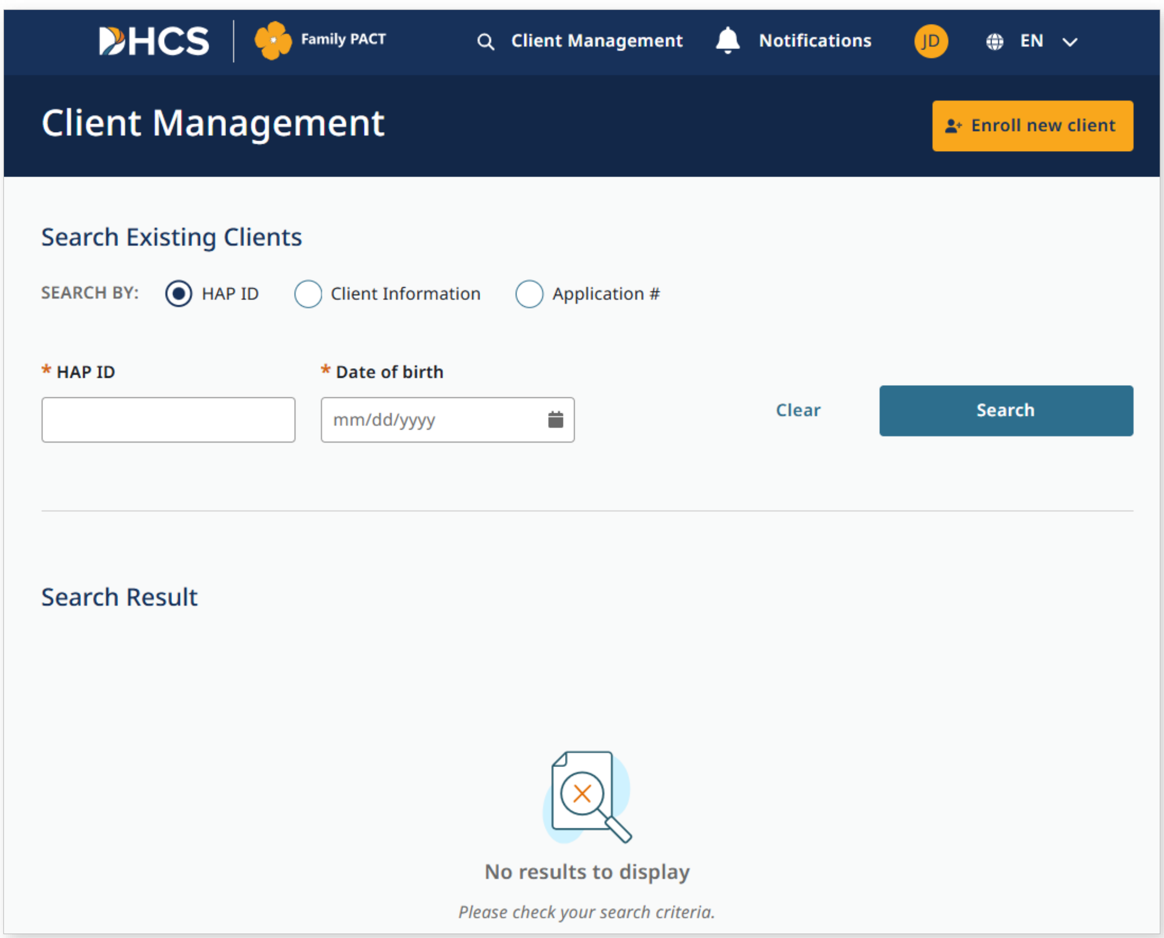
California Healthcare Eligibility, Enrollment, and Retention System

March 16, 2026

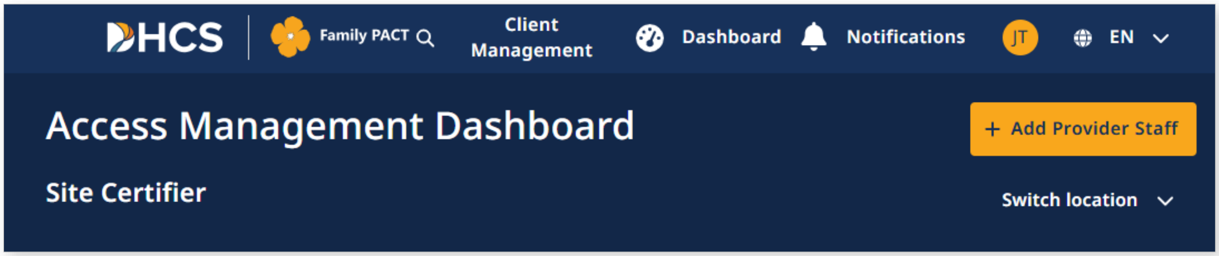
The *Client Management* and *Client Details* pages display summary sections that contain application, eligibility, and transaction type information. This Job Aid is intended for Family Planning, Access, Care, and Treatment (Family PACT) Site Certifiers, Privileged Provider Staff, Provider Staff, Super 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.

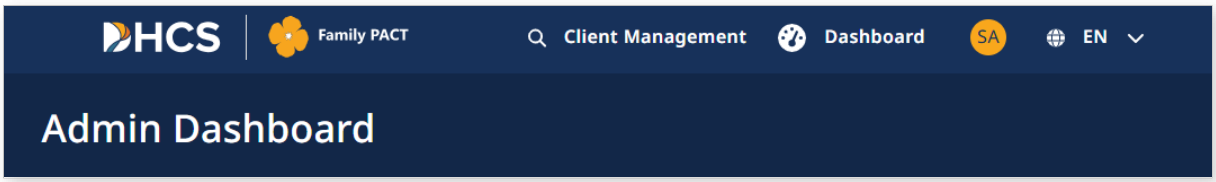
Client Management Page

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.

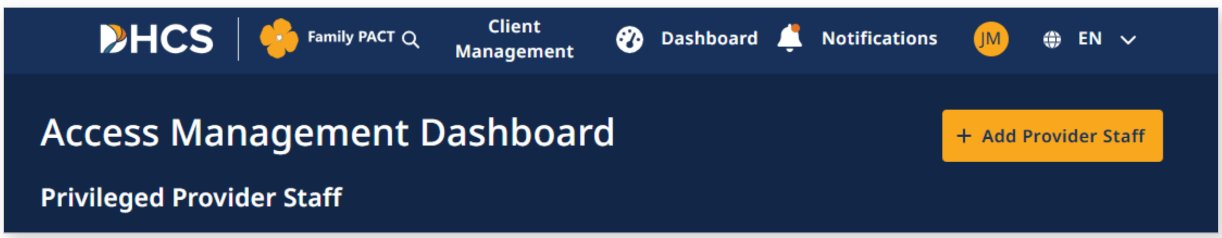


Site Certifiers, Privileged Provider Staff and Super Admins access this page through the **Client Management** button in the Global header. Logging in via the *Log in or create an account to find coverage* page displays the *Access Management Dashboard* as the landing page for the user.





