



California Healthcare Eligibility,
Enrollment, and Retention System



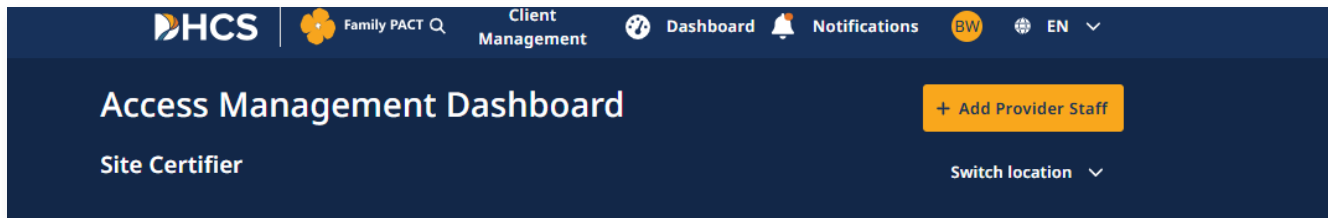
JOB AID: OVERRIDE ELIGIBILITY DATE REQUEST

March 16, 2026

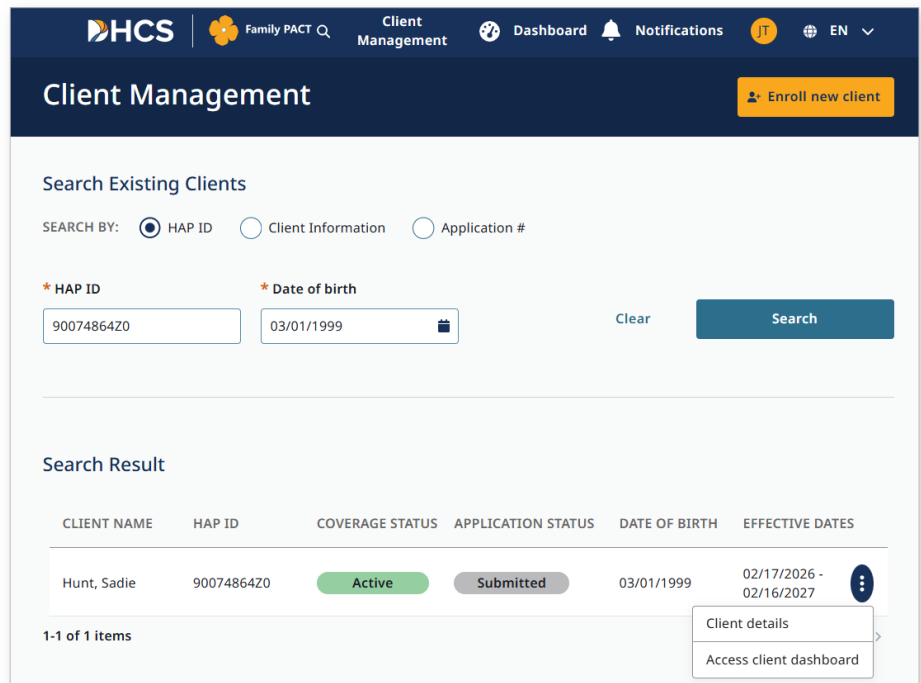
Site Certifiers and Provider staff with Site Certifier privileges may submit a request to backdate a Client's start date up to 90 days. The request to override a Client's start date is then sent to a Super Admin to be approved or denied. This Job Aid is intended for Family Planning, Access, Care, and Treatment (Family PACT) and illustrates the steps to submit, update, and review override requests.

Search for a Client

1. Log into the *Access Management Dashboard* page.



2. Click the **Client Management** button in the Global header. The *Client Management* page displays.
3. Select a **Search By** option to locate the Client.
4. Click the **Search** button
5. Click the **ellipsis** icon in the *Search Results* section and select the **Client details** option. The *Client Details* page displays.



Override Eligibility Start Date Request

1. Click the **Override Eligibility Request** link. The *Create Override Eligibility Request* page displays.

The screenshot shows the HCS Client Management interface for Jane Miller. The top navigation bar includes the HCS logo, Family PACT search, Client Management, Dashboard, Notifications, and language settings (EN). The client's name is Jane Miller, and her coverage status is Active. A green notification banner states: "Great news! The client is eligible for Family PACT! They can use their benefits starting 01/28/2026". The client details section includes: Name: Jane Miller, HAP ID: 9007483526, Coverage dates: 01/28/2026 - 01/27/2027, and a link for "Override Eligibility Request". Action buttons include "Report a change", "Reaffirm eligibility", and "Discontinue". The "Client Details" section shows: First name: Jane, Middle name: —, Last name: Miller, Suffix: —, Date of birth: 03/01/****, Social Security Number (Last 4): 3423, Marital status: —, and Client's primary language: English.

