HHSC Benefits Portal and TIERS Inquiry Desk Guide

Community Services Curriculum Development
September 2011

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Introduction to the Desk Guide

With the conversion of System for Applications, Verifications, Eligibility, Reports and Referral (SAVERR) cases into the Texas Integrated Eligibility Redesign System (TIERS), it becomes increasingly important that DADS staff, who currently conduct inquiries in the SAVERR system, become familiar with the inquiry process in TIERS.

Inquiries can be completed in two different ways. DADS staff may use the Health and Human Services Commission (HHSC) Benefits Portal or they may use TIERS.

This Desk Guide provides instruction for completing inquiries on applicants and consumers using both options.

Completing Inquiries Using the HHSC Benefits Portal

When you sign into the system at the portal link below, the HHSC Benefits Portal is the first page you will see. This Portal is not part of TIERS. It is a tool that HHSC staff use to help manage tasks that relate to TIERS cases. Much of the information in the Portal comes from TIERS. Inquiry into this system provides basic information on the applicant's/consumer's program coverage. Note: In order to view Managed Care information and Medicaid History, you will need to use TIERS, not the Portal.

Permissions

DADS staff must have permission to log into the HHSC Benefits Portal and TIERS. Therefore, you will work with your manager to determine permissions and profile. The profile determines the screens you will see when in the Portal and in TIERS.

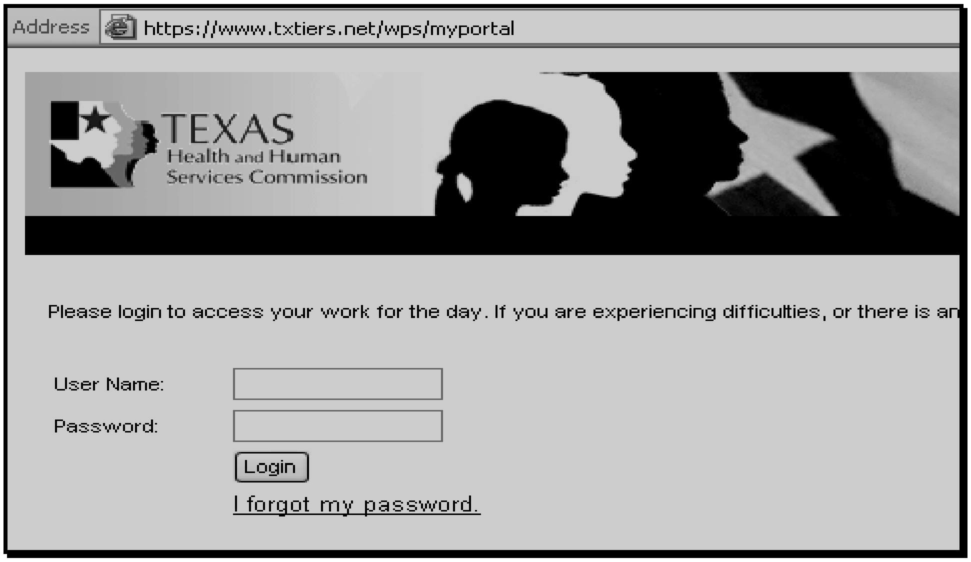
In order to log into the HHSC Benefits Portal, you will need the URL, a user name and a password. The URL for the Portal is:

https://www.txtiers.net/wps/myportal

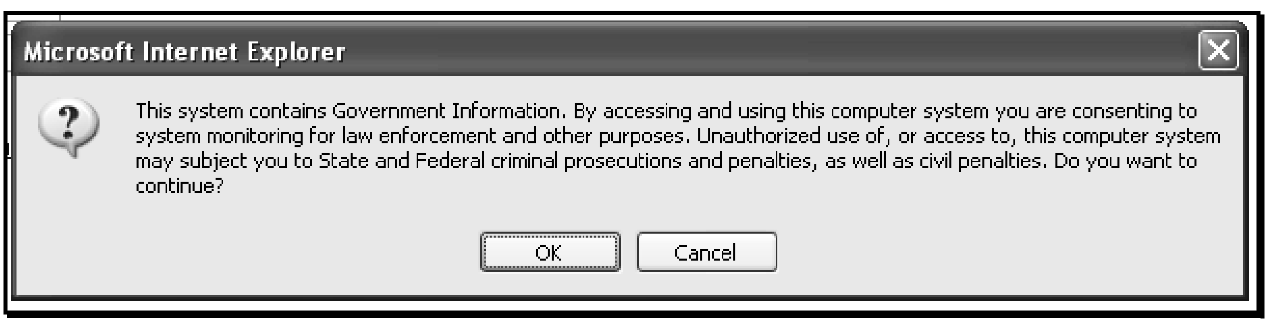
You will receive your sign-on information from the TIERS Provisioning Team.
If you ever forget your password, you may click on the link "I forgot my password" to get your password reset. It is important to sign into the Portal at least once every 90 days to avoid losing your access.

Logging Into the HHSC Benefits Portal:

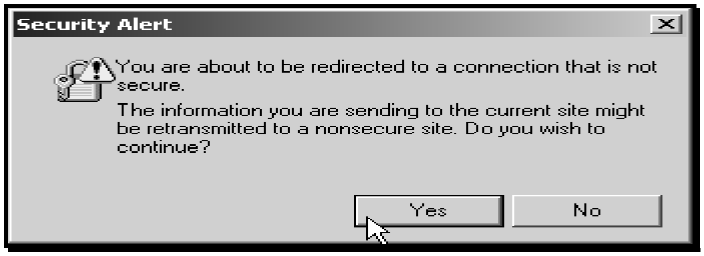
1. Access the HHSC Benefits Portal URL.
2. Enter your *User Name*.
3. Enter your *assigned password*.
4. Click *Login.*



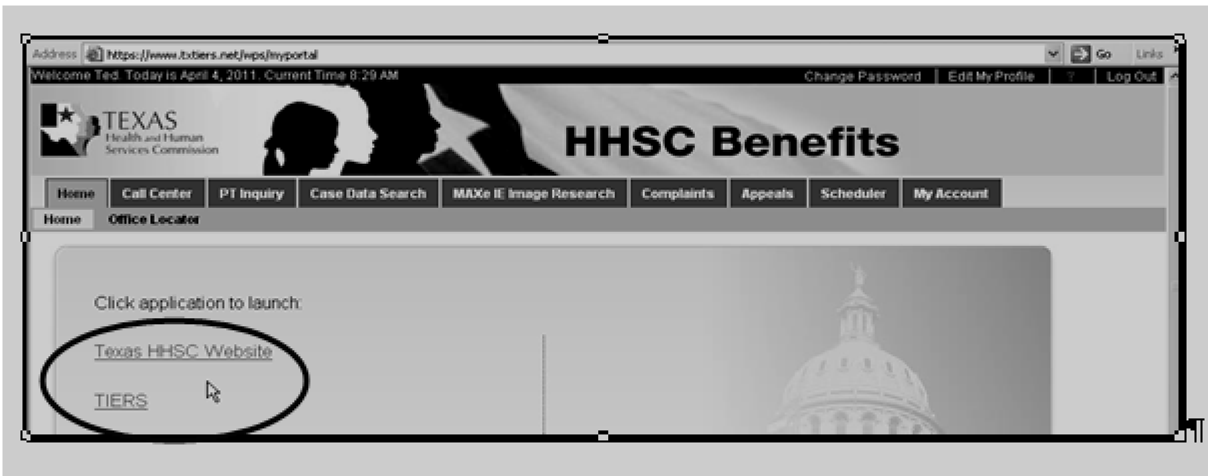
5. You will see the following Government Information alert. After reading the alert, click *OK.*



6. You will see a security alert after you log into the system. After reading the alert, click *Yes*.



7. You will see the HHSC Benefits Portal Welcome Page. You can access the Texas HHSC Website and TIERS from this Welcome page as well.



Completing Inquiries in the HHSC Benefits Portal

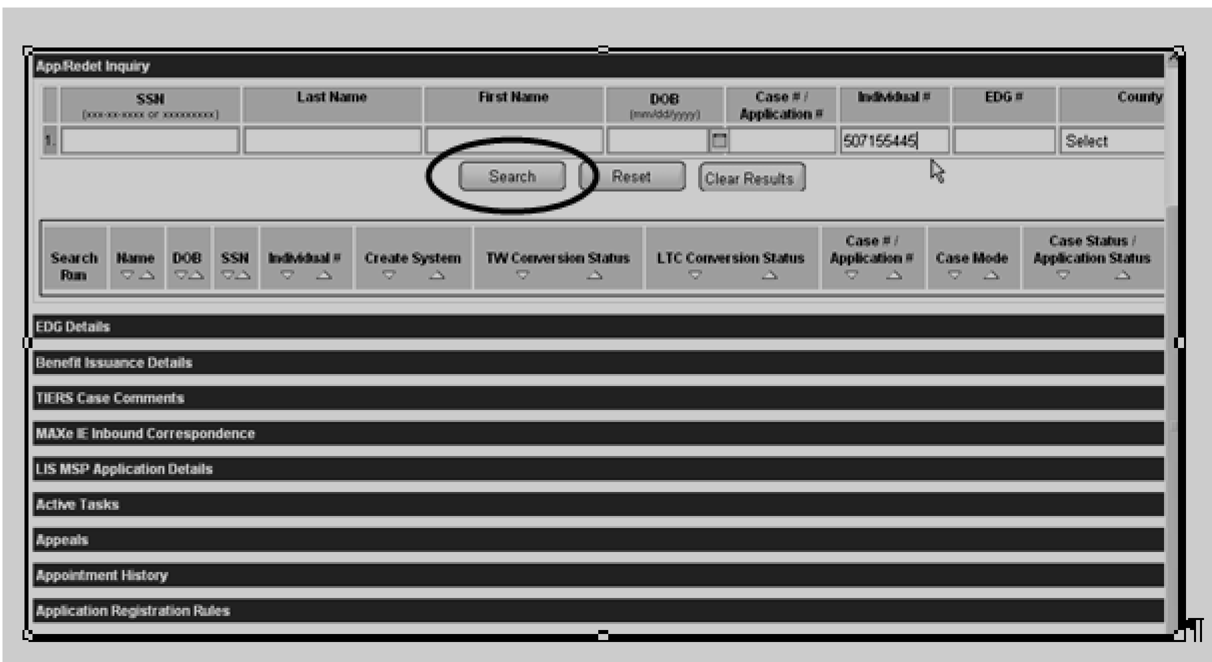
1. To complete an inquiry in the HHSC Benefits Portal, click *PT Inquiry* tab.

2. Select *Application/Redet* subsection.

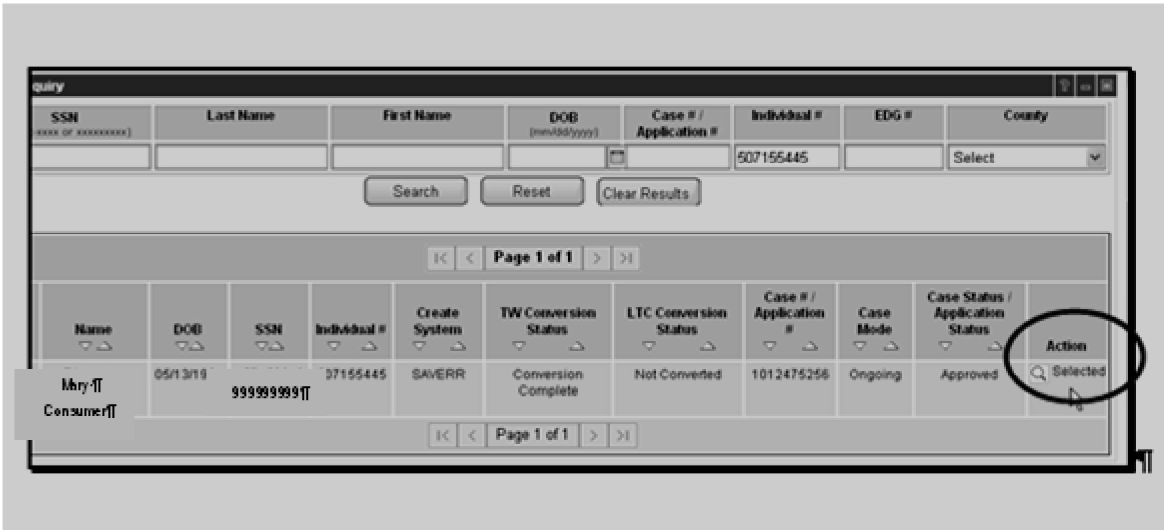
3. Complete the search using as many of the following search criteria fields as possible. This will limit the search results.

