



California Healthcare Eligibility,
Enrollment, and Retention System

JOB AID: CLIENT CASE HISTORY

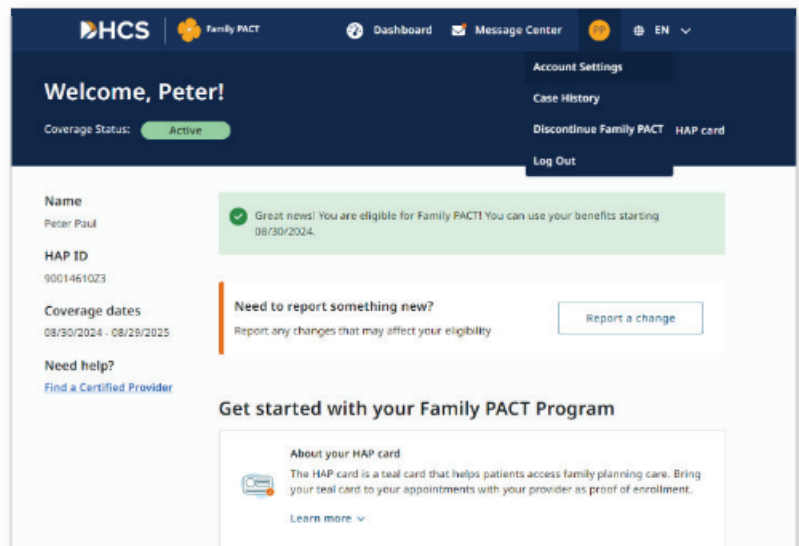
December 13, 2024

This Job Aid illustrates how to view, filter, and search transactions on the *Case History* page. Clients, Super Admin, Provider Staff, Site Certifiers, and Read-Only Admins may use this functionality to view the history of a case. Each transaction that results in an eligibility outcome displays with an **ellipsis** icon with additional options to view more details on the transaction.

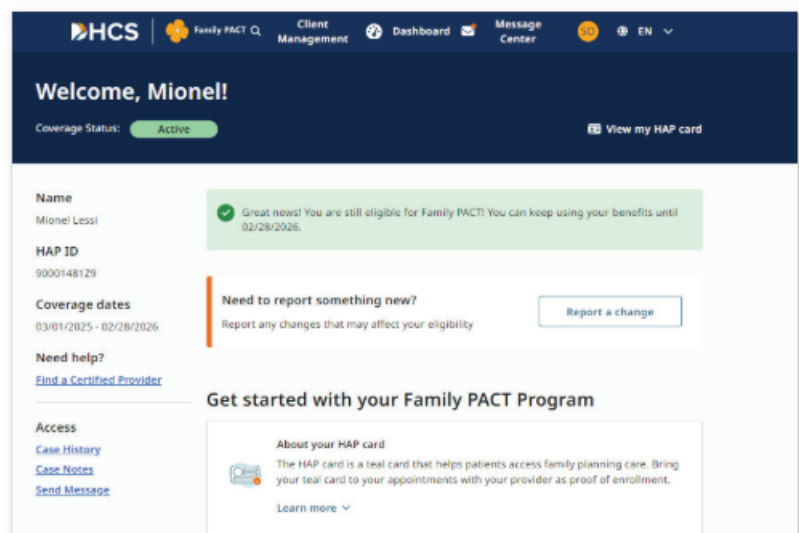
Navigate to Case History

The *Case History* page is available from the Client Dashboard. Clicking the **profile** icon displays the **Case History** link for Clients.

Clicking the **Case History** link navigates the Client to the *Case History* page.



The **Case History** link displays in the Access section for Site Certifiers, Provider Staffs, Super Admins, and Read-Only Admin users.