Note: Clicking the **Override Eligibility Request** link when there is an in-flight application displays the *Current In-flight Application* popup informing the user that a Report a Change (RAC) or a Recertification is in progress.

- Clicking the **Continue with override** button displays the *Create Override Eligibility Request* page to submit the request
- Clicking the **Cancel** button closes the popup

The screenshot shows a "Current In-flight Application" popup. It features a warning icon (a triangle with an exclamation mark) and the following text: "An application is currently in progress. If the override eligibility request is approved, this action will override the eligibility start date of the previously submitted application and will cancel the pending, in-flight application." Below the text are two buttons: "Continue with override" (highlighted in blue) and "Cancel" (in blue text).

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2. Enter a date in the **Start date** field or click the calendar **icon** to select a date.

- Hint text displays a date range to select a date

3. Click the **Reason for change dropdown**, select a reason for the coverage start date override:

- **Eligibility determination affected by technical issue**
- **Provider staff did not enter client information at eligibility determination**
- **Inaccurate determination of client ineligibility**
- **Other** – Displays a field for manual entry up to 400 characters

4. Click the **Send Request** button. The *Send Override Eligibility Request* popup displays.
 - Clicking the **Cancel** button cancels the override request and navigates the user to the *Client Details* page

The screenshot shows the 'Create Override Eligibility Request' form in the HCS Client Management system. The form is titled 'Change Start Date' and includes the following fields and options:

- Back to Client Details** (link)
- Name:** Priya Singh
- HAP ID:** 9007483724
- Coverage dates:** 01/28/2026 - 01/27/2027
- * Start date:** 11/30/2025 (with a calendar icon)
- Hint text:** Select a date between 10/30/2025 and 01/27/2026
- * Reason for change:** A dropdown menu with the following options:
 - Eligibility determination affected by technical issue
 - Provider staff did not enter client information at eligibility determination
 - Inaccurate determination of client ineligibility
 - Other
- Character count:** 0/400
- Buttons:** Send Request and Cancel

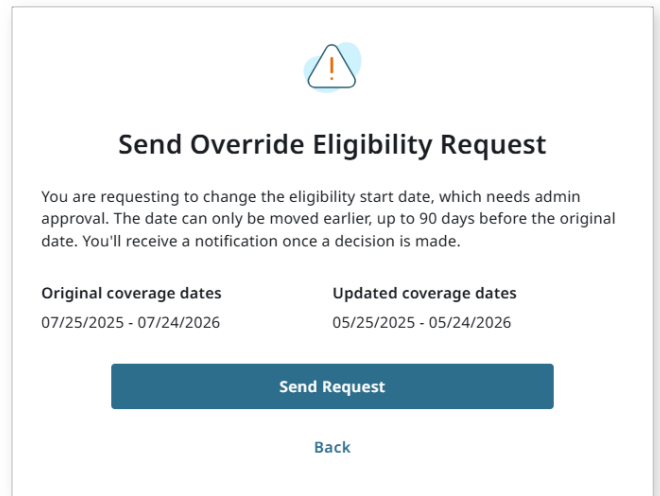
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The *Send Override Eligibility Request* popup displays with the original coverage dates and the requested updated coverage dates.