- Social Security Number (SSN)
- Last Name
- First Name
- Date of Birth (DOB)
- Case/Application Number
- Individual Number (DADS Consumer/Medicaid Number)
- Eligibility Determination Group (EDG) Number
- County

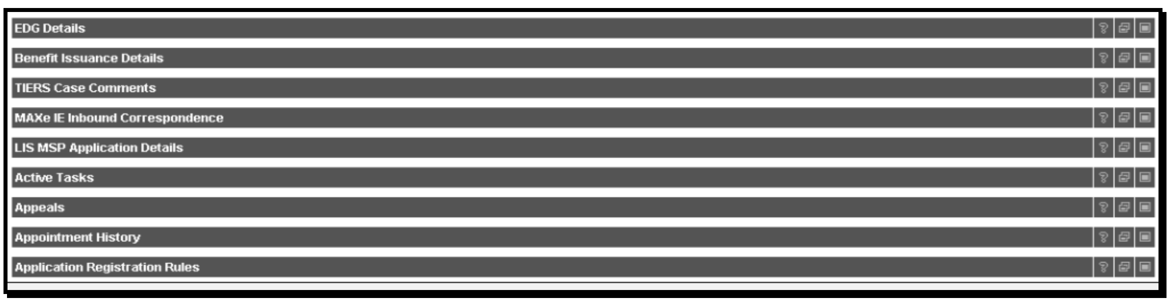
4. After entering your consumer information, click *Search* to retrieve the information.



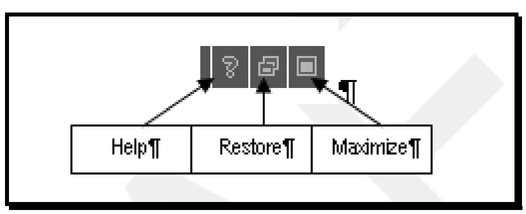
5. Review your search results. Under the action tab, click select if the individual pulled is the individual you were searching for. The line will turn green and the action will change to “*Selected*.”



You should see the following options:

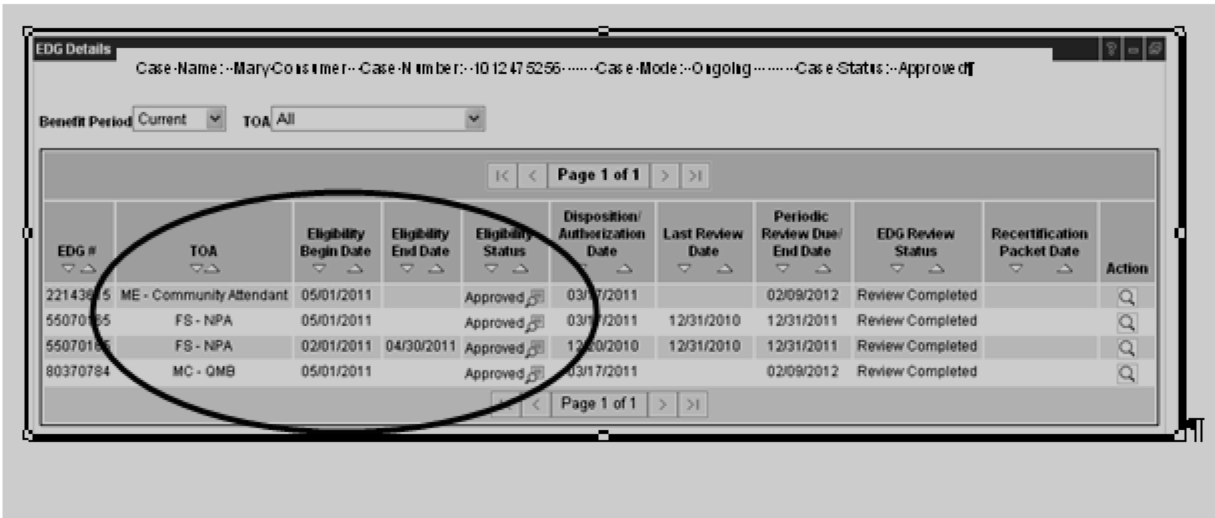


At the end of each row, you will see the options for viewing the particular item:

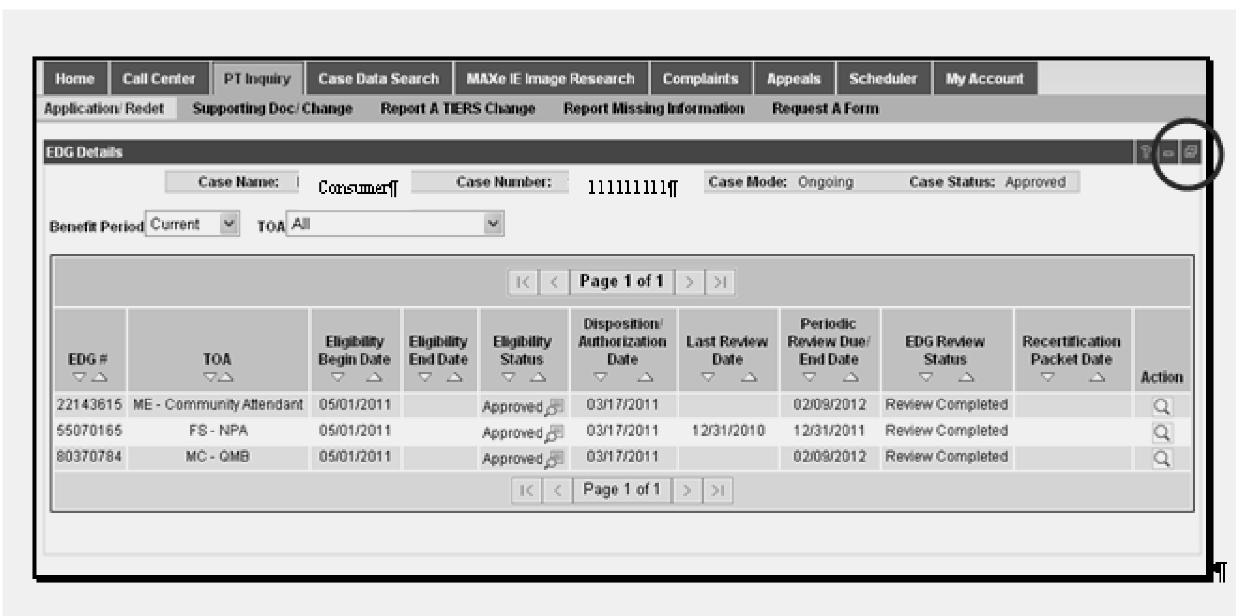


6. On the EDG Details line, click on the *Maximize* option. You will see the EDG(s) that belongs to your applicant/consumer. In the example below, the applicant/consumer is a part of Supplemental Nutrition Assistance Program (SNAP) shown as FS-NPA, ME-Community Attendant Services (CAS) Program and Qualified Medicare Beneficiaries (QMB) Program EDGs.

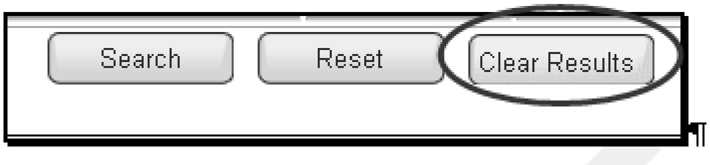
Look at the *Eligibility Begin Dates.* Notice there are no *Eligibility End Dates* and for each program, the *Eligibility Status* is "Approved," which indicates all three programs remain open.



7. When you have finished reviewing the information, click on the restore button at the end of the line to close the item.



8. To clear the search and results, click on *Clear Results*.



Reviewing Case Assignment in the Portal

Identifying the MEPD specialist working on one of your applications is an important function. There are a couple of ways to do this in the Portal.

It is important to note that this process works better when you are looking for an assigned application. Since MEPD receives their assignments through the portal, you should be able to find the assignment there.

On a converted case that has had no case action taken since being converted to TIERS, you might not find any information on MEPD assignment, as there has been no tasks for them to complete.

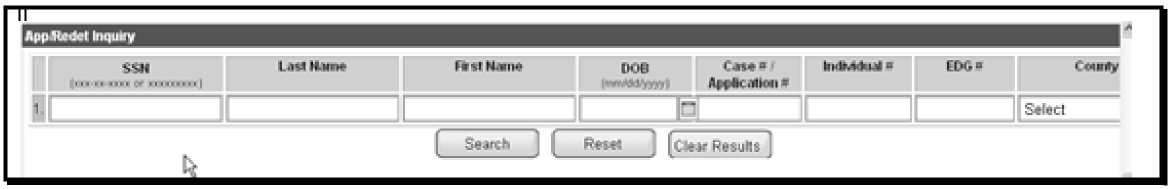
To find case assignment in the Portal, you will begin by completing an inquiry as demonstrated earlier.

1. To complete an inquiry in the HHSC Benefits Portal, click *PT Inquiry* tab.

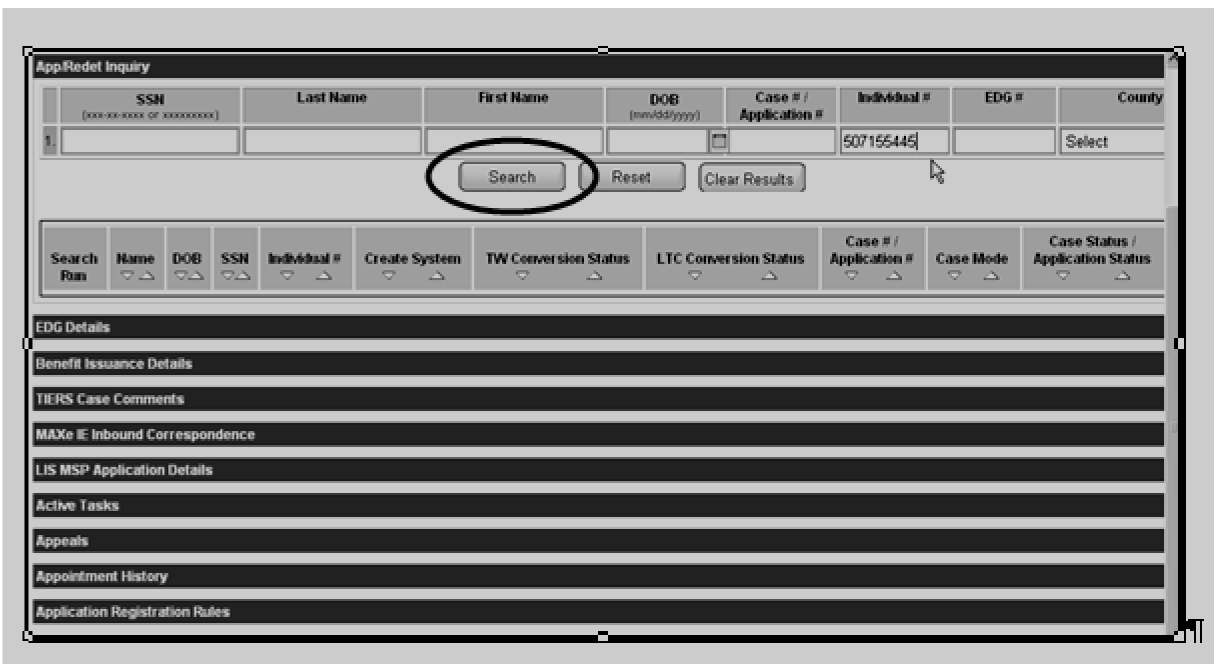
2. Select *Application/Redet* subsection.