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

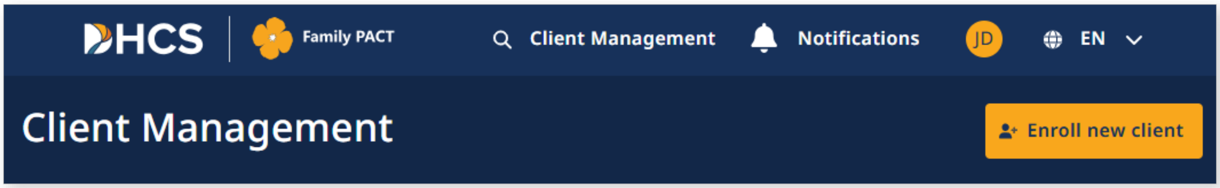


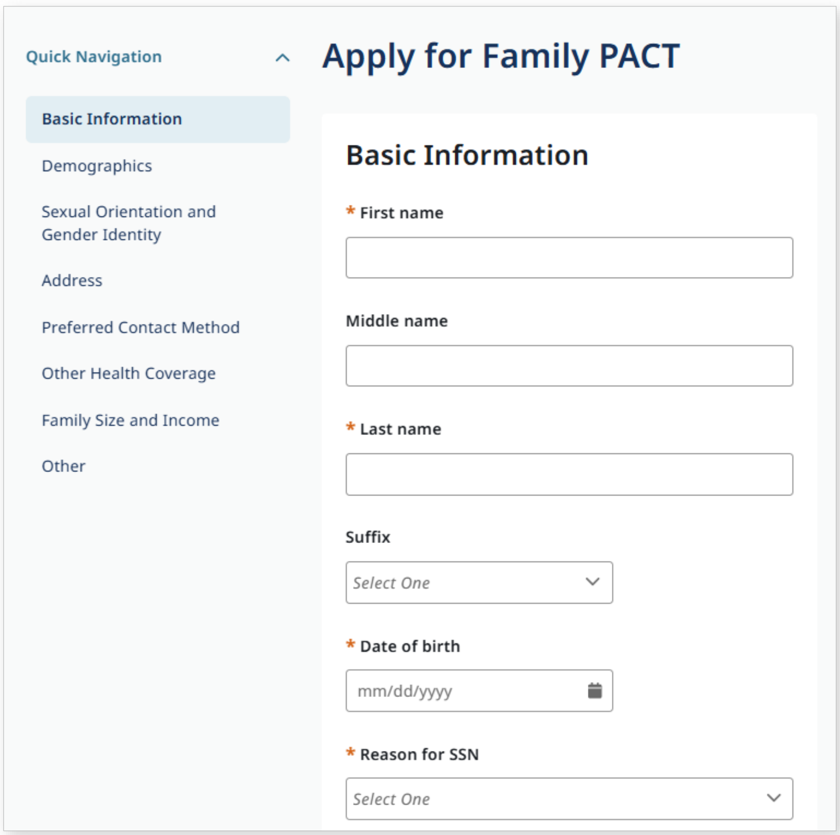
Clicking the **Client Management** button in the Global header navigates the user to the *Client Management* page.

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.

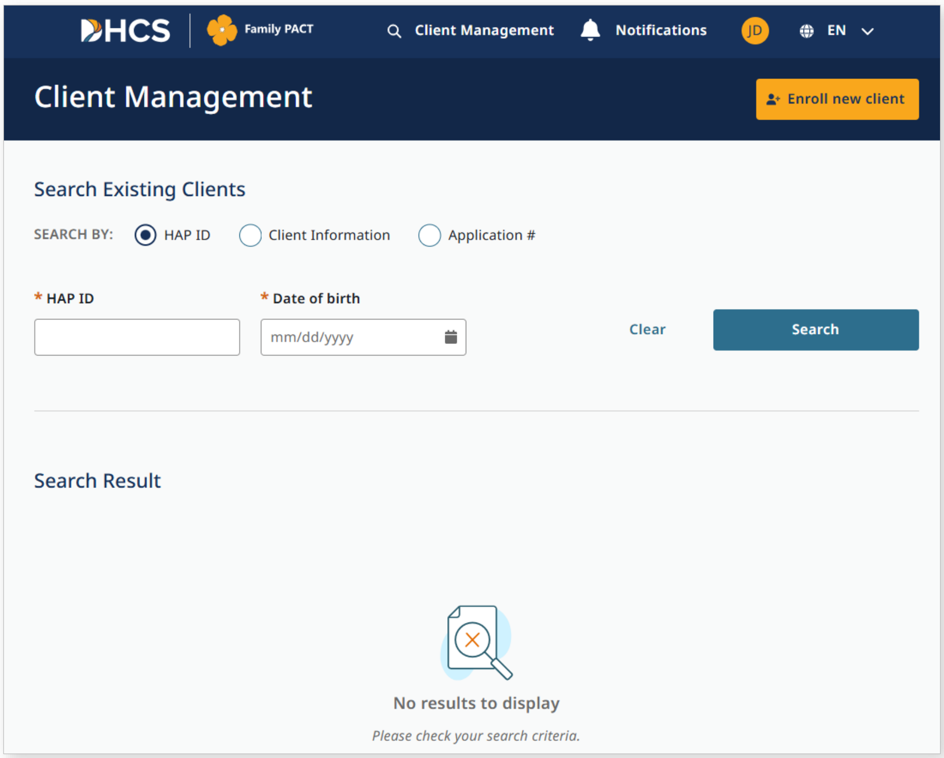




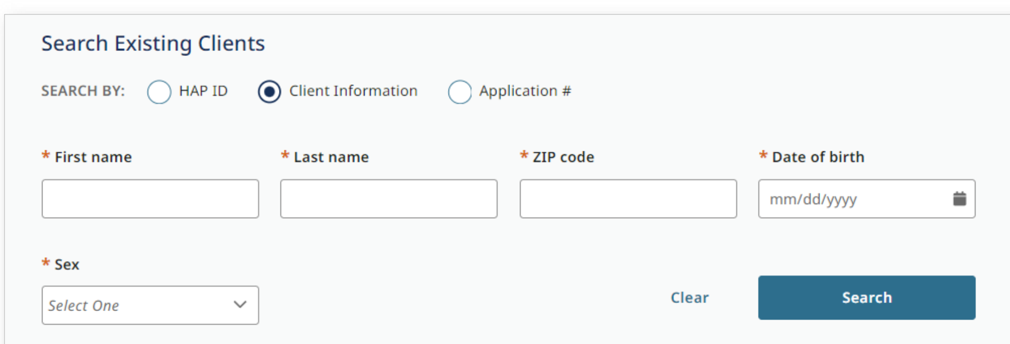
Searching for Existing Clients

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:

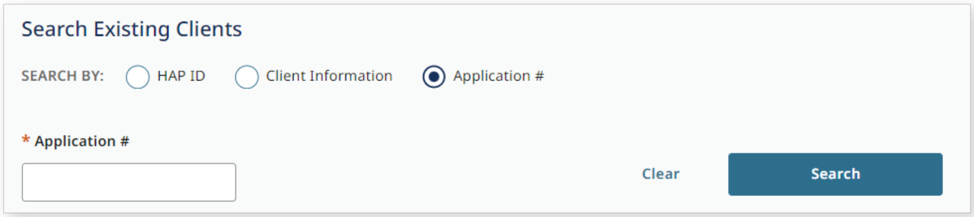
- **HAP ID** – Displays as the default selection with the following fields:
    - **HAP ID** – Enter the 10-digit Health Access Program (HAP) identification number
    - **Date of birth** – Enter the Client's date of birth in [*MM/DD/YYYY]* format or click the **calendar** icon to display a calendar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



- **Client Information** – Displays the following:
    - **First name**
    - **Last name**
    - **ZIP code**
    - **Date of birth**
    - *Sex*



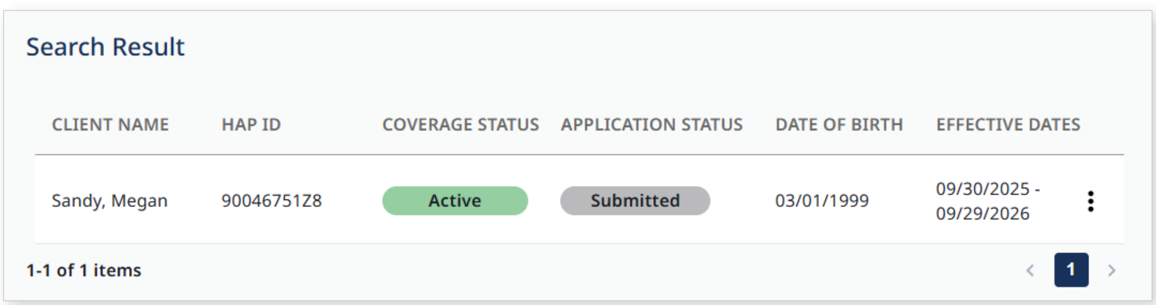
- **Application #** – Displays the **Application #** field allowing a 10-digit application number



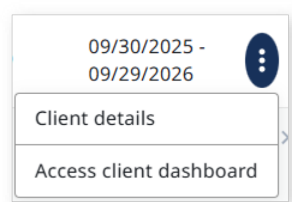
- Clicking the **Clear** button clears the search fields
- Clicking the **Search** button conducts the search and displays applicable results in a *Search Result* section

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

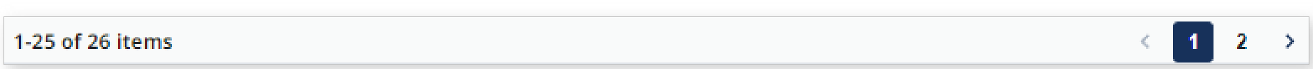


An **ellipsis** icon displays for each of the *Search Result* records. Clicking the **ellipsis** icon displays two options:



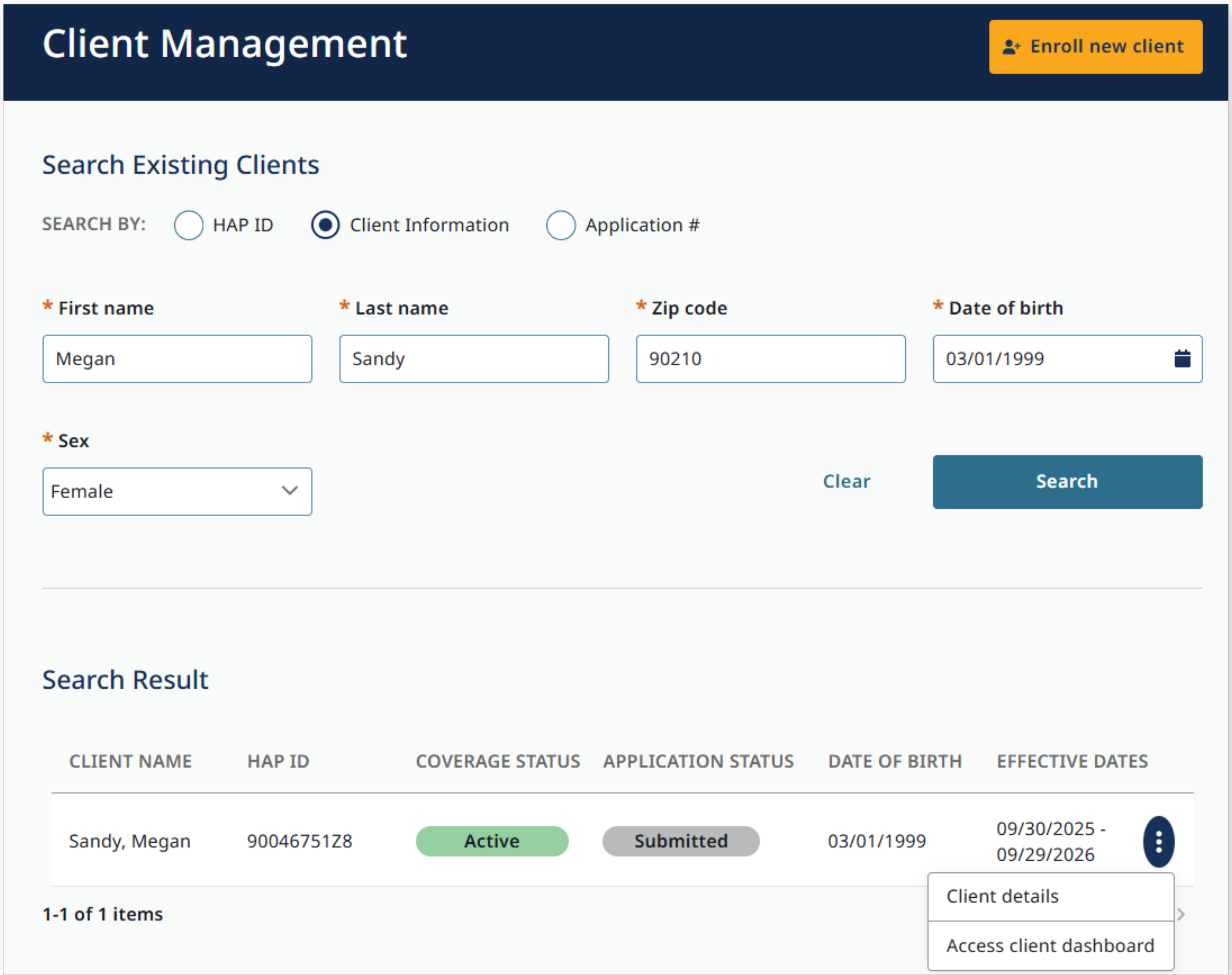
- **Client details** – Navigates the user to the *Client Details* page
- **Access client dashboard** – Navigates the user to the Client Dashboard