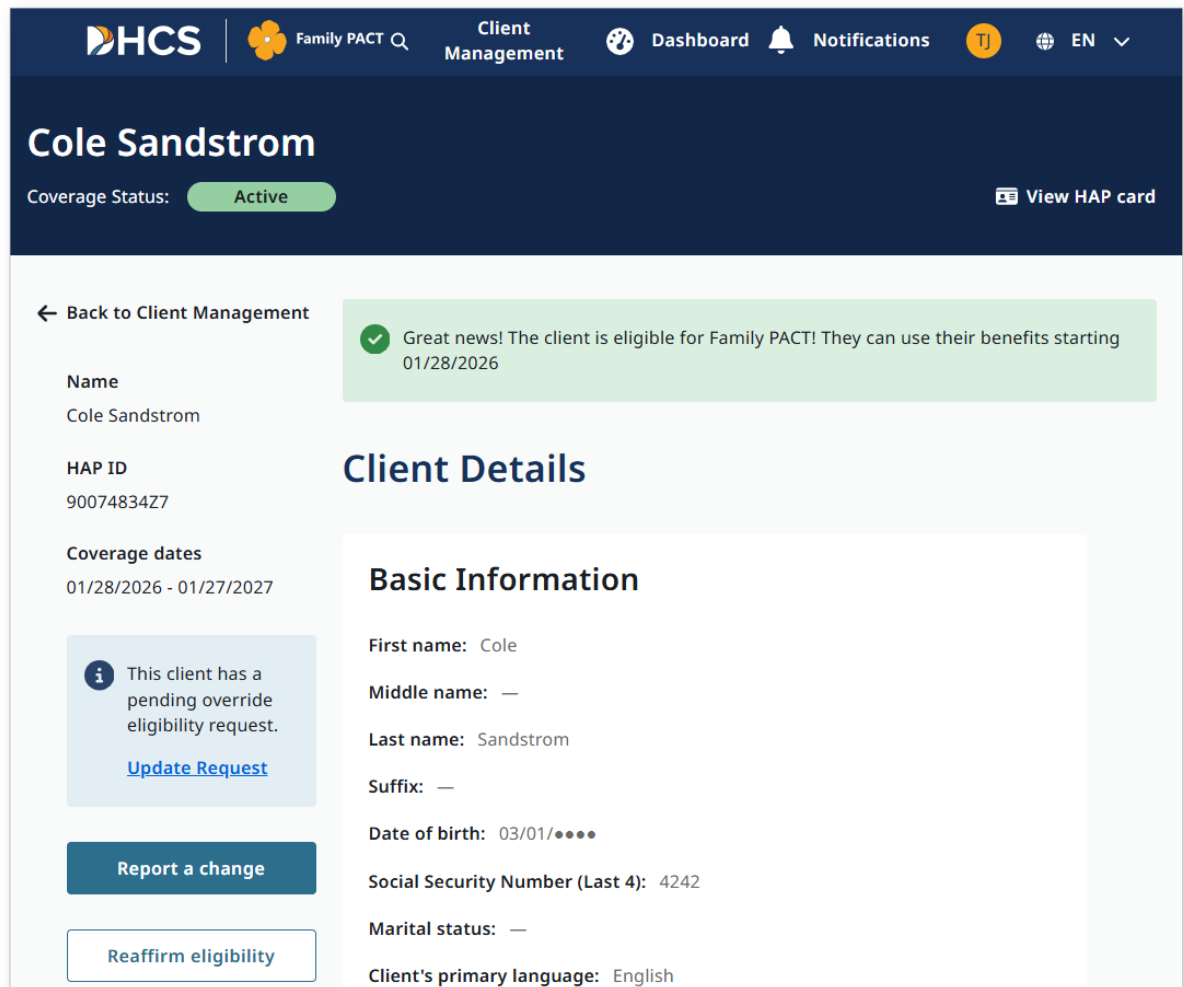
5. Click the **Send Request** button. The override request is sent to the Super Admin and an *Override eligibility request sent* message displays.



- Clicking the **Back** button closes the popup



The *Client Details* page displays a *This client has a pending override eligibility request.* message with an **Update Request** link after completing the override request.

A screenshot of the "Client Details" page for Cole Sandstrom. The page has a dark blue header with the HCS logo, "Family PACT" search, "Client Management", "Dashboard", "Notifications", and user profile "TJ". The client's name "Cole Sandstrom" is prominently displayed, with "Coverage Status: Active" and a "View HAP card" link. A green notification banner at the top right says "Great news! The client is eligible for Family PACT! They can use their benefits starting 01/28/2026". On the left, a light blue box contains an information icon and the message "This client has a pending override eligibility request." with an "Update Request" link. Below this are buttons for "Report a change" and "Reaffirm eligibility". The main content area is titled "Client Details" and "Basic Information", listing: First name: Cole, Middle name: —, Last name: Sandstrom, Suffix: —, Date of birth: 03/01/****, Social Security Number (Last 4): 4242, Marital status: —, and Client's primary language: English.

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Update an Override Eligibility Request

The *Client Details* page displays a *This client has a pending override eligibility request.* message with an **Update Request** link when a Client has a pending override eligibility request. To update a pending override eligibility request:

1. Click the **Update Request** link. The *Update Override Eligibility Request* page displays.

Note: Multiple overrides may be requested up to 90 days prior to the Clients original start date.