3. Complete the search using as many of the following search criteria fields as possible. This will limit the search results.

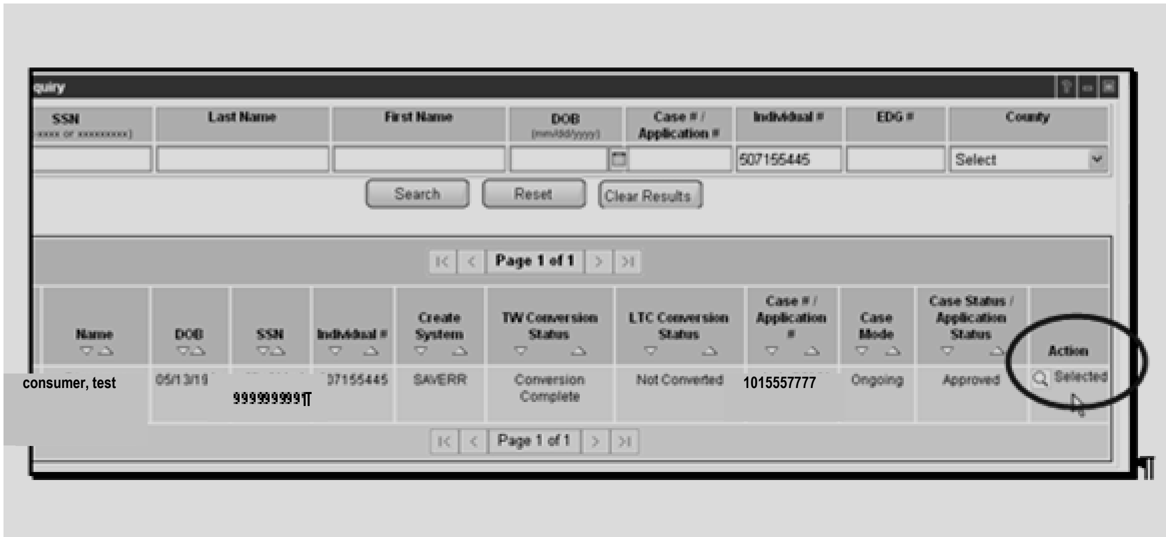
- Social Security Number (SSN)
- Last Name
- First Name
- Date of Birth (DOB)
- Case/Application Number
- Individual Number (DADS Consumer/Medicaid Number)
- EDG Number
- County



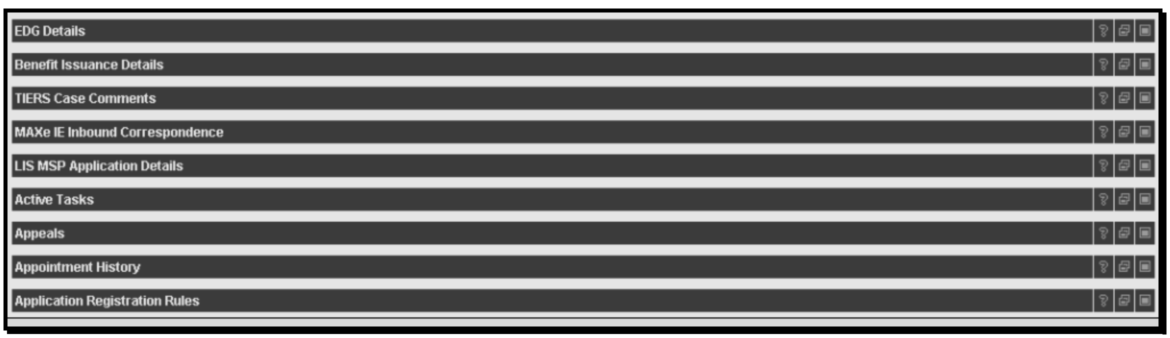
4. After entering your consumer information, click *Search* to retrieve the information.



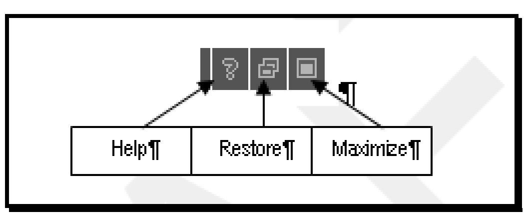
5. Review your search results and under the action tab, click select if the individual pulled is the individual you were searching for. The line will turn green and the action will change to "*Selected*."



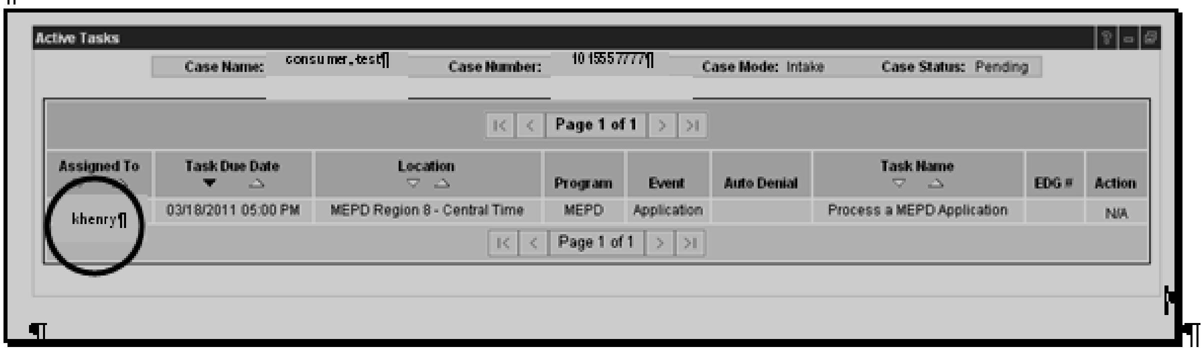
You should see the following options:



At the end of the line, you will see the options for viewing the particular item:



6. On the Active Tasks line, click on the *Maximize* option. You should see the following type of information if the application has been assigned. Note the person who received the assignment. Checking Outlook should provide you with more information on the employee's location.



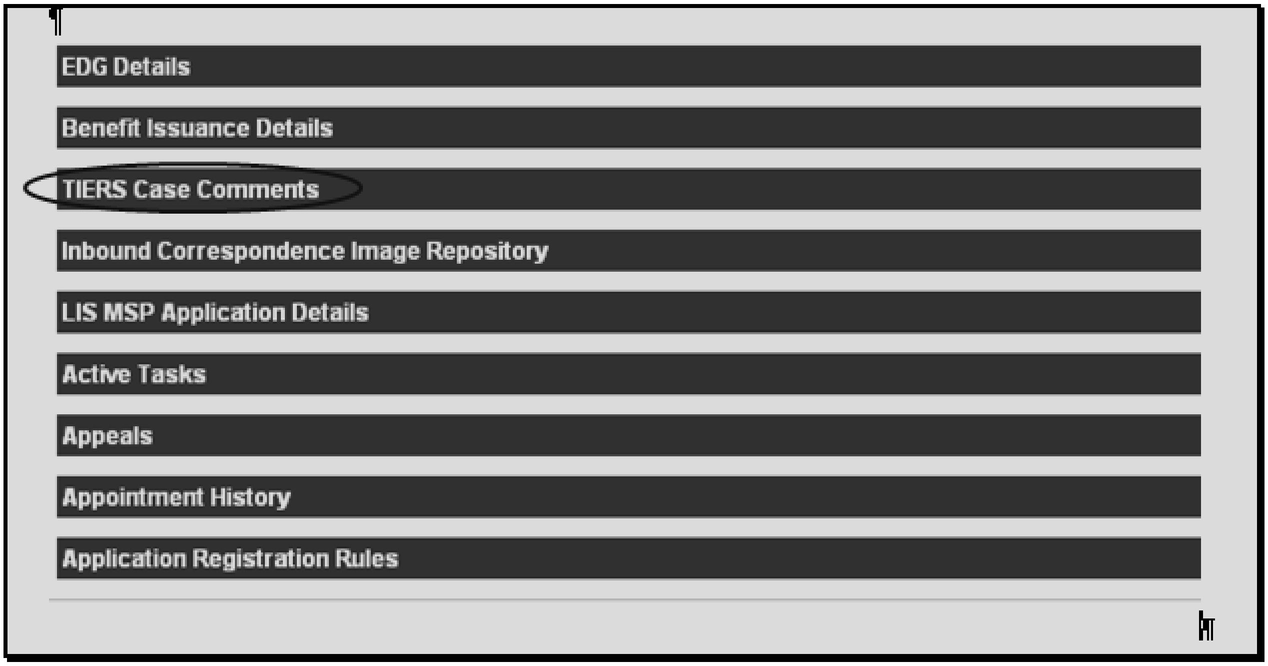
7. When you are finished reviewing the information, click on the restore button at the end of the line to close the item.

8. To clear the search and results, click on *Clear Results*.

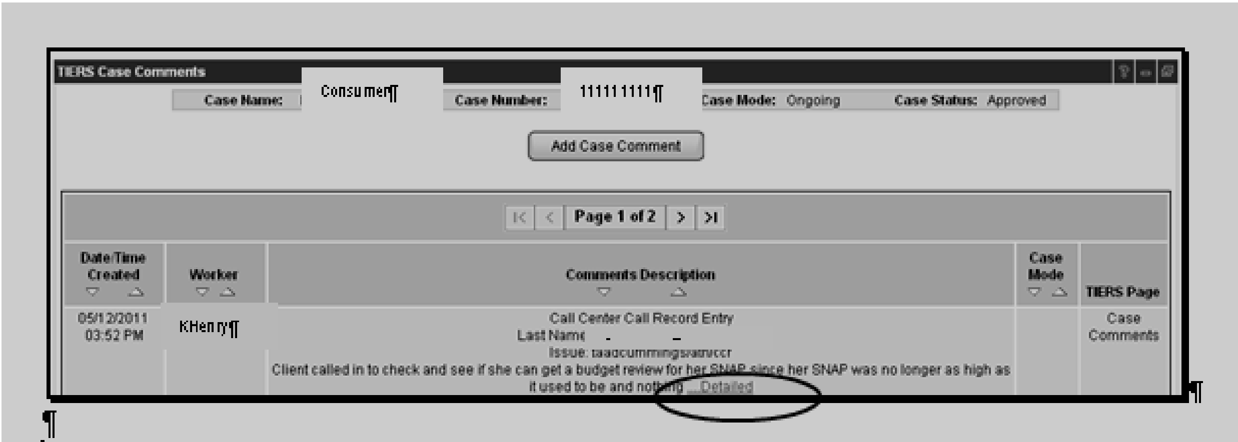
Reviewing TIERS Case Comments in the Portal

There are times when reviewing the case comments will be helpful to you. The comments might reveal to you the status of an application (e.g., awaiting resource information). In addition, case comments are helpful for identifying who is working on the case. At the beginning of the line, you will see the MEPD specialist identified. To view case comments you will need the application, case number or consumer number.