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

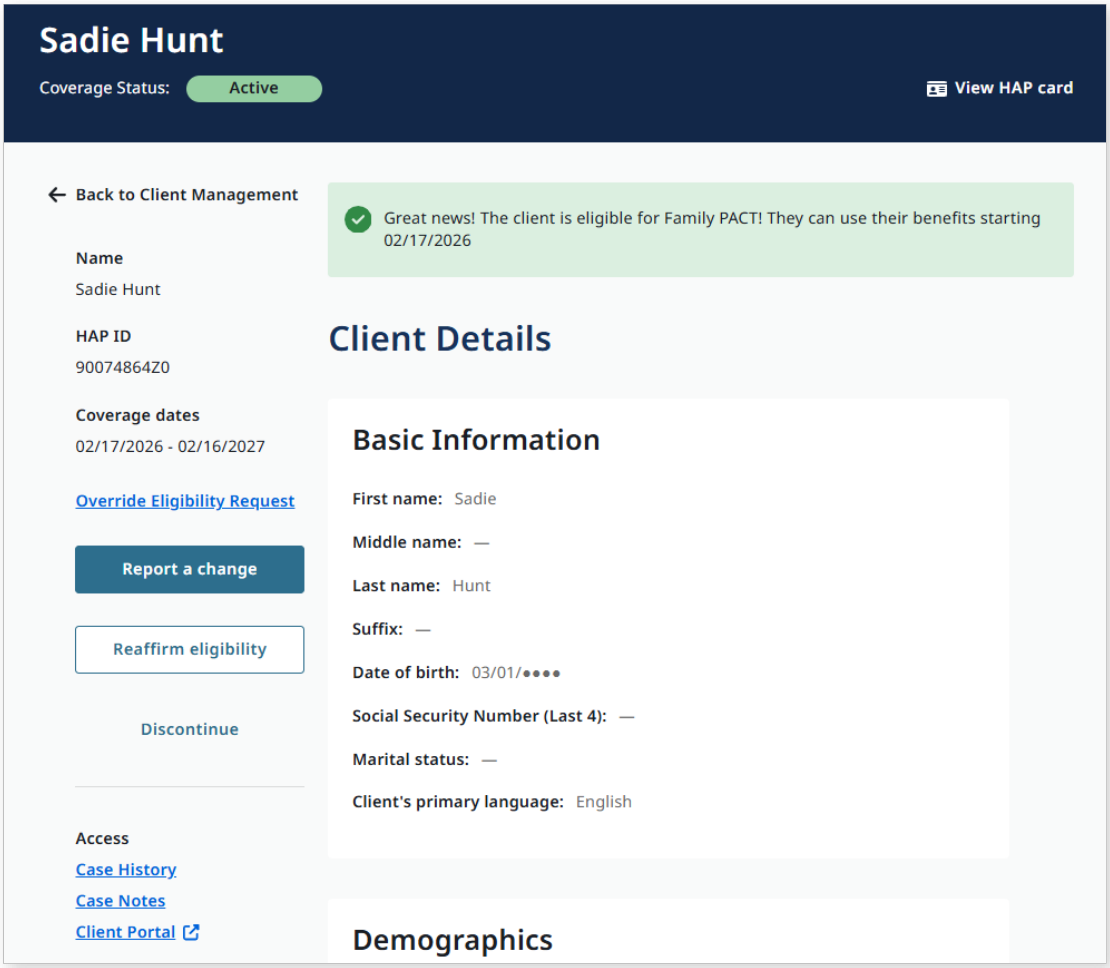


Client Details Page

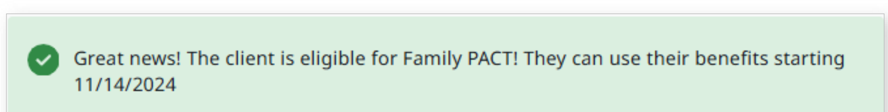
Clicking the **Client details** option available from the **ellipsis** icon on the *Client Management* page navigates the user to the *Client Details* page.



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

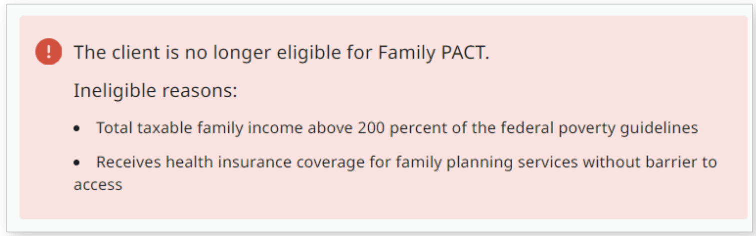


- *Coverage Status* – Dynamically displays the Client's coverage status as *Active* or *Inactive*
- **View HAP card** button – Displays a PDF of the Client's HAP ID card in a new tab
- **Back to Client Management** button – Navigates the Site Certifier or Provider Staff to the *Client Management* page
- Dynamic eligibility information displays based on the Client's case status:
  - A green banner displays for Eligible Clients with their coverage start date