Cole Sandstrom
Coverage Status: Active View HAP card

← Back to Client Management

Great news! The client is eligible for Family PACT! They can use their benefits starting 01/28/2026

Name
Cole Sandstrom

HAP ID
90074834Z7

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

This client has a pending override eligibility request.
Update Request

Client Details

Basic Information

First name: Cole
Middle name: —
Last name: Sandstrom
Suffix: —

2. Enter a new date in the **Start date** field or click the **Calendar** icon to select a date.
3. Select a new reason for change by clicking the **Reason for change** dropdown.
4. Click the **Update Request** button. The *Update Override Eligibility Request* popup displays.
 - Clicking the **Cancel update** button closes the popup

HCS | Family PACT | Client Management | Dashboard | Notifications | EN

Update Override Eligibility Request

Request Status: Pending

← Back to Client Details

Name
Cole Sandstrom

HAP ID
90074834Z7

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

Requested by
Tyler James

Date/Time Requested
01/28/2026 06:01 AM

Change Start Date

To override the current eligibility start date, enter the new date below and provide a reason for the change. If the request to save the new start date is approved, it will replace the current eligibility start date.

* Start date
01/06/2026

Select a date between 10/30/2025 and 01/27/2026

* Reason for change
Provider staff did not enter client information at eligibilit... ▾

Update Request

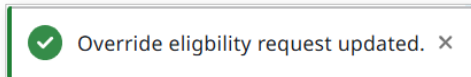
Cancel update

Cancel Override Request

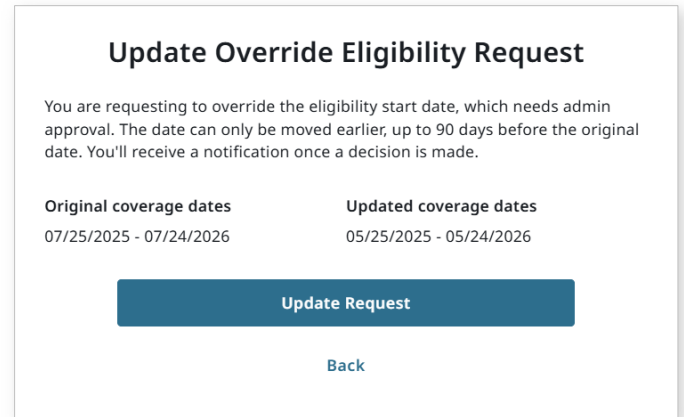
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The *Update Override Eligibility Request* popup displays with the original coverage dates and the updated coverage dates.

5. Click the **Update Request** button. The *Client Details* page displays an *Override eligibility request updated.* message.