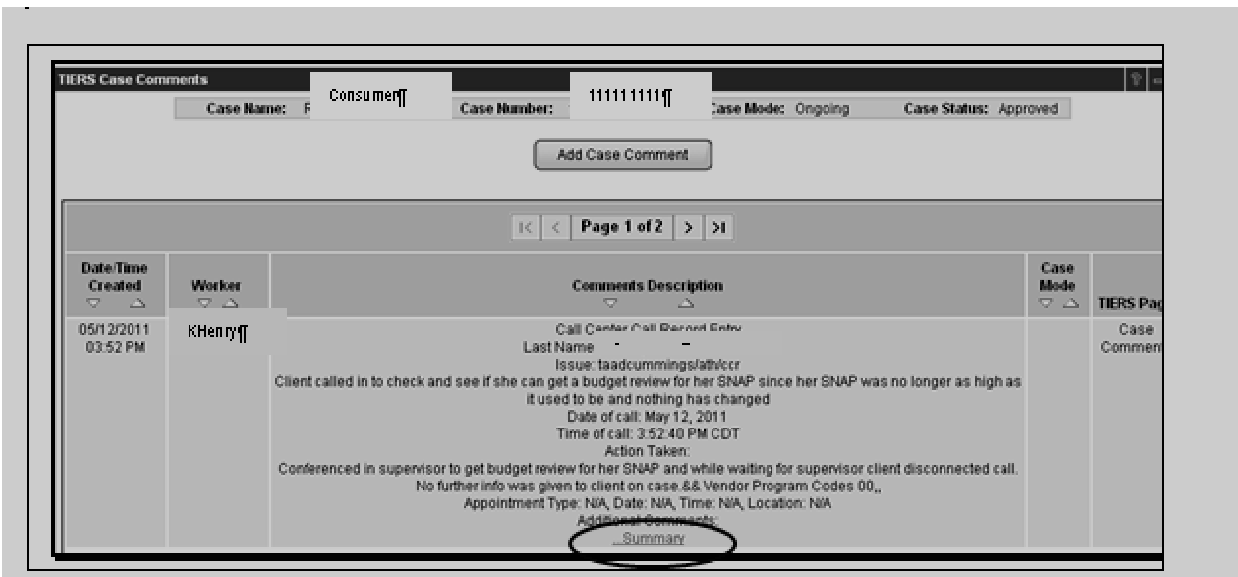
1. To view case comments, complete an inquiry, select your consumer and click on *Maximize* at the end of the TIERS Case Comments line.



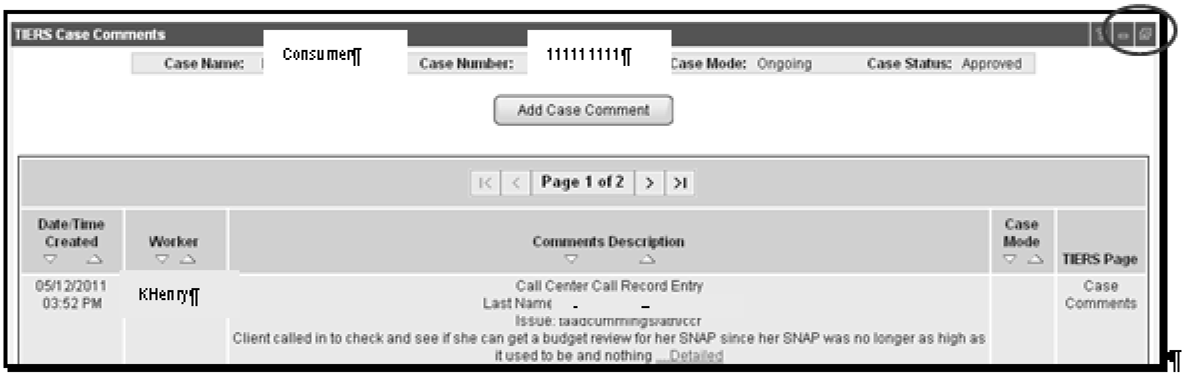
2. You will see all the comments that are related to all the EDGs in the case. Note the worker name in the second column. To read the entire entry, click on the *Detailed* link.



3. When you are finished reviewing the details, click on the *Summary* link.



4. Click on the *Restore* icon to close the comments.



Completing Inquiries Using TIERS

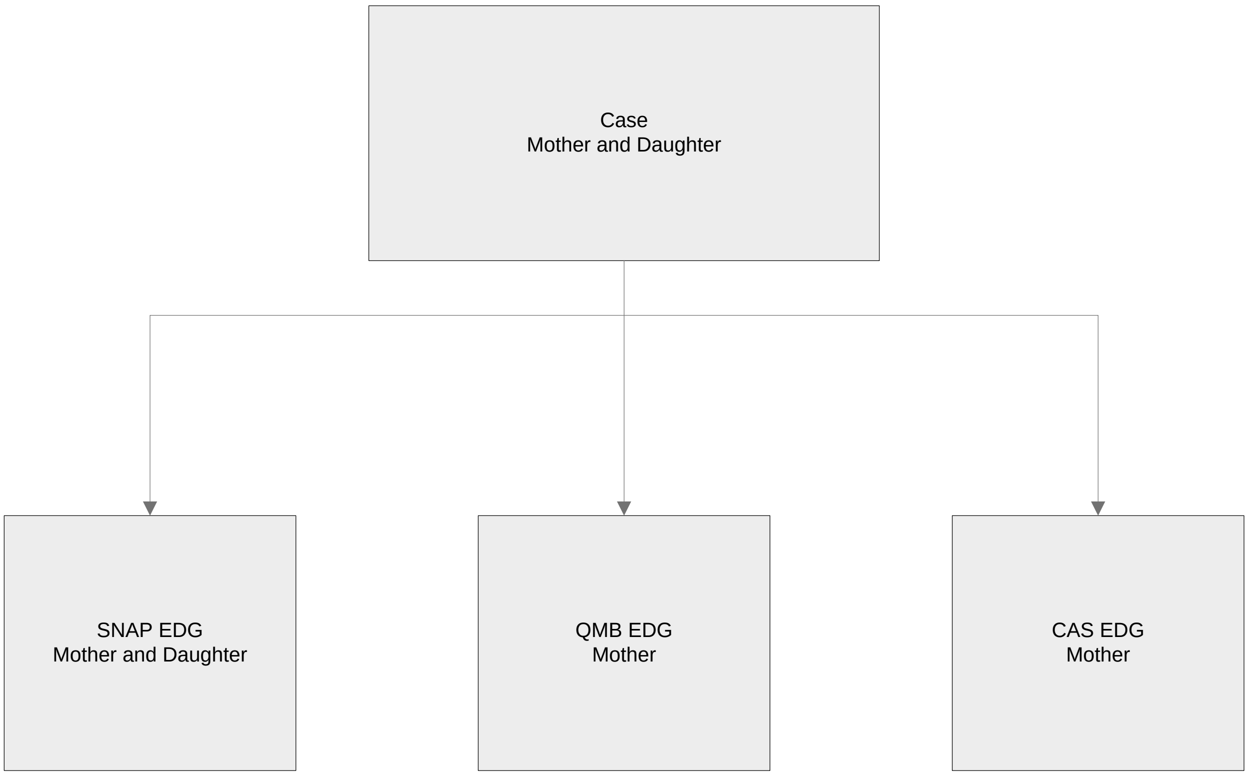
TIERS is a computer system used by HHSC staff. TIERS stores consumer and case information, determines eligibility for multiple programs based on data provided through direct data entry, interfaces with other systems, generates benefits and creates correspondence and reports.

TIERS is a real-time, online system that HHSC can use to provide benefits for Medicaid, Medicare Savings Programs, Supplemental Nutrition Assistance Program (SNAP) and Temporary Assistance to Needy Families (TANF).

Some *Terms to Remember* as you proceed through the TIERS portion of this desk guide are:

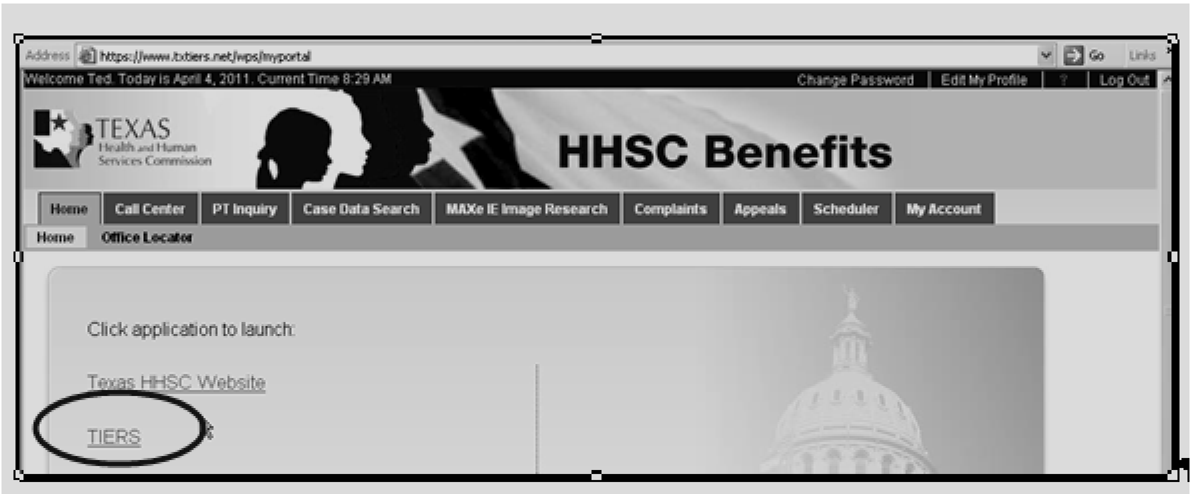
Term	Definition
Case	A case consists of all individuals who live together in a single household. A case may include outside members who have potential impact on eligibility.
Certified Group (CG)	A certified group is a group of individuals that are actually receiving a benefit.
Eligibility Determination Group (EDG)	The group of individuals used in the budgeting process.

It is important to note that one case can contain one or more EDGs. For example: A CAS consumer lives with her daughter who works part-time. The household receives SNAP benefits in addition to the CAS consumer receiving her attendant services and QMB. The case includes three EDGs – one for CAS, one for QMB and one for SNAP.