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Case History

The *Case History* page displays with the following:

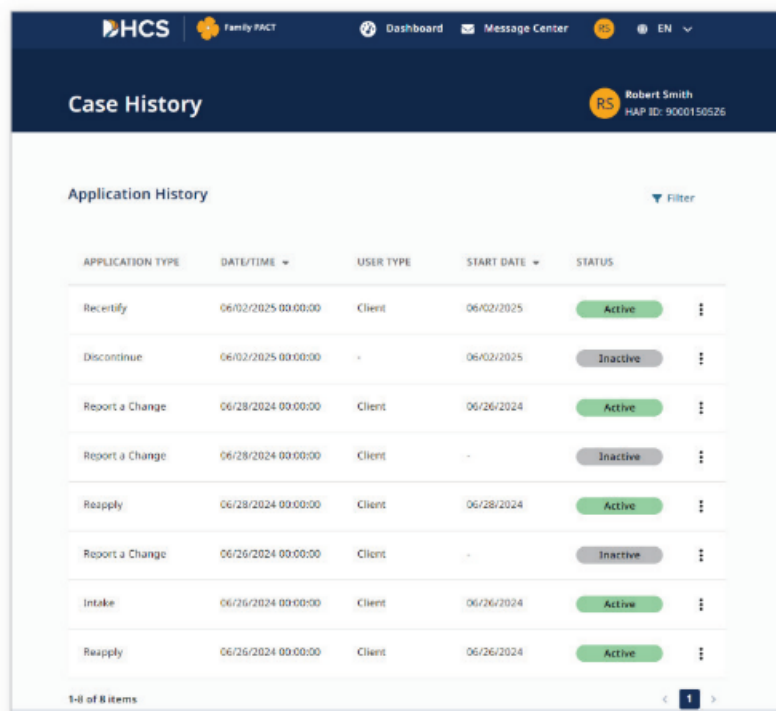
- *[Client's Name]*
- *Hap ID #: [HAP ID#]*
- *Application History*
- **Filter** button

The *Application History* displays any changes made to the Client's application and displays the following columns:

- **APPLICATION TYPE** – Dynamically displays the following depending on the application type:
 - *Discontinue*
 - *Intake*
 - *Reapply*
 - *Recertify*
 - *Report a Change*
- **DATE/TIME** – Displays the date and time the application type was submitted in *[MM/DD/YYYY HH: MM: SS]* format

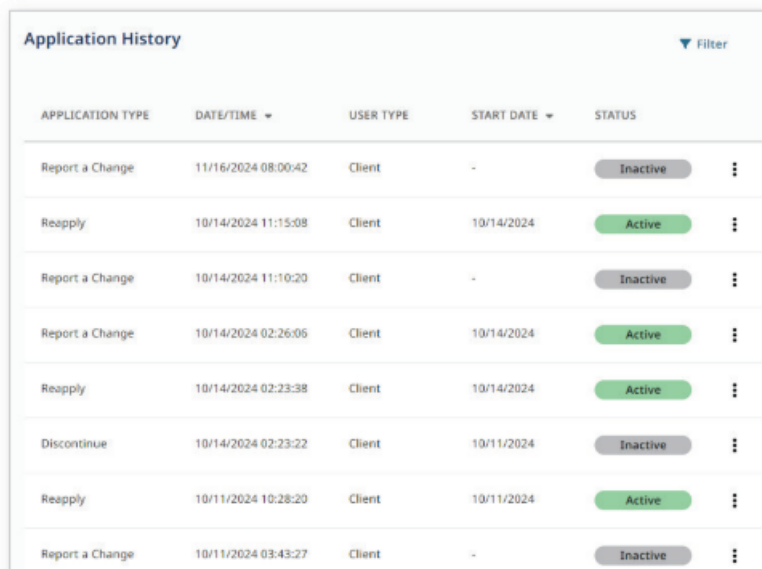
The results display newest to oldest by default. Clicking the caret in the column sorts the results from oldest to newest

- **USER TYPE** – Displays the user who submitted the application. Options that may display include:
 - *Client*
 - *Provider Site Certifier*
 - *Provider Staff*
 - *Super Admin*



The screenshot shows the 'Case History' page for Robert Smith (HAP ID: 900150526). The 'Application History' table lists the following data:

APPLICATION TYPE	DATE/TIME	USER TYPE	START DATE	STATUS
Recertify	06/02/2025 00:00:00	Client	06/02/2025	Active
Discontinue	06/02/2025 00:00:00	-	06/02/2025	Inactive
Report a Change	06/28/2024 00:00:00	Client	06/26/2024	Active
Report a Change	06/28/2024 00:00:00	Client	-	Inactive
Reapply	06/28/2024 00:00:00	Client	06/28/2024	Active
Report a Change	06/26/2024 00:00:00	Client	-	Inactive
Intake	06/26/2024 00:00:00	Client	06/26/2024	Active
Reapply	06/26/2024 00:00:00	Client	06/26/2024	Active



The screenshot shows a different view of the 'Application History' table with the following data:

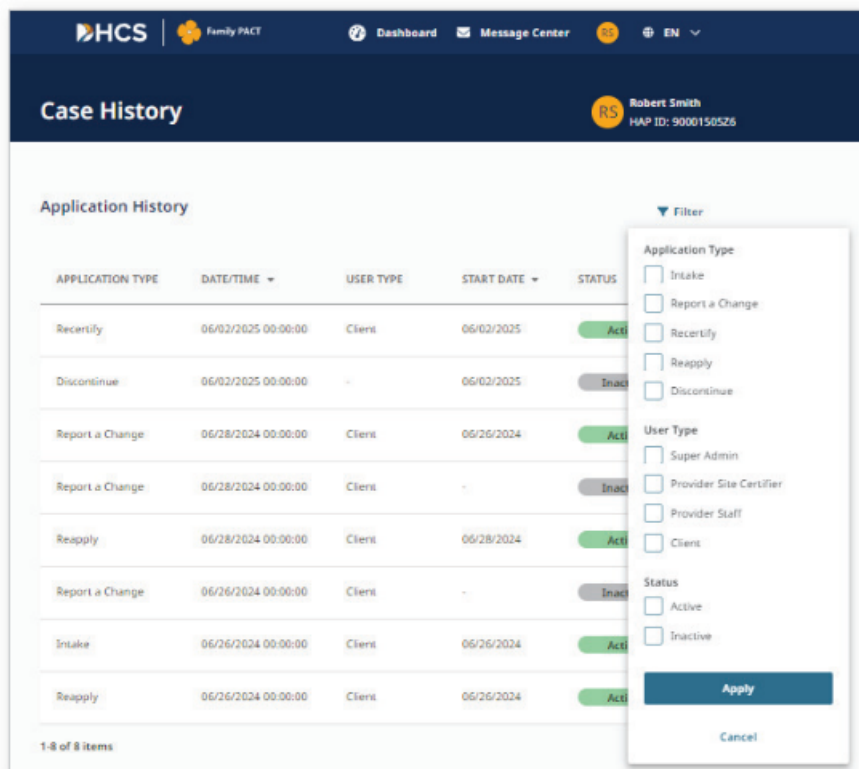
APPLICATION TYPE	DATE/TIME	USER TYPE	START DATE	STATUS
Report a Change	11/16/2024 08:00:42	Client	-	Inactive
Reapply	10/14/2024 11:15:08	Client	10/14/2024	Active
Report a Change	10/14/2024 11:10:20	Client	-	Inactive
Report a Change	10/14/2024 02:26:05	Client	10/14/2024	Active
Reapply	10/14/2024 02:23:38	Client	10/14/2024	Active
Discontinue	10/14/2024 02:23:22	Client	10/11/2024	Inactive
Reapply	10/11/2024 10:28:20	Client	10/11/2024	Active
Report a Change	10/11/2024 03:43:27	Client	-	Inactive

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- **START DATE** – Displays the application submission date
 - Clicking the **caret** icon sorts the results from oldest to newest
- **STATUS** – Displays the eligibility result based on the transaction:
 - *Active*
 - *Inactive*

Clicking the **Filter** icon displays options for the user to filter Application History with the following categories:

- **Application Type:**
 - **Intake**
 - **Reapply**
 - **Report a Change**
 - **Recertify**
 - **Discontinue**
- **User Type:**
 - **Super Admin**
 - **Provider Site Certifier**
 - **Provider Staff**
 - **Client**
- **Status:**
 - **Active**
 - **Inactive**



Clicking the **Apply** button displays filter results. A **[#]** displays next to the **Filter** icon to indicate the number of filters.