- Clicking the **Back** button closes the popup

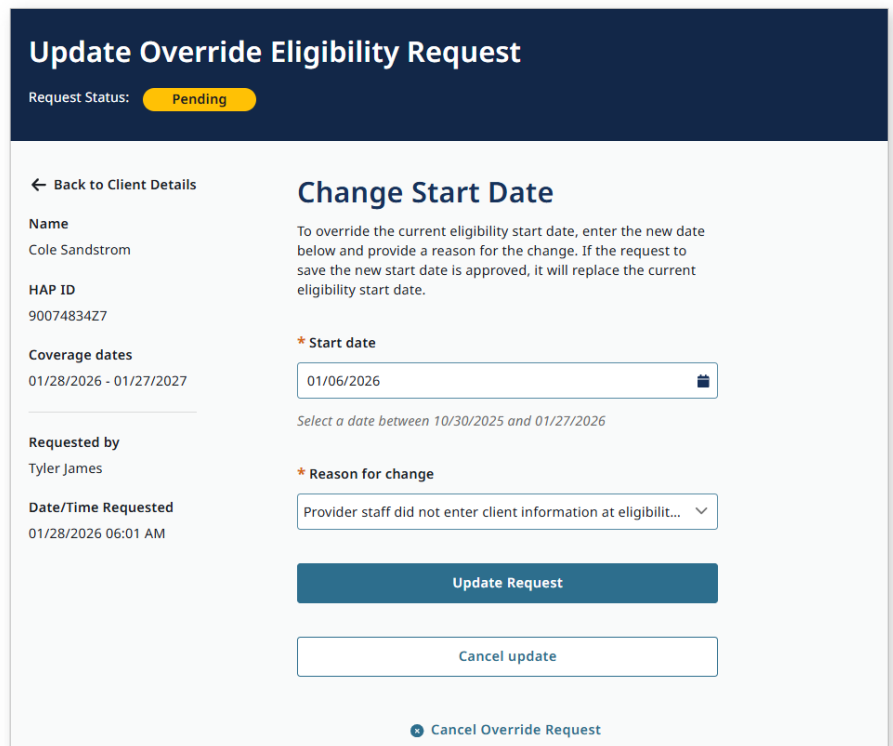
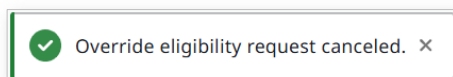
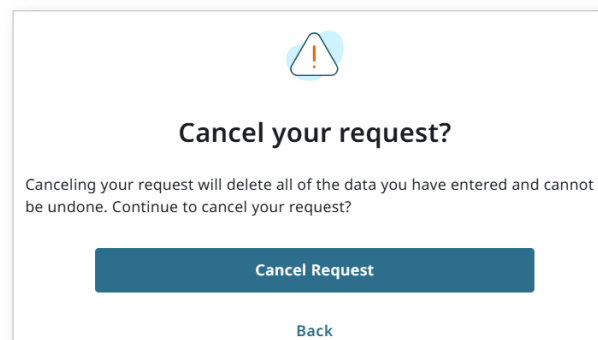
A popup titled "Update Override Eligibility Request". It contains the text: "You are requesting to override the eligibility start date, which needs admin approval. The date can only be moved earlier, up to 90 days before the original date. You'll receive a notification once a decision is made." Below this, there are two columns: "Original coverage dates" with the value "07/25/2025 - 07/24/2026" and "Updated coverage dates" with the value "05/25/2025 - 05/24/2026". At the bottom, there is a blue "Update Request" button and a "Back" link.

Cancel an Override Eligibility Request

Site Certifiers and Privileged Provider Staff may cancel an override request on the *Update Override Eligibility Request* page.

1. Click the **Cancel Override Request** link. The *Cancel your request?* popup displays.
2. Click the **Cancel Request** button. All request information is deleted. *Override eligibility request canceled* messaging briefly displays.

- Clicking the **Back** button closes the popup

A page titled "Update Override Eligibility Request" with a dark blue header. Below the header, it says "Request Status: Pending" in a yellow pill. On the left, there is a sidebar with a "Back to Client Details" link and client information: Name (Cole Sandstrom), HAP ID (9007483427), Coverage dates (01/28/2026 - 01/27/2027), Requested by (Tyler James), and Date/Time Requested (01/28/2026 06:01 AM). The main content area is titled "Change Start Date" and contains instructions: "To override the current eligibility start date, enter the new date below and provide a reason for the change. If the request to save the new start date is approved, it will replace the current eligibility start date." There are two required fields: "* Start date" with a date picker set to 01/06/2026 and a range of "Select a date between 10/30/2025 and 01/27/2026"; and "* Reason for change" with a dropdown menu showing "Provider staff did not enter client information at eligibilit...". At the bottom, there are "Update Request" and "Cancel update" buttons, and a "Cancel Override Request" link.A popup titled "Cancel your request?" with a warning icon. It contains the text: "Canceling your request will delete all of the data you have entered and cannot be undone. Continue to cancel your request?". At the bottom, there is a blue "Cancel Request" button and a "Back" link.

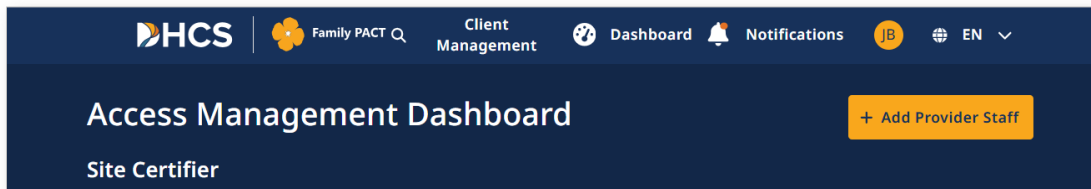
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Review Request

A notification is sent to the user when cancelling a request or when the Super Admin has approved or denied the override eligibility date request.