Logging Into TIERS

1. From the HHSC Benefits Portal Welcome Page, select *TIERS*.



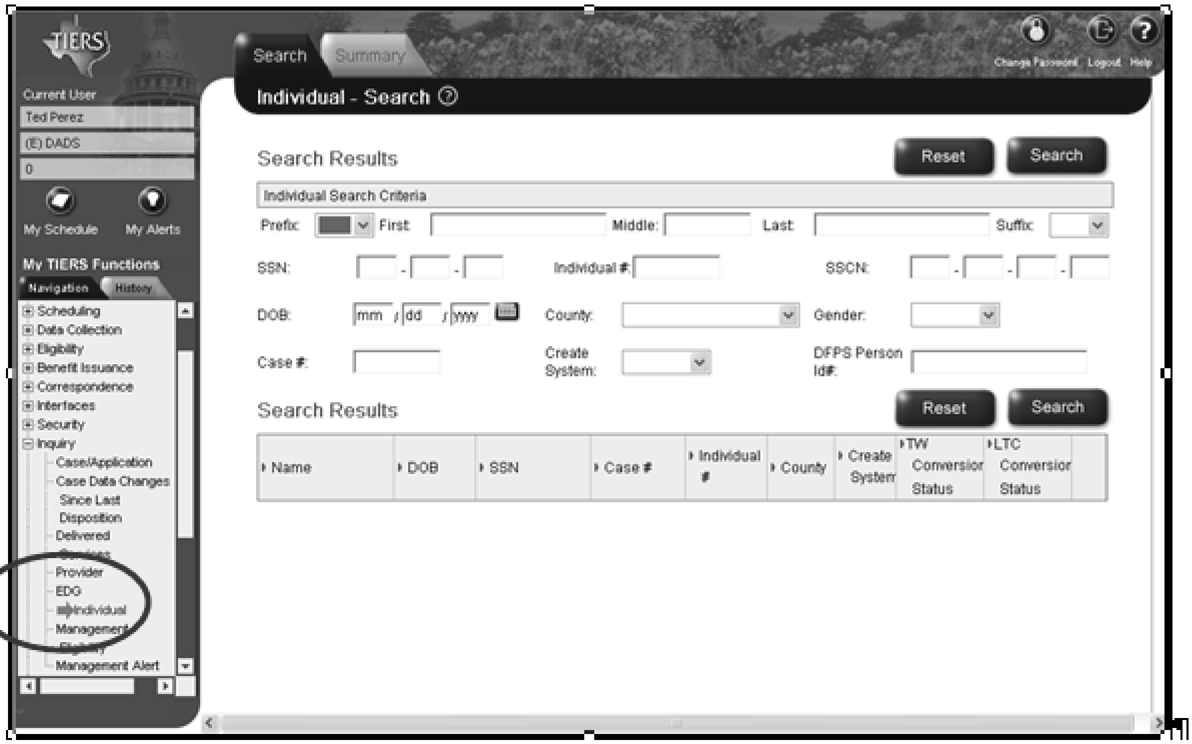
2. You will see the TIERS Welcome Page.

Timing Out of TIERS

For security reasons, TIERS times out after 30 minutes of inactivity.

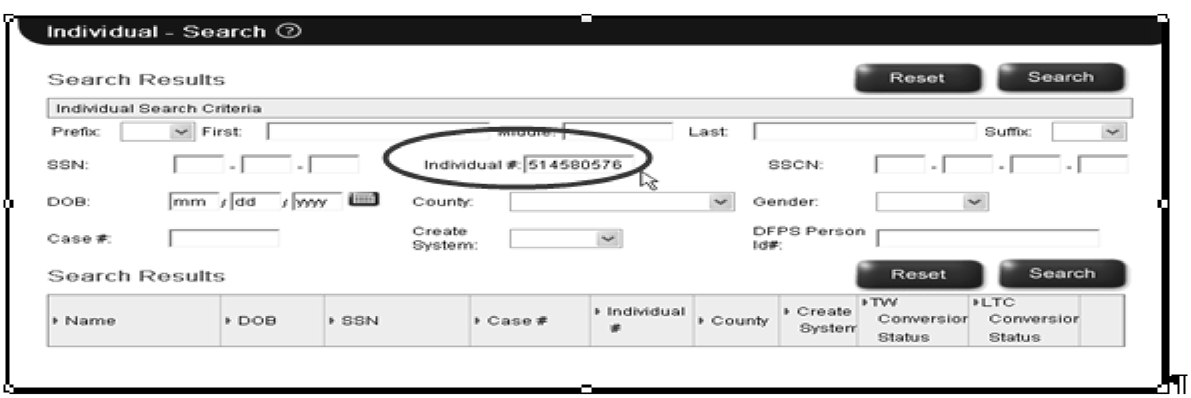
<u>Completing Inquiry in TIERS - Individual</u>

1. Under *My TIERS Functions* in the Left Navigation Bar, click the *Navigation* tab. Under the *Inquiry* section of the Left Navigation Bar, click *Individual.* You will see the *Individual – Search* window.

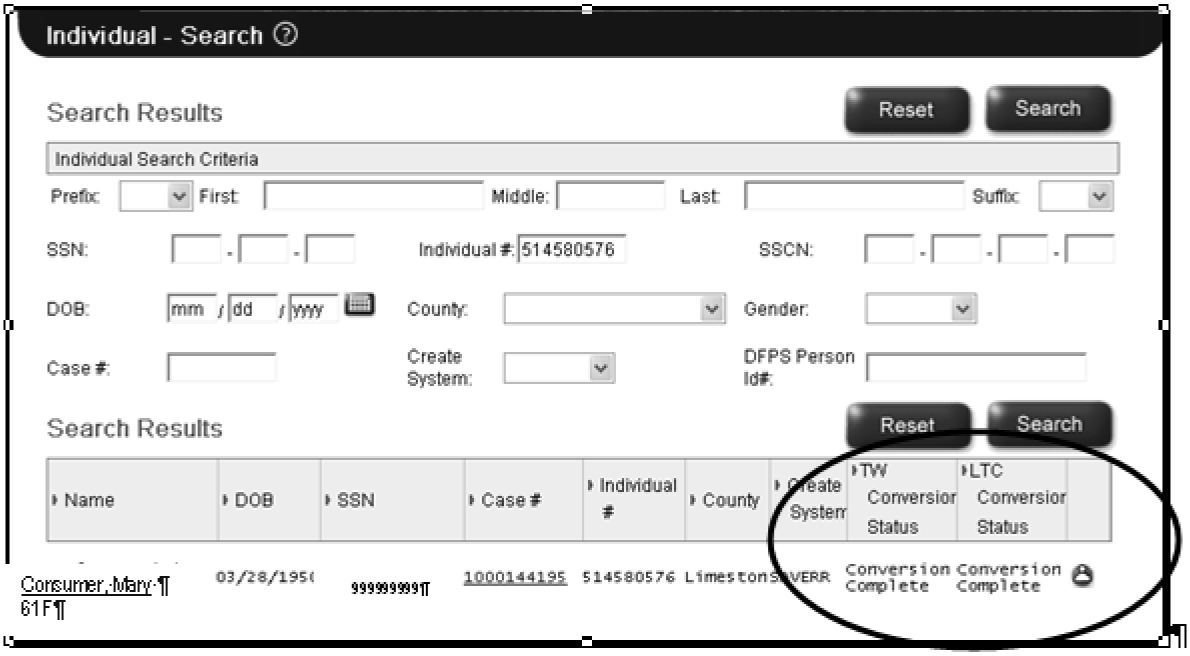


2. Enter your search criteria in the appropriate field. In this example, the *Individual #* field is used. (Note: The Individual number is the same as the DADS consumer ID number or the Medicaid recipient number.)

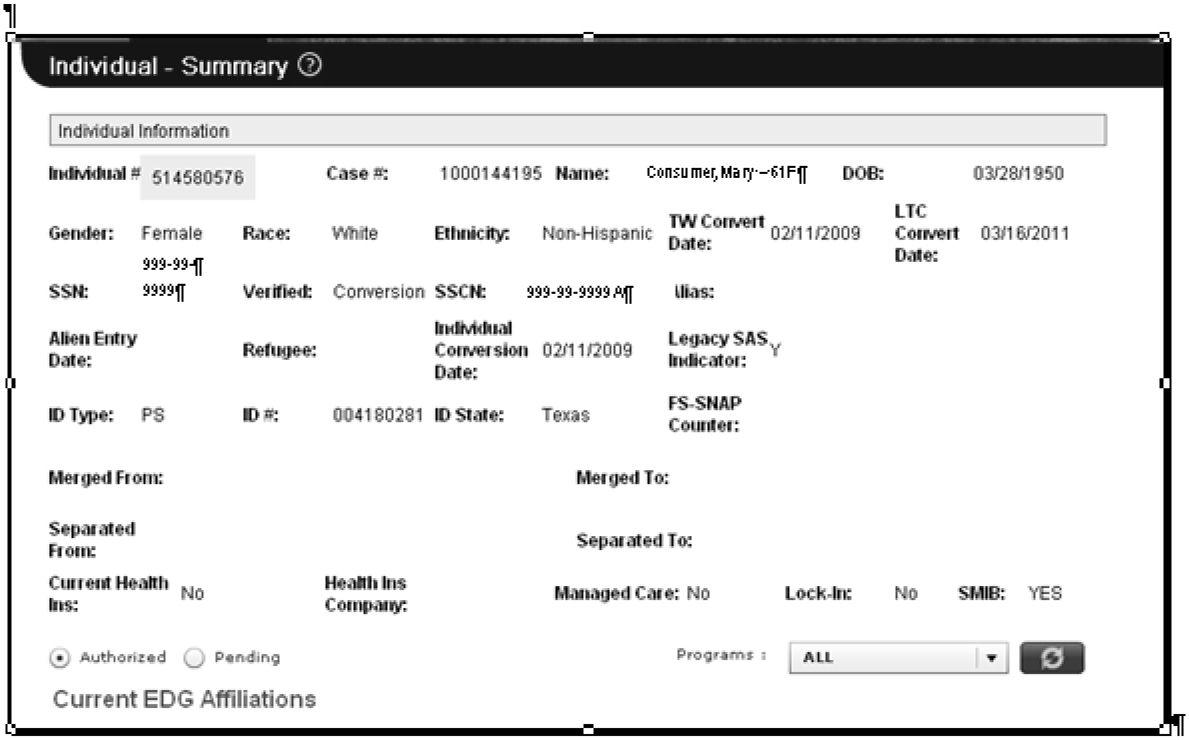
There may be times in which you only have a name and Social Security Number. You will use the information you have available to conduct your search.



3. The results of your search will appear. Note the Texas Works and LTC Conversion Status on this line. The status “conversion complete” indicates the case has been converted to TIERS.



4. If you click on the consumer name hyperlink, you will be taken to the *Individual – Summary* window. From this search, you can find the *Case #*, the identifying information for the consumer, the *LTC Convert Date* (from SAVERR to TIERS), the *SMIB* (Medicare) indicator and whether the consumer is enrolled in *Managed Care*.



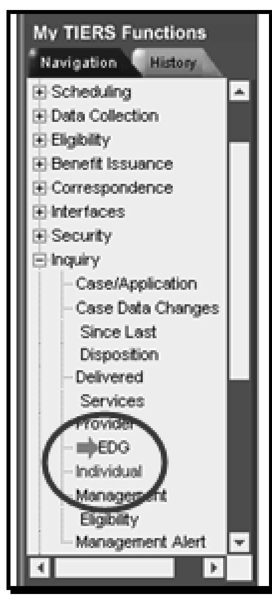
5. If you wish to look at a specific program EDG, you can do so from the *Current EDG Affiliations* window. Click on the EDG hyperlink to be taken to that particular EDG.