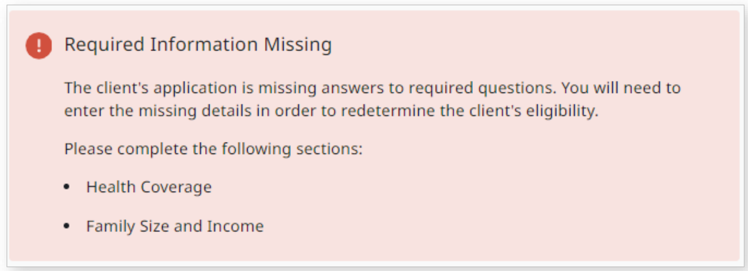


  - The following text displays in a green banner when a RAC or Recertification is completed: *Great news! The client is still eligible for Family PACT! They can keep using their benefits until [MM/DD/YYY]*

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

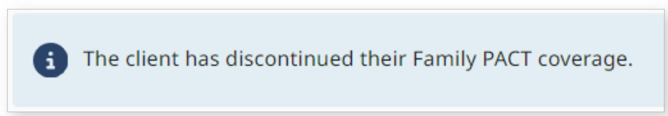


- A red banner displays with a list of incomplete sections when the Client is missing required information

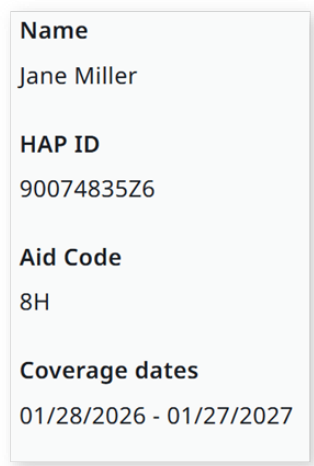


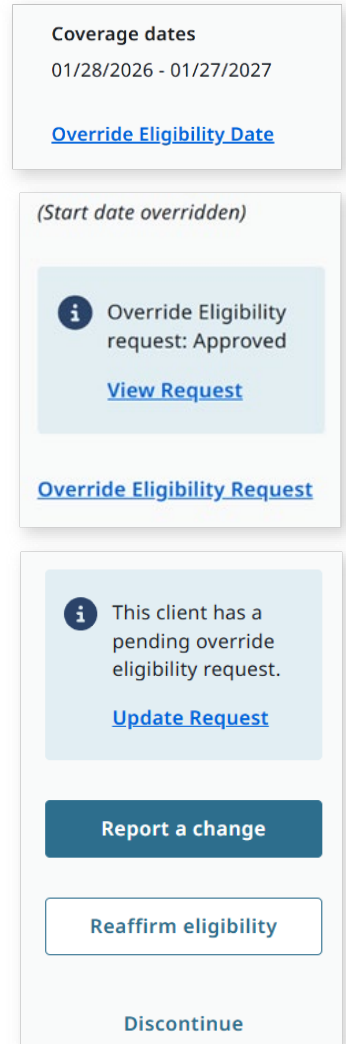
- A yellow banner displays with a recertify by date when the Client is required to recertify their Family PACT coverage

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



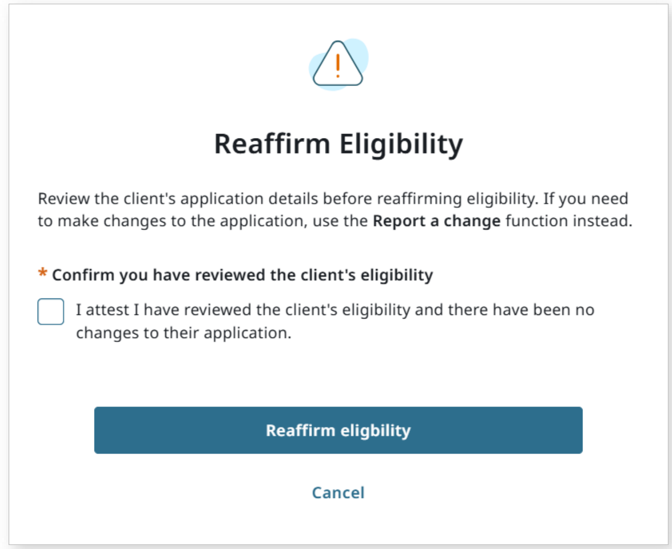
- *Name*
- *HAP ID*
- *Aid Code* – Displays for Super Admin and Read-Only Admin users
- *Coverage dates* – Displays the Client's dates of coverage. A dash (–) displays when Clients are ineligible for Family PACT coverage or when Clients have discontinued their Family PACT coverage



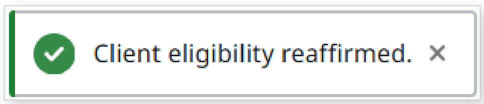


- [**Override Eligibility Date** link – Displays for Super Admin users when an Eligible Client has a coverage start date that can be overridden
- **Override Eligibility Request** link – Displays for Privileged Provider Staff and Site Certifiers when an Eligible Client has a coverage start date that can 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

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



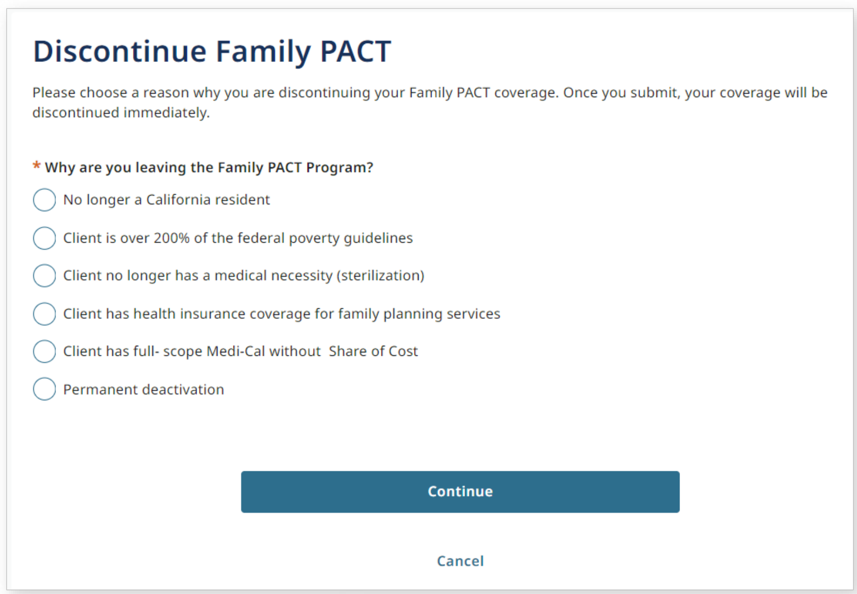
  - Selecting the checkbox confirms no changes to the application
  - Clicking the **Reaffirm eligibility** button reaffirms the Client's eligibility, generates an automated case note, and displays the *Client Details* page with a *Client eligibility reaffirmed.* Message



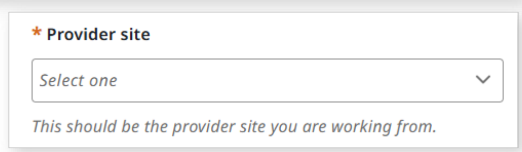
  - Clicking the **Cancel** button closes the popup

- **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

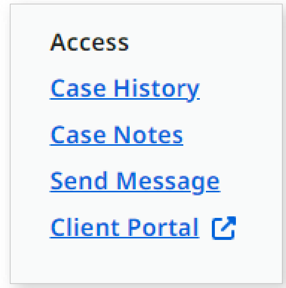


  Note: A *Provider site* dropdown displays for Site Certifiers and Provider Staff who are associated to more than one site location. Users are required to select the site location they are working from.