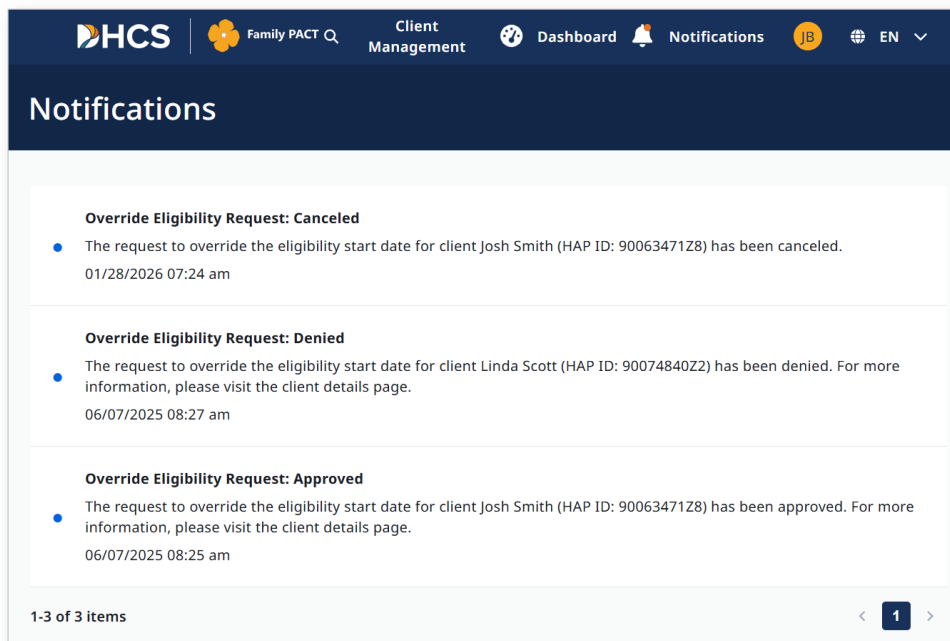
1. Log into the *Access Management Dashboard* page.
2. Click the **Notifications** button. The *Notifications* page displays.

Note: a dot displays on the bell icon when there are unread messages.



The following notification(s) display on the *Notifications* page with the Clients name, HAP ID, and date and time of the notification:

- *Override Eligibility Request: Approved* – The Super Admin has approved the override eligibility date request
- *Override Eligibility Request: Denied* – The Super Admin has denied the override eligibility date request
- *Override Eligibility Request: Canceled* – The user who submitted the request has cancelled the override eligibility request



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The *Clients Details* page displays the current status of the request with dynamic messaging based on the request status.

- *Override Eligibility request: Approved*
- *Override Eligibility request: Denied*
- *Start date overridden to maximum 90 days*
- Clicking the **Review Request** link displays the *Override Eligibility Request* page in read only

The screenshot shows the 'Client Management' interface for 'Nina Mosley'. The top navigation bar includes 'HCS', 'Family PACT Q', 'Client Management', 'Dashboard', 'Notifications', and a user profile 'BW'. The client's name 'Nina Mosley' is prominently displayed, with a 'Coverage Status: Active' indicator and a 'View HAP card' link. A green notification banner states: 'Great news! The client is eligible for Family PACT! They can use their benefits starting 10/05/2025'. The 'Client Details' section is divided into 'Basic Information' and 'Override Eligibility Request'.

Field	Value
Name	Nina Mosley
HAP ID	9007446622
Coverage dates	10/05/2025 - 10/04/2026 (Start date overridden)
Override Eligibility request	Approved View Request
Basic Information	First name: Nina Middle name: — Last name: Mosley Suffix: — Date of birth: 04/18/**** Social Security Number (Last 4): — Marital status: — Client's primary language: English
Actions	Report a change Reaffirm eligibility

The screenshot shows the 'Override Eligibility Request' page. The top navigation bar is identical to the previous screenshot. The page title is 'Override Eligibility Request' with a 'Request Status: Approved' indicator. A 'Back to Client Details' link is visible. The page is split into two columns: client information on the left and request details on the right.

Field	Value
Name	Nina Mosley
HAP ID	9007446622
Coverage dates	01/02/2026 - 01/01/2027
Requested by	Bernice Washington
Date/Time Requested	01/12/2026 01:14 PM
Change Start Date	To override the current eligibility start date, enter the new date below and provide a reason for the change. If the request to save the new start date is approved, it will replace the current eligibility start date.
New start date	10/05/2025
Reason for change	Provider staff did not enter client information at eligibility determination
Reviewer Comment	approved