Current EDG Affiliations

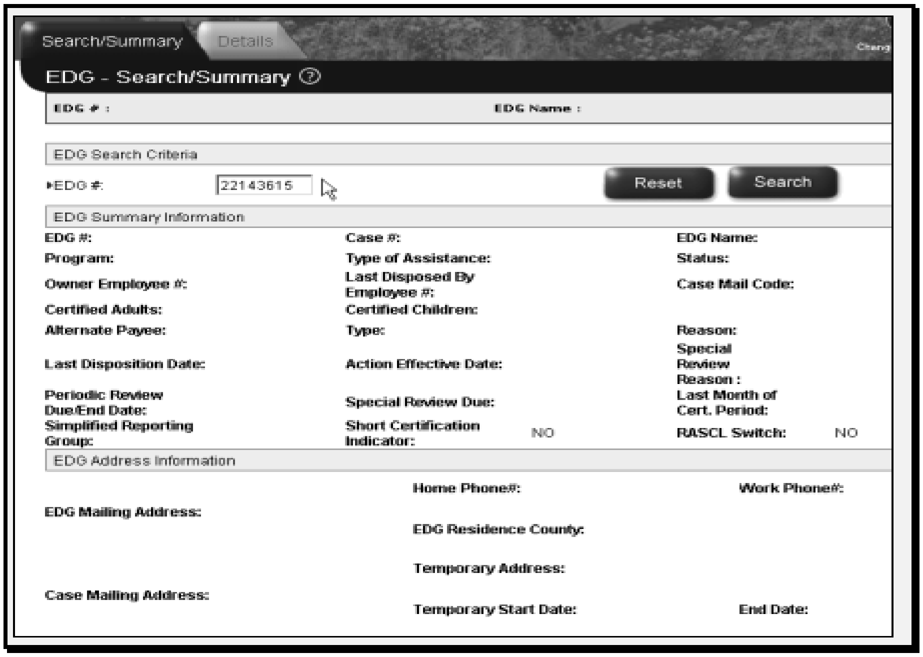
Type of Assistance	EDG #	EDG Status	Participation Status	Participation Status Begin Date	Participation Status End Date	Case #	Conversion Status	Conversion Date
ME - Community Attendant	22143615	Approved	Eligible Adult	05/01/2011		1000144195	Conversion Complete	03/16/2011
MC - QMB	80370784	Approved	Eligible Adult	05/01/2011		1000144195	Conversion Complete	03/16/2011

Completing Inquiry in TIERS - EDG

1. Under *My TIERS Functions* in the Left Navigation Bar, click the *Navigation* tab. Under the *Inquiry* section of the Left Navigation Bar, click *EDG.* You will see the *EDG – Search* window. If you use this method, you will need the EDG number.



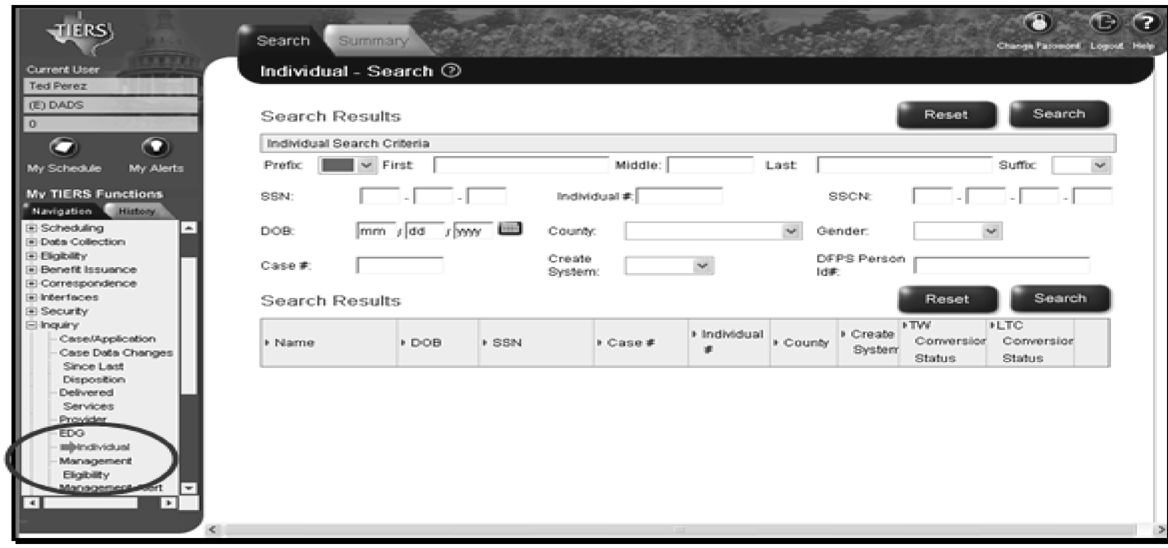
2. You will see the *EDG – Search/Summary*. Enter the EDG number to view the EDG.



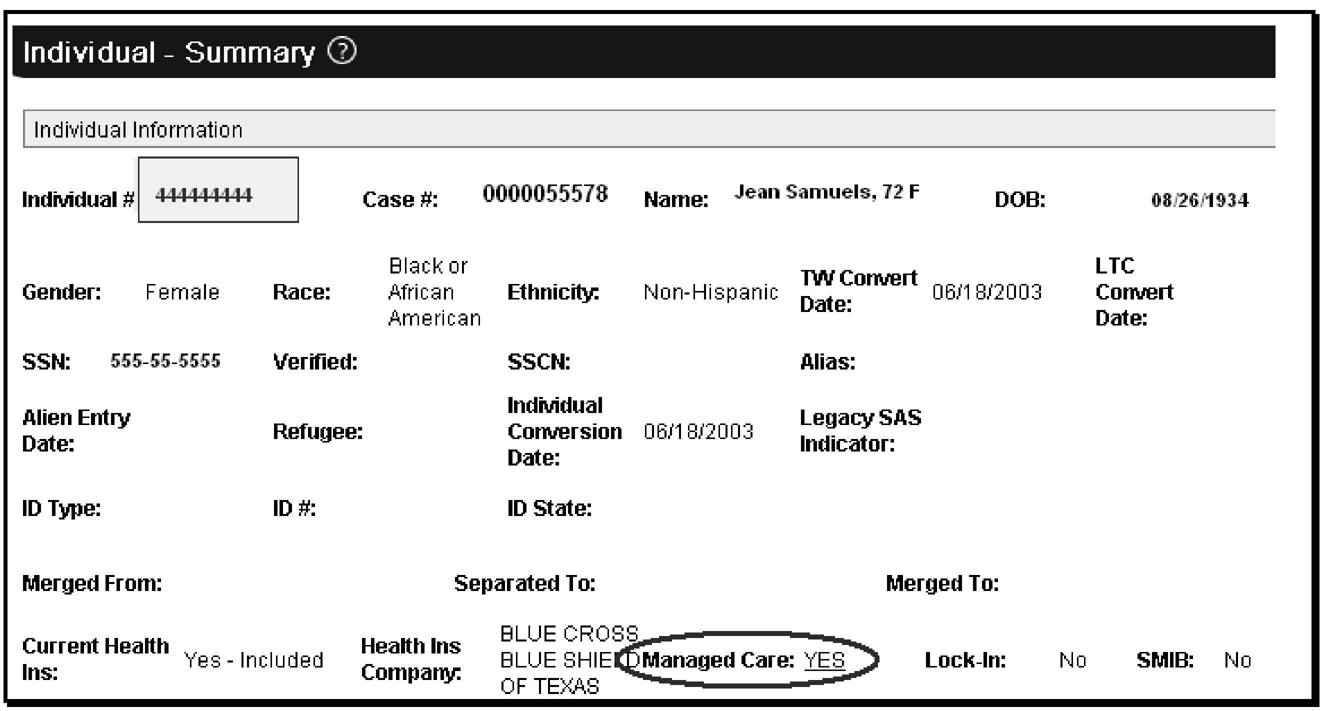
3. You will then see the *EDG – Search/Summary* results. This window shows you the actual *Case Number*, the *Program* and *Type of Assistance*, the *Last Disposition Date* and *Due Date for the next Periodic Review*, the *Owner Employee #,* the *EDG Mailing Address* and *Home Phone.*

Locating Managed Care Information in TIERS

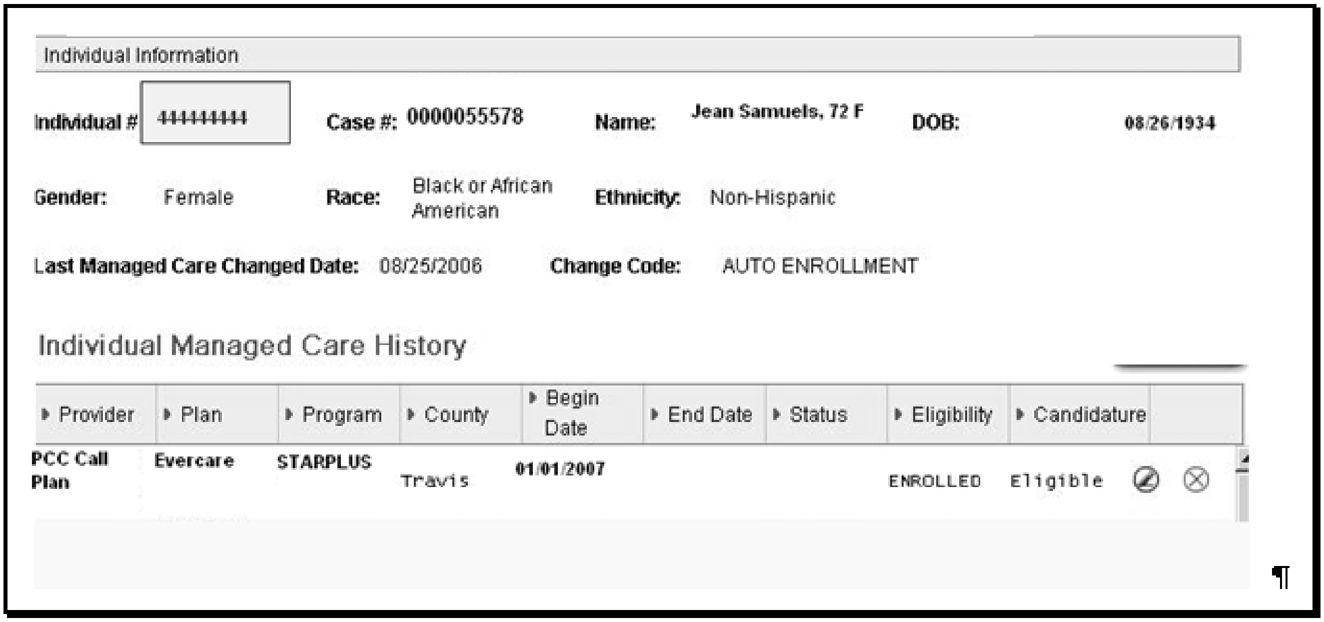
1. Under *My TIERS Functions* in the Left Navigation Bar, click the *Navigation* tab. Under the *Inquiry* section of the Left Navigation Bar, click *Individual.* You will see the *Individual – Search* window.



2. Enter the individual information and click *Search.* The *Individual – Summary information* will appear. The consumer's managed care status is shown on this window in the *Managed Care* section.



3. Clicking on the *Yes* hyperlink takes you to the managed care details:

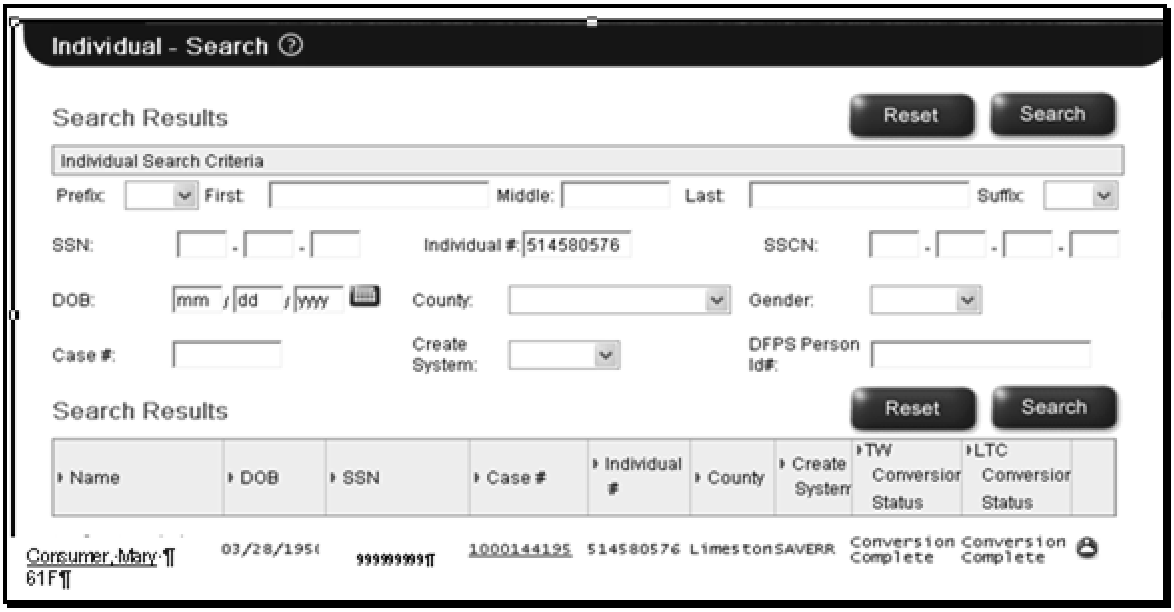


Using Hover Functionality – Another Method to Find Information

There is another method that will give you information that you need to determine if your applicant or consumer has Medicaid coverage. This method will also provide you with Medicaid history.

