California Healthcare Eligibility, Enrollment, and Retention System

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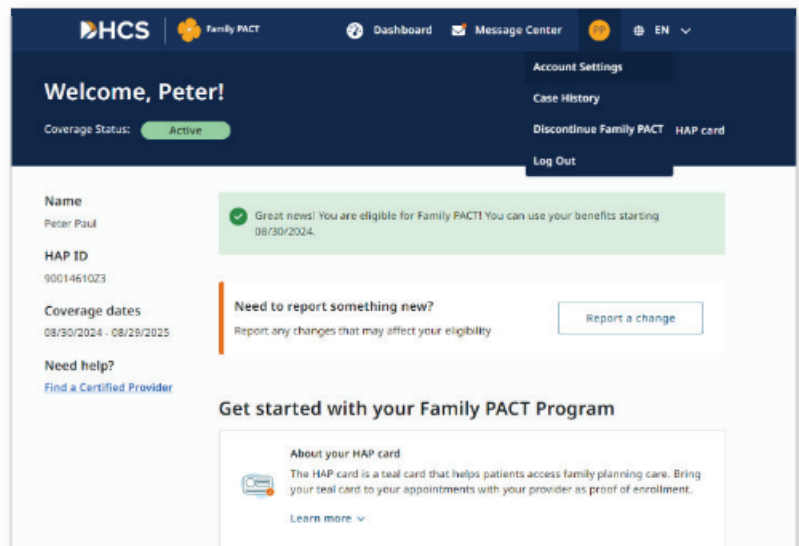
The **Case History** link displays in the *Access* section for Site Certifiers, Provider Staffs, Super Admins, and Read-Only Admin users.
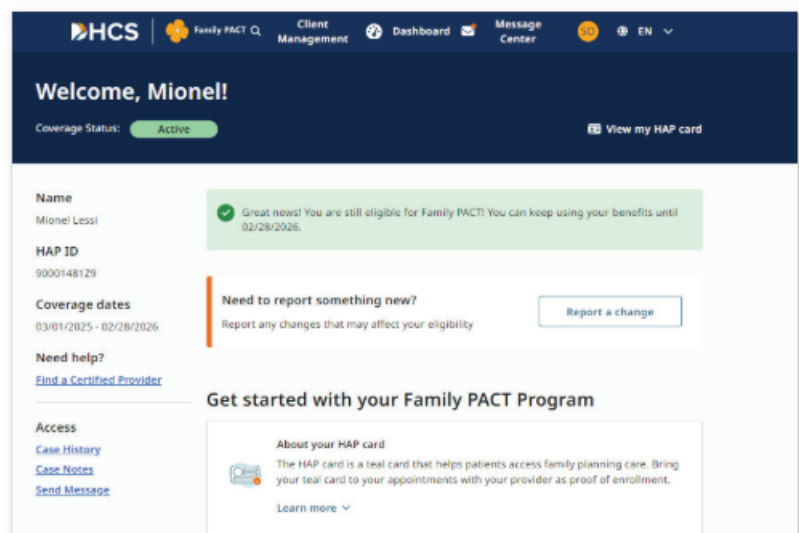
Case History

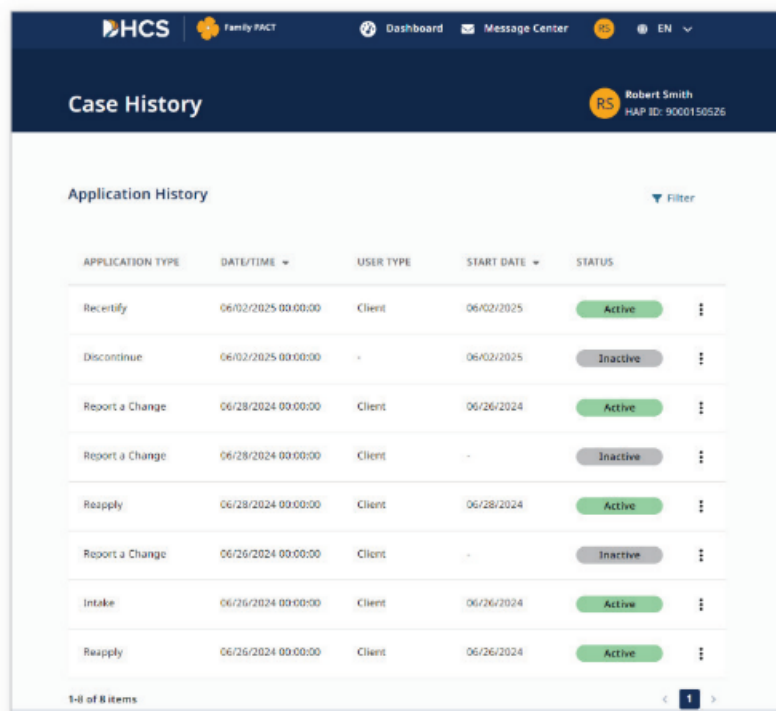The *Case History* page displays with the following:

- *[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:

  o *Discontinue*

  o *Intake*

  o *Reapply*

  o *Recertify*

  o *Report a Change*

- *DATE/TIME* – Displays the date and time the application type was submitted in *[MM/DD/YYYY HH: MM: SS]* format
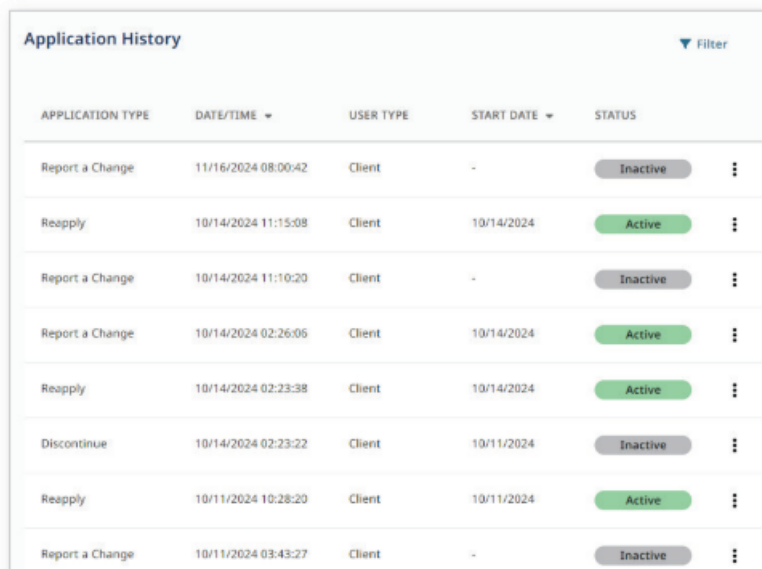
  The results display newest to oldest by default. Clicking the caret in the column sorts the results from oldest to newest

- *USER TYPE* – Displays the user who submitted the application. Options that may display include:

  o *Client*

  o *Provider Site Certifier*

  o *Provider Staff*

  o *Super Admin*

- *START DATE* – Displays the application submission date

    o Clicking the **caret** icon sorts the results from oldest to newest

- *STATUS* – Displays the eligibility result based on the transaction:

    o *Active*

    o *Inactive*

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

- *Application Type*:

    o **Intake**

    o **Reapply**

    o **Report a Change**

    o **Recertify**

    o **Discontinue**

- *User Type*:

    o **Super Admin**

    o **Provider Site Certifier**

    o **Provider Staff**

    o **Client**

- *Status*:

    o **Active**

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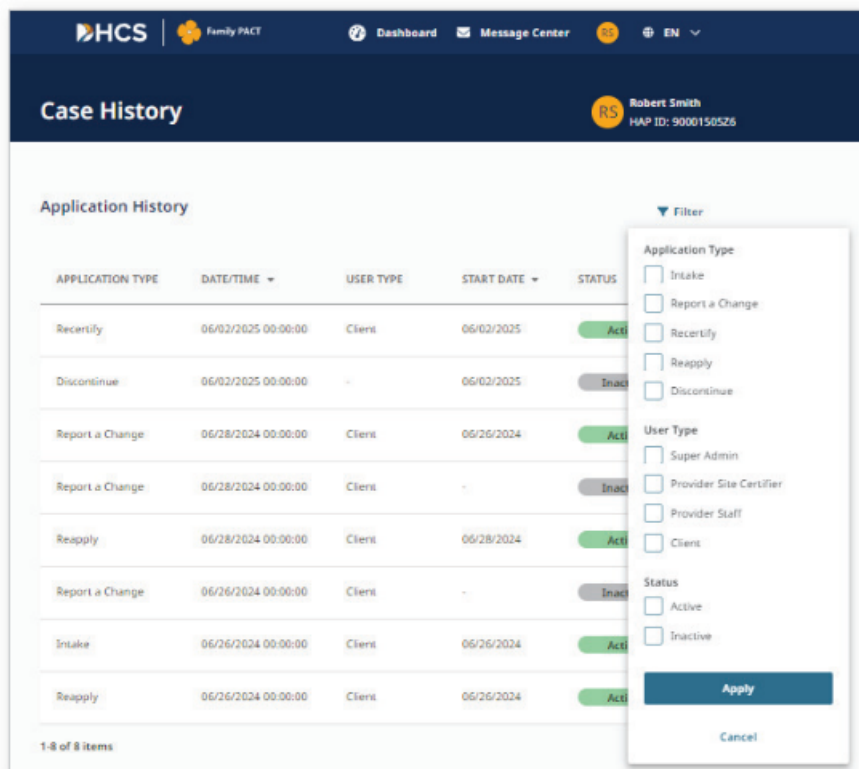
Clicking the **Apply** button displays filter results. A **[#]** displays next to the **Filter** icon to indicate the number of filters.

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

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

- **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:

  o *Below the minimum age of 12*

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

  o *No longer a California resident*

  o *Receives health insurance coverage for family planning services without barrier to access*

  o *Total taxable family income above 200 percent of the federal poverty guidelines*

  Clicking the **Close** button closes the popup

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

  o Displays an *Active* status when the Client is eligible

  o Displays an *Inactive* status when the Client is ineligible

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.