A pagination icon displays at the bottom of the page when there are more than 25 records in the *Application History* page.

1-25 of 26 items

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Clicking the **ellipsis** icon next to the *STATUS* column in a transaction row displays the following options:

- **View Application Details** – Displays the application in a PDF, in a new browser window

HCS **Family Pact**
HEALTH CARE SERVICES
<https://hcsfamilypact.org/>

Your Application
Application Date: 06/28/2024

Basic Information

First name: Robert
Middle name: -
Last name: Smith
Suffix: -
Date of Birth: 06/26/1996
Social Security Number (Last 4): -
Marital status: -
Your primary language: English

Demographics
What is your race? -
Are you of Hispanic, Latino, or Spanish origin? No
Sexual Orientation and Gender Identity

APPLICATION TYPE	DATE/TIME	USER TYPE	START DATE	STATUS
Recertify	06/02/2025 00:00:00	Client	06/02/2025	Active
Discontinue	06/02/2025 00:00:00	-	06/02/2025	Inactive
Report a Change	06/28/2024 00:00:00	Client	06/26/2024	Active
Report a Change	06/28/2024 00:00:00	Client	-	Inactive
Reapply	06/28/2024 00:00:00	Client	06/28/2024	-
Report a Change	06/26/2024 00:00:00	Client	-	-

- **View Changes** – Navigates the user to the *Change Log Details* page
- **Ineligibility Reason** – Displays the *Ineligibility Reason* popup listing the reason(s) the transaction found the Client Ineligible and only displays when the status of the application is Inactive.

The following reasons may display:

- *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*

Clicking the **Close** button closes the popup

Ineligibility Reason

- Full scope Medi-Cal (does not have an unmet SOC) without barrier to access

Close

Change Log Details

The *Change Log Details* section displays the application changes during Report a Change, Recertify, and Reapplication. The following displays in the header section of the *Case History* page:

- **Back to Application History** button – Navigates the user to the *Application History* page
- *[Client's First and Last name] HAP ID: [HAP ID #]*
- **APPLICATION TYPE** – Displays the application status prior to the change
- **APPLICATION #** – Displays a unique application ID
- **DATE/TIME** – Displays application date and time submission in *[MM/DD/YYYY] [HH:MM:SS]* format
- **START DATE** – Displays the application submission date
- **STATUS** – Displays status
 - Displays an *Active* status when the Client is eligible
 - Displays an *Inactive* status when the Client is ineligible

APPLICATION TYPE	APPLICATION #	DATE/TIME	START DATE	STATUS
Reapply	20022	04/01/2026 05:52:07	04/01/2026	Active

USER TYPE	CHANGE TYPE	DATE/TIME	CHANGE ELEMENT	OLD VALUE	NEW VALUE
Client	Family Size and Income Change	04/01/2026 05:52:07	Age	-	35
Client	Family Size and Income Change	04/01/2026 05:52:07	First name	-	Mironi
Client	Family Size and Income Change	04/01/2026 05:52:07	Last name	-	Lessi
Client	Family Size and Income Change	04/01/2026 05:52:07	Relationship	-	Self
Client	Family Size and Income Change	04/01/2026 05:52:07	Income Source	-	-
Client	Family Size and Income Change	04/01/2026 05:52:07	Taxable Monthly Income	-	0

The *Change Log Details* section displays the following columns:

- **USER TYPE** – User's login ID
- **CHANGE TYPE** – Displays the changed information
- **DATE/TIME** – The date and time of a submitted change. A **caret** icon displays to sort the date time from oldest to newest
- **CHANGE ELEMENT** – The field updated with a change. Examples include *Age* and *Last name*
- **OLD VALUE** – The previous information that existed prior to the change
- **NEW VALUE** – The updated information in the field listed in *CHANGE ELEMENT* column

Note: A dash (–) displays in a column when there is no information available. The *Change Log Details* page displays blank columns when there is no change made during an application submission.