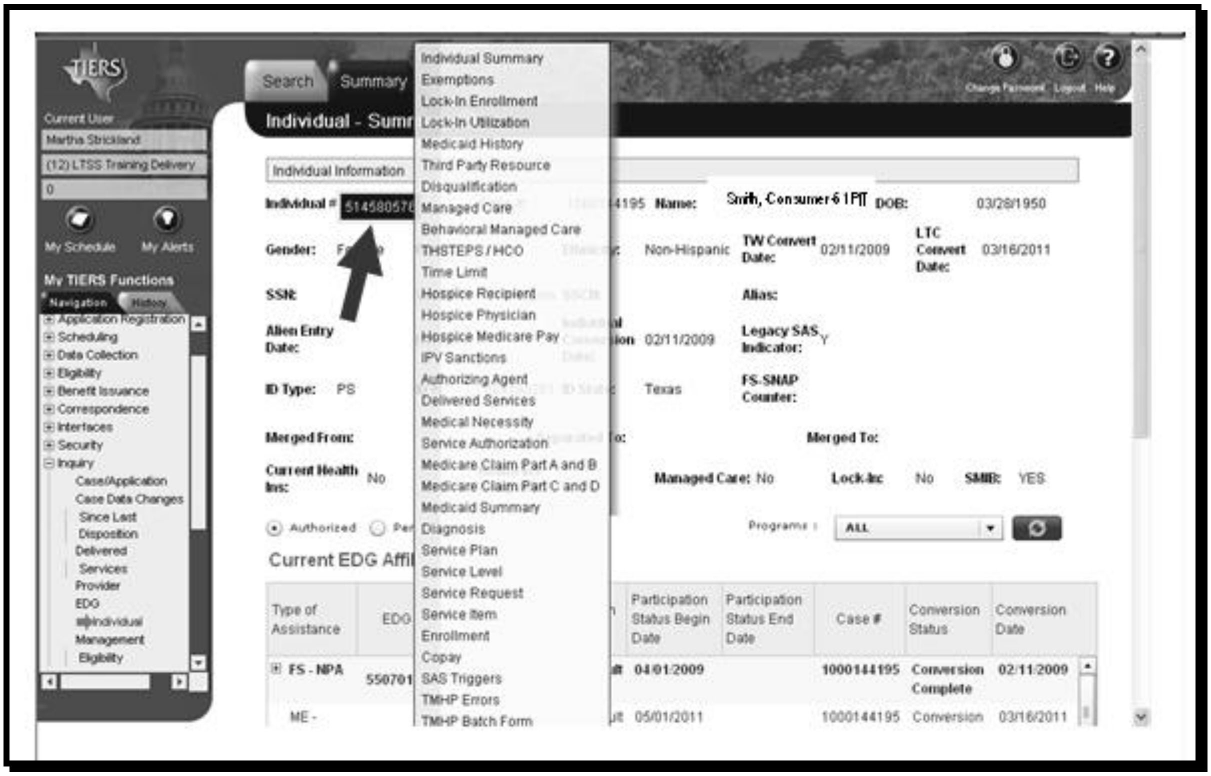
1. Click on Inquiry – Individual from the left navigation bar.

2. Conduct the inquiry using the consumer number or other identifying information.



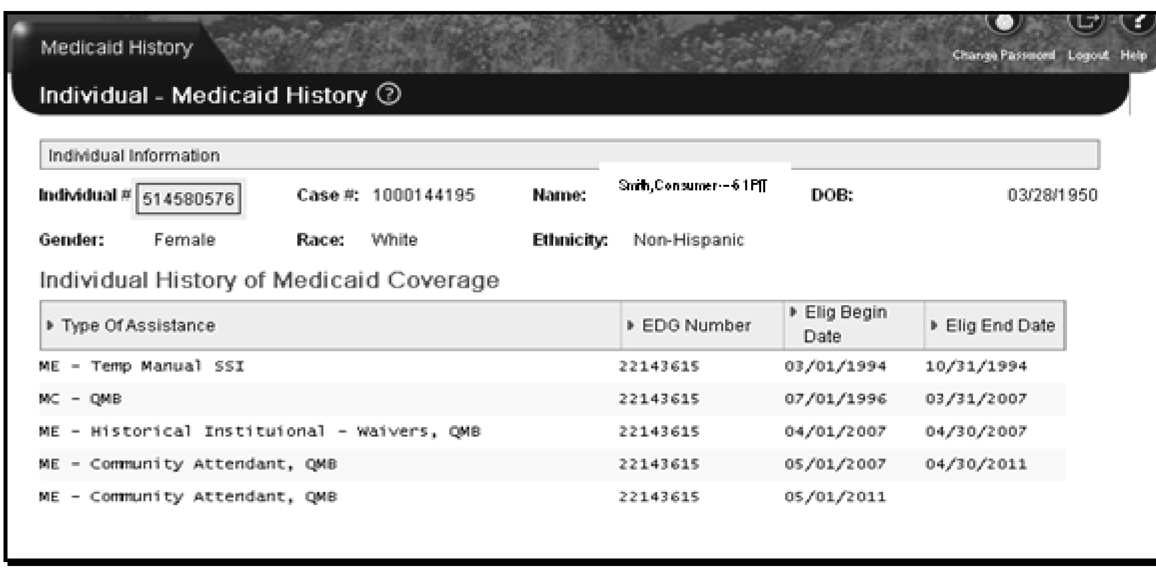
3. Click on the name hyperlink to see the individual summary.

4. This is where you will find the "hover menu." Hover over the individual number to see the menu. You can see how helpful this hover menu can be.

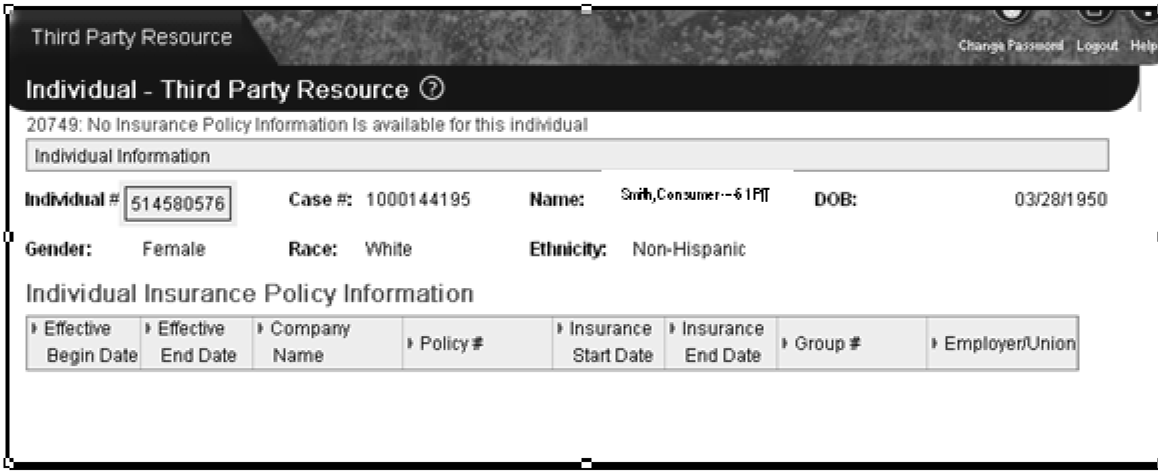


5. Examples of useful tools in this hover menu are:

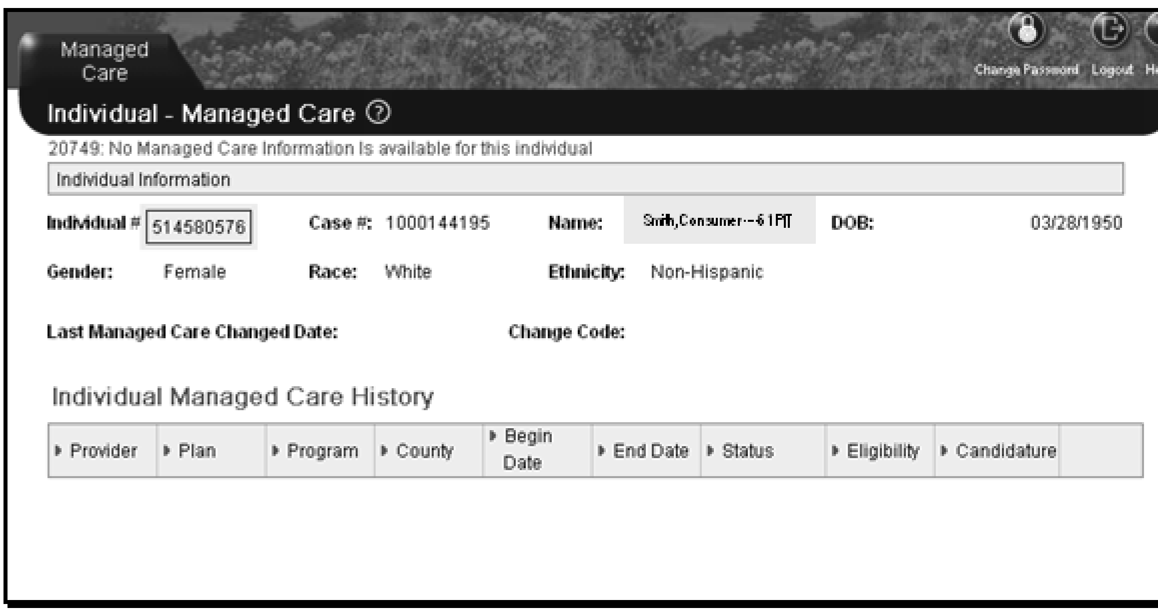
- Medicaid History – This field provides information on current eligibility. It would also be very useful for a Claims Management System (CMS) Coordinator to determine if Medicaid eligibility is present for a period of time.



- Third Party Resource – This field describes any private health insurance held by the consumer.



- Managed Care can also be viewed from this menu.