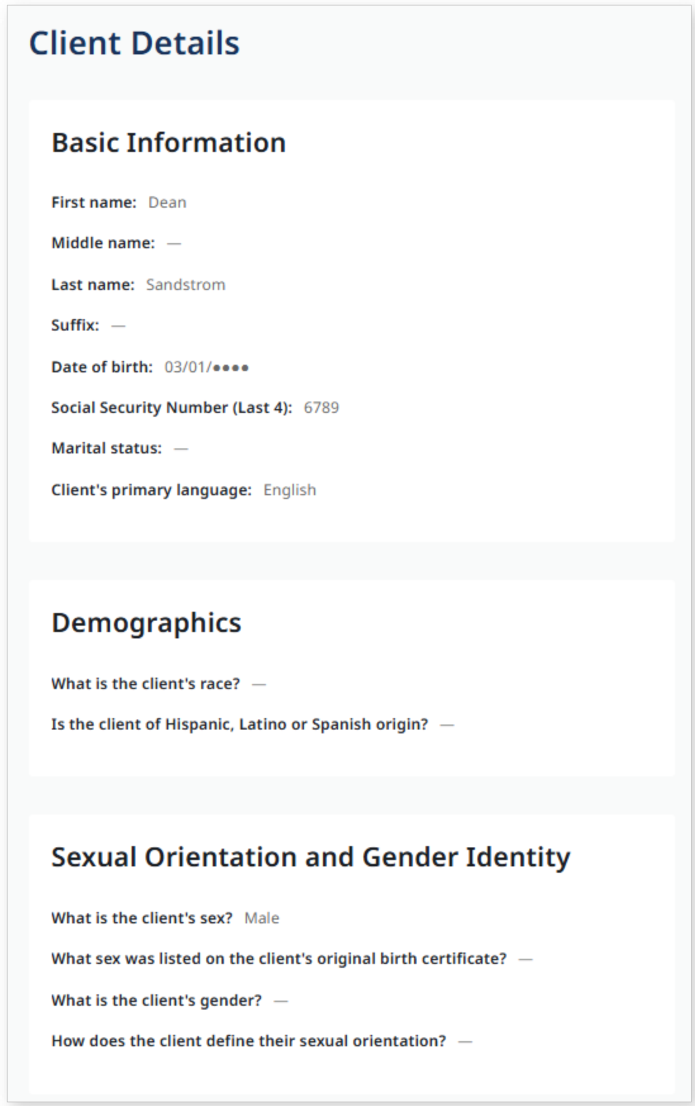


  - Clicking the **Continue** button discontinues the Client from Family PACT coverage and navigates the user to the *Client Details* page
  - Clicking the **Cancel** button navigates the user to the *Client Details* page

- The *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*

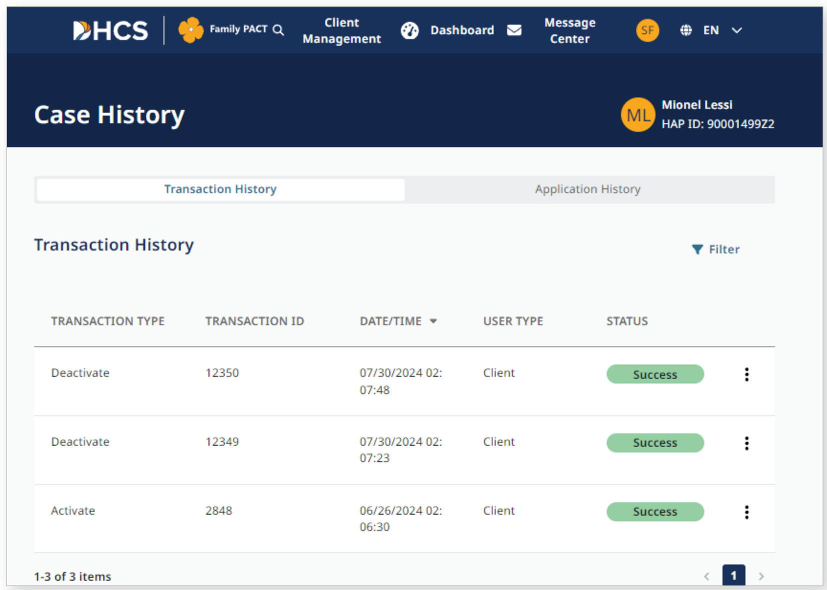


Case History – Admin View

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.

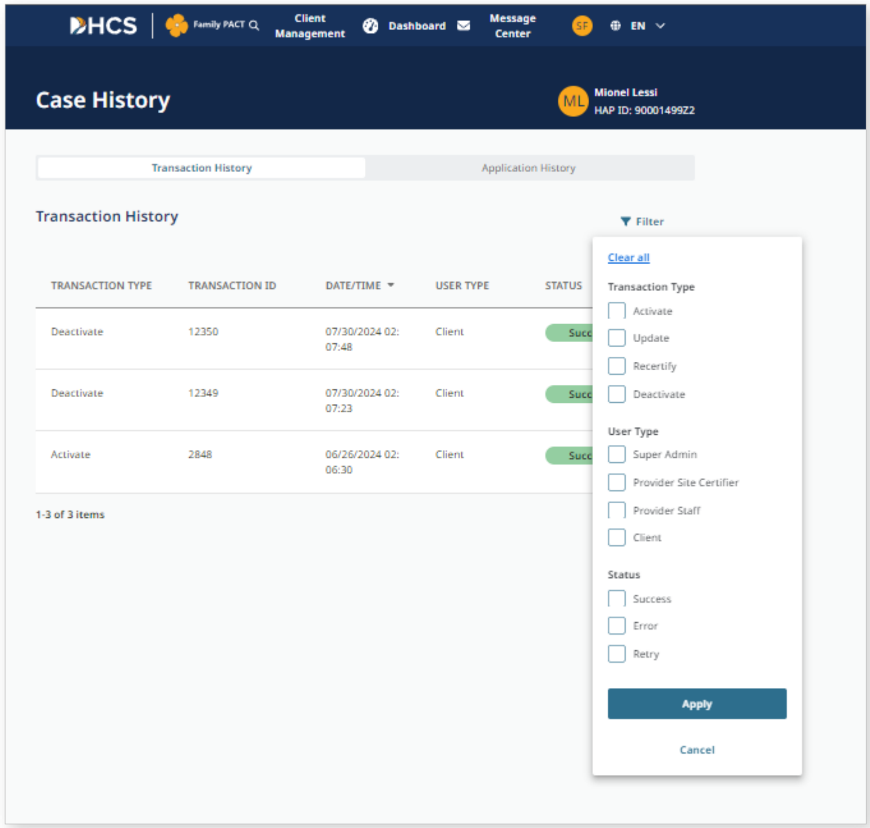
The *Case History* page displays a **Transaction History** tab for Site Certifier, Privileged Provider Staff, Provider Staff, Super Admin, and Read-Only Admin users. The *Transaction History* page displays the following:

- *TRANSACTION TYPE* – Dynamically displays the following based on the transaction type:
    - *Activate*
    - *Deactivate*
    - *Recertify*
    - *Update*



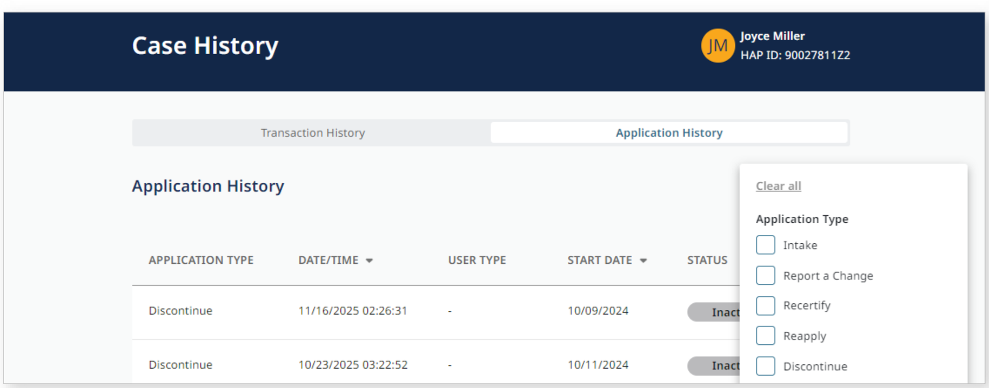
- *TRANSACTION ID* – Displays the unique ID for the transaction
- *DATE/TIME* – The date and time of the application submission
    - A **caret** icon displays to sort the date time from oldest to newest
- *USER TYPE* – Displays the user who submitted the application:
    - *Super Admin*
    - *Provider 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

- *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

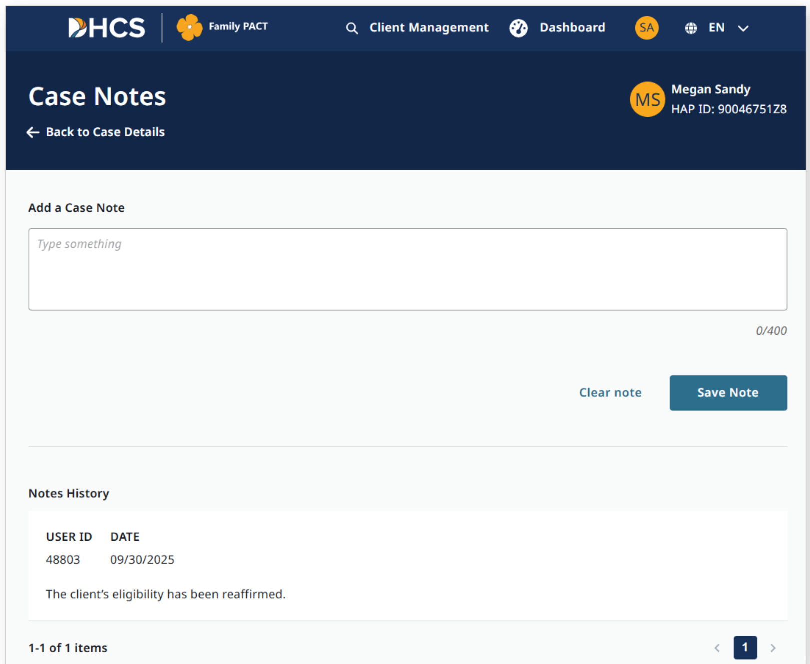
- Clicking the **Application History** tab displays the *Application History* page. The functionality on the *Application History* page is similar to the *Transaction History* page, including the **Filter** option



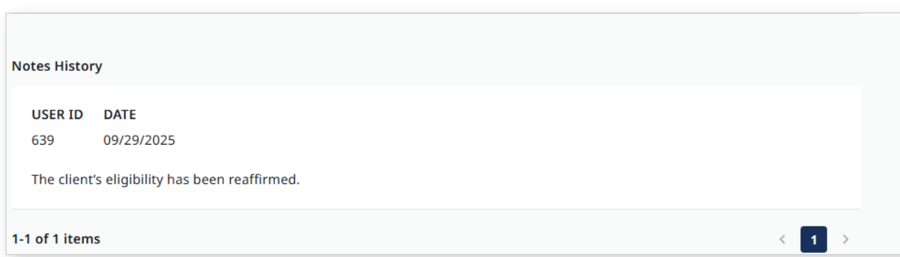
Adding a Case Note

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.

