".

The *Send Message to Client* popup, the **Subject Title** field defines the type of message.

The **Message** text box allows up to 400 characters.

Clicking the **Send to Client** button sends the message to the Client. The message displays in the Client's *Message Center*.

- Clicking the **Cancel** button closes the popup

The screenshot shows the "Send Message to Client" popup form. It has a title "Send Message to Client" at the top. Below the title, there is a "Subject Title" field with a text input box. Underneath, there is a "Message" field with a larger text input box containing the placeholder text "Type something". At the bottom right of the message field, there is a character count "0/400".

At the bottom of the popup, there are two buttons: a large blue "Send to Client" button and a smaller "Cancel" button.