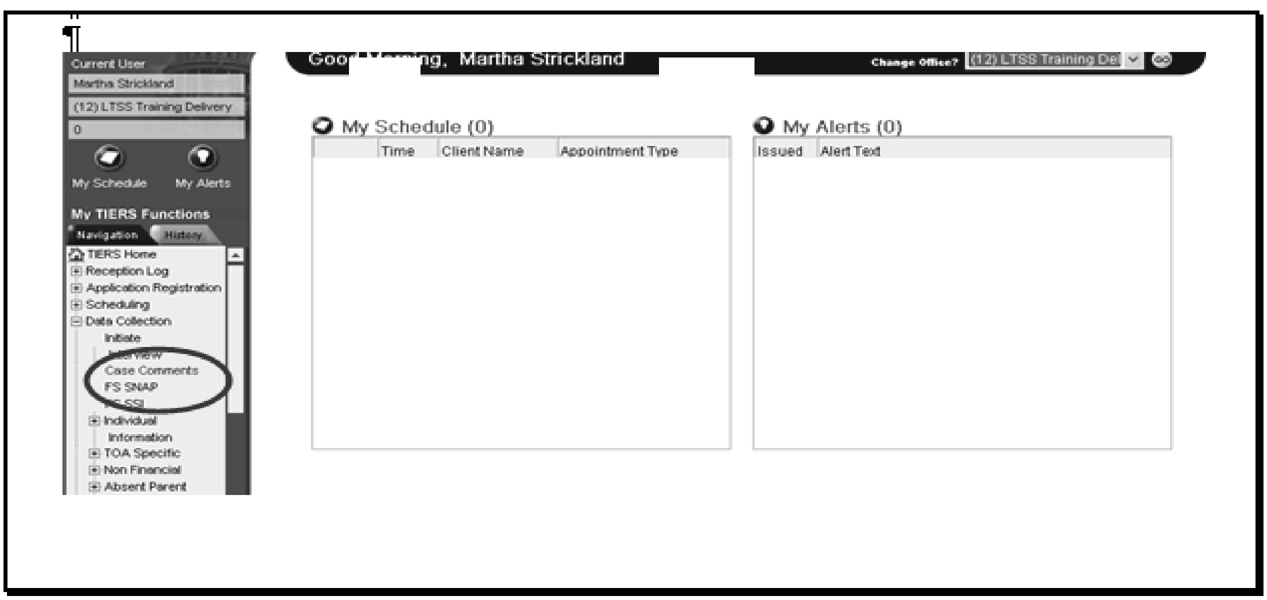


- Hospice Information can be viewed from this menu. Since the individual number does not display in this field, click on the person icon to return to the Individual Summary window.

Reviewing Case Comments in TIERS

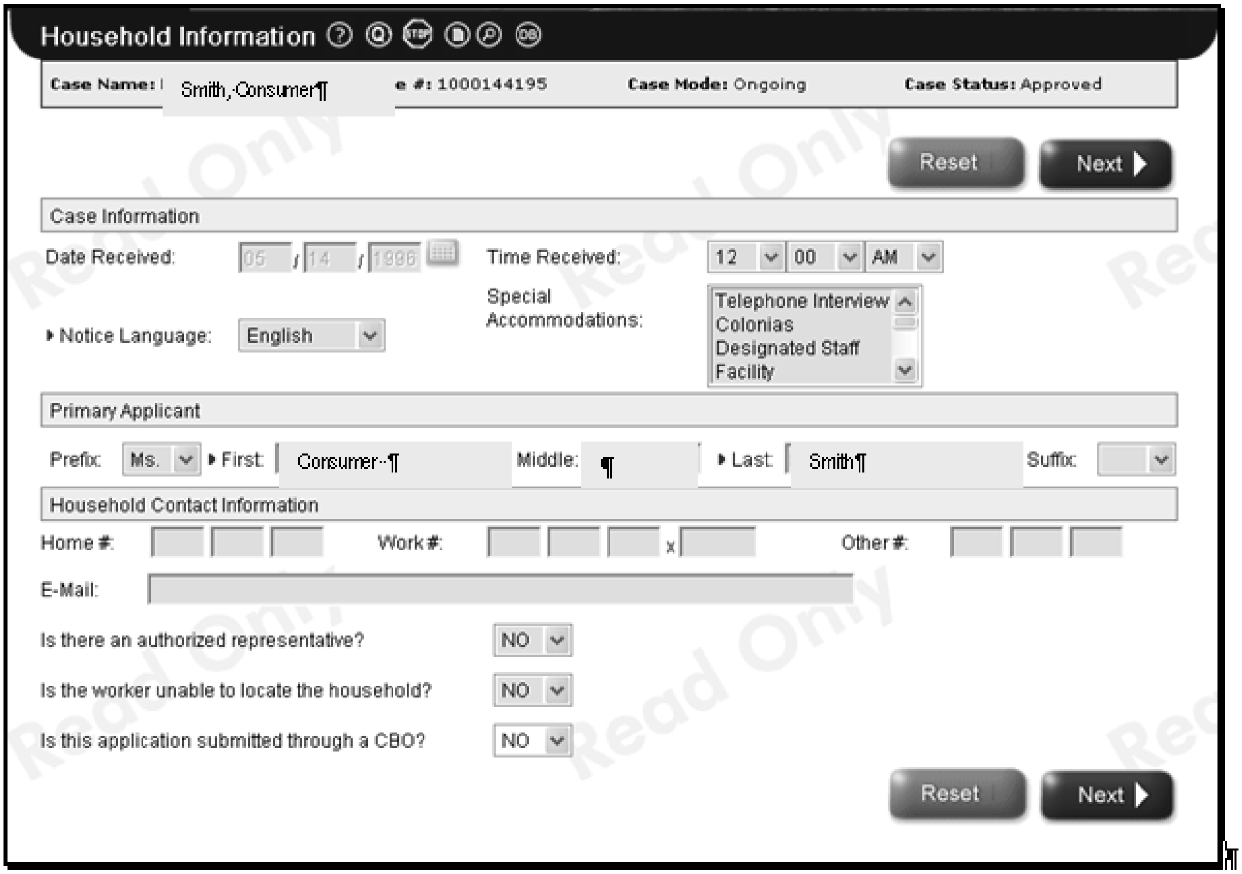
There are times when reviewing the case comments will be helpful to you. The comments might reveal to you the status of an application (e.g., awaiting resource information). In addition, case comments are helpful for identifying who is working on the case. At the beginning of the line, you will see the MEPD specialist identified. To view case comments you will need the application or case number:

1. From TIERS Home page, click on *Data Collection* and *Case Comments* in the left navigation bar.

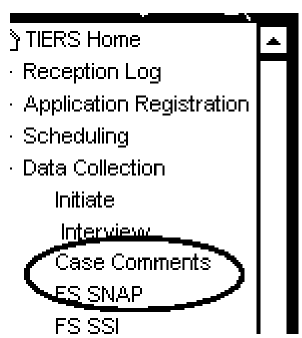


2. You will be taken to the Initiate Interview window. Click the “ongoing” *Interview Mode.* Enter the application or case number you are wishing to view, and click the *Next* button.

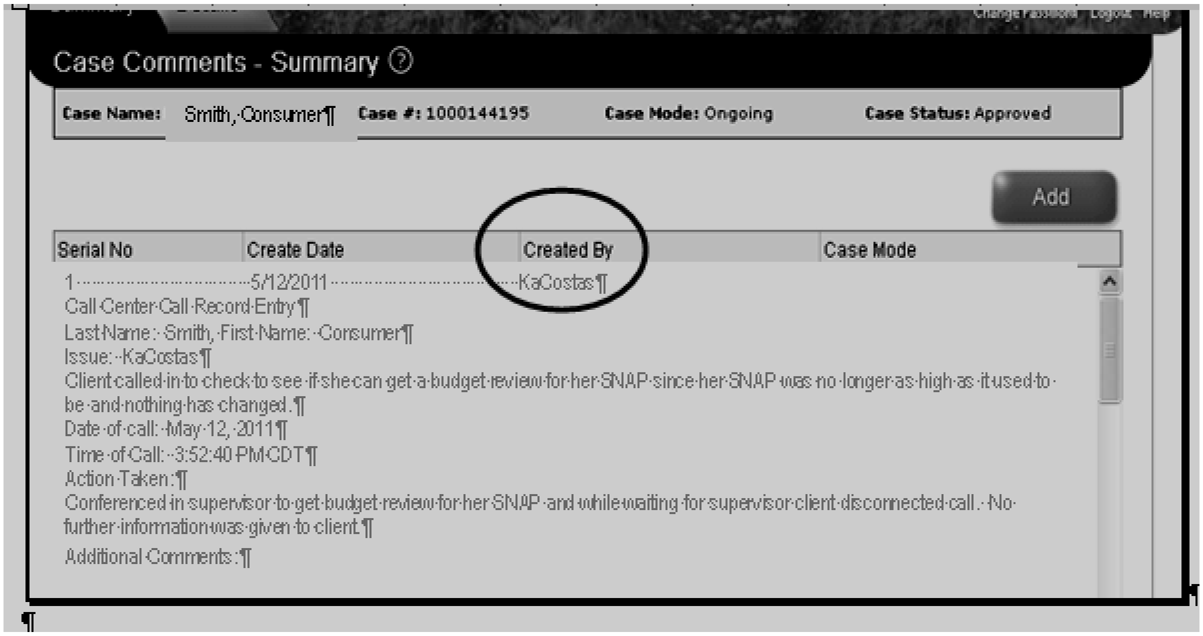
3. You will be taken to the *Read Only* household information page.



4. From the left navigation bar, click on case comments again.



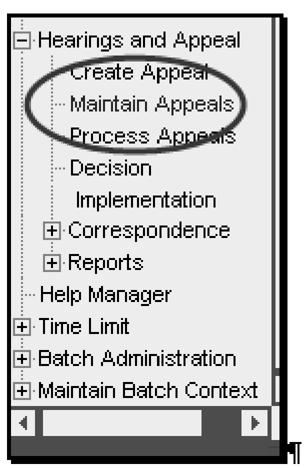
4. View Case Comments. Note the section – Created by. This will give you the name of the person who created the comments. This could be the MEPD specialist. The Outlook address book is a great tool for finding contact information for the employee.



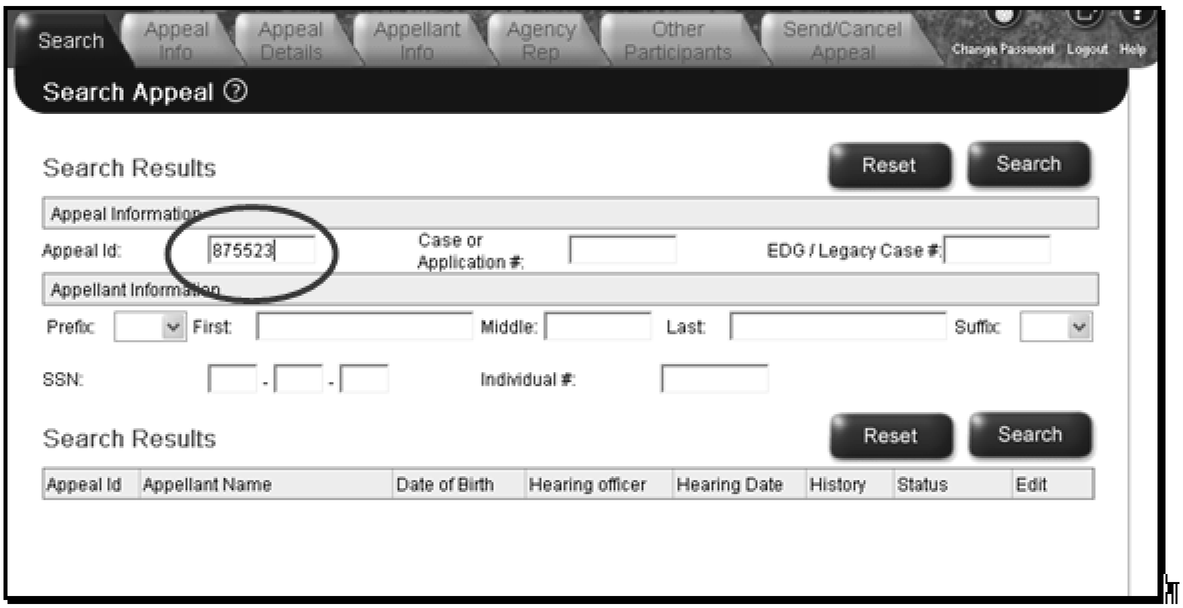
Reviewing Hearings and Appeal Information in TIERS

There may be times that you need to check the status of an appeal in TIERS.