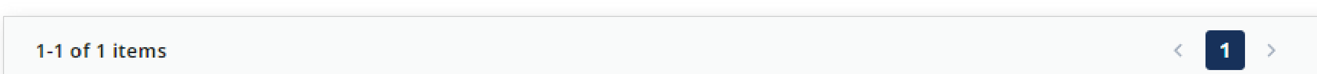
- Users can enter up to 400 characters in the **Add a Case Note** field
  - Clicking the **Clear note** button clears the field
- Clicking the **Save Note** button saves the case note and displays the note in the *Note History* section
- The *Notes History* section displays with the following when case 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



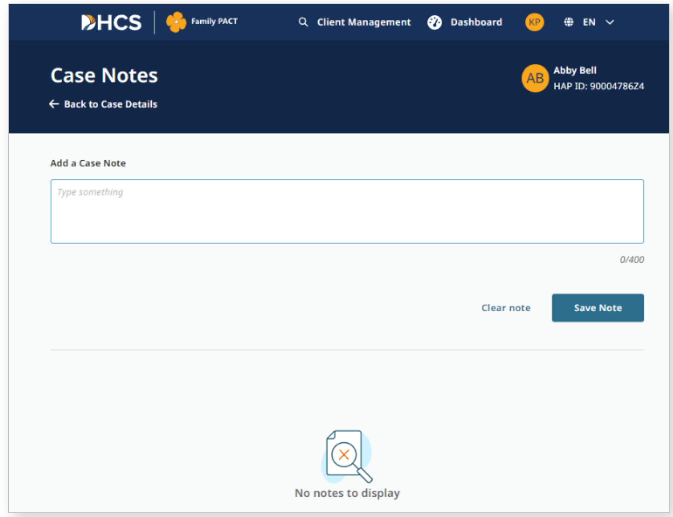
- Reaffirming the Client's eligibility automatically adds a case note
- *[X] of [X] items* – Displays *# of the case note of Total number of case notes*



- Pagination arrows display at the bottom of the page to display additonal case notes when a Client has more than 25 case notes

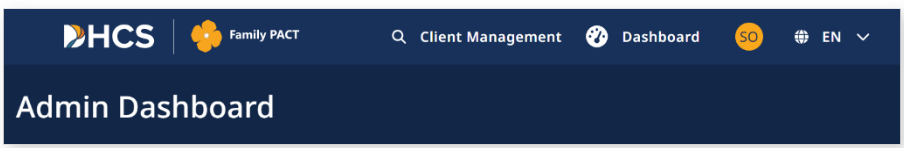


- Clicking the **Back to Case Details** button navigates the user to the Client Dashboard or *Client Details* page
- The *Add a Case Note* field is disabled for Read-Only Admin
- A *No notes to display* message displays when a case has no notes history



Super Admin Messages to Clients

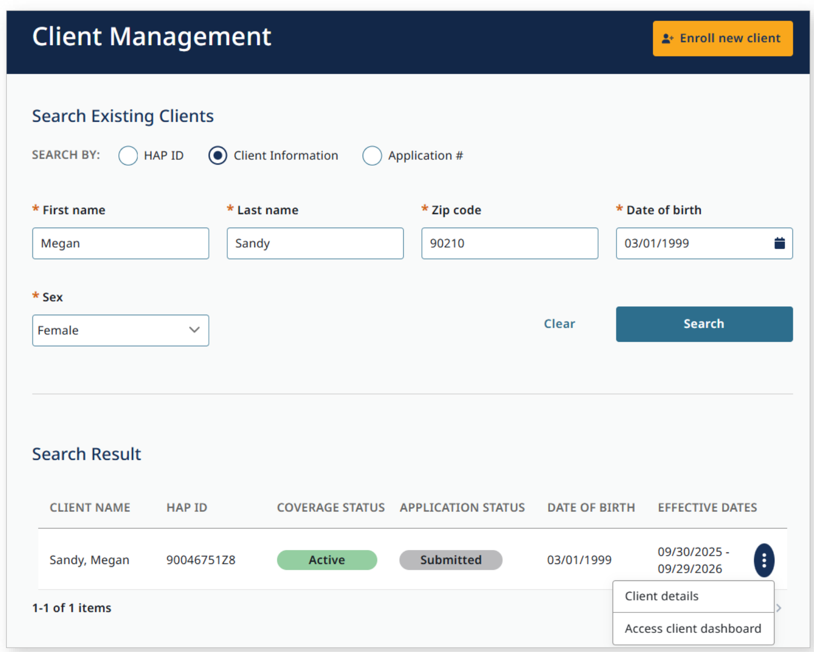
Super Admins may send messages to Client accounts from the *Client Details* page. Clicking the **Client Management** button in the Global header displays the *Client Management* page.



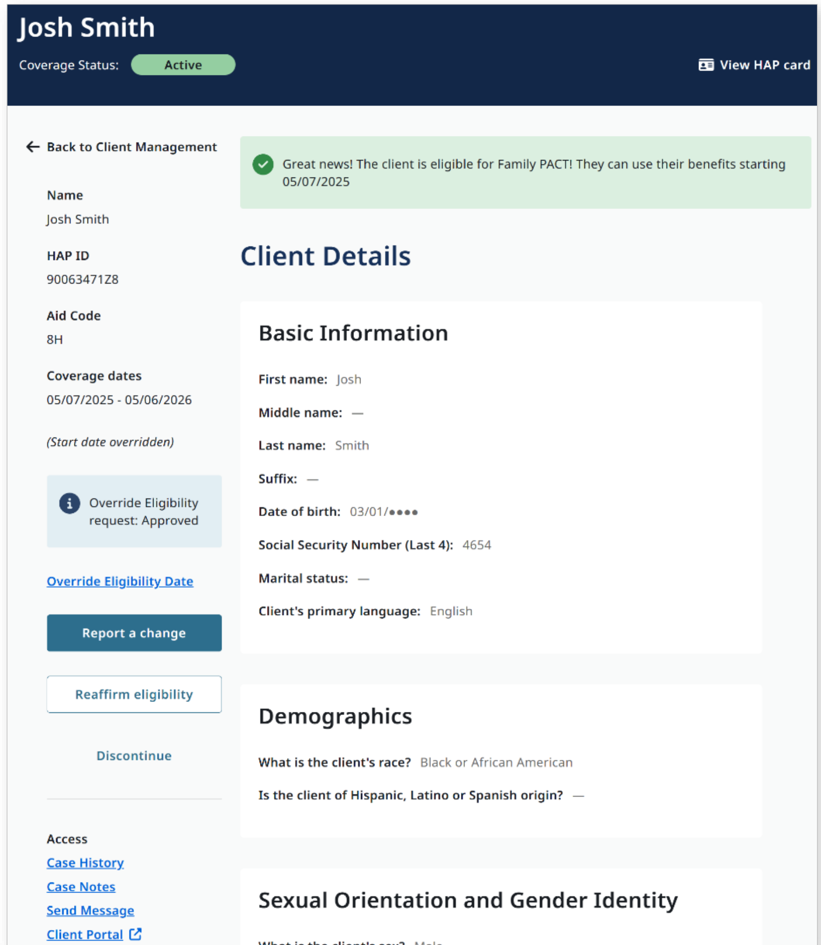
In the *Search Existing Clients* section, Super Admins may search for the Client using one of the following *SEARCH BY: options:*

- **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.



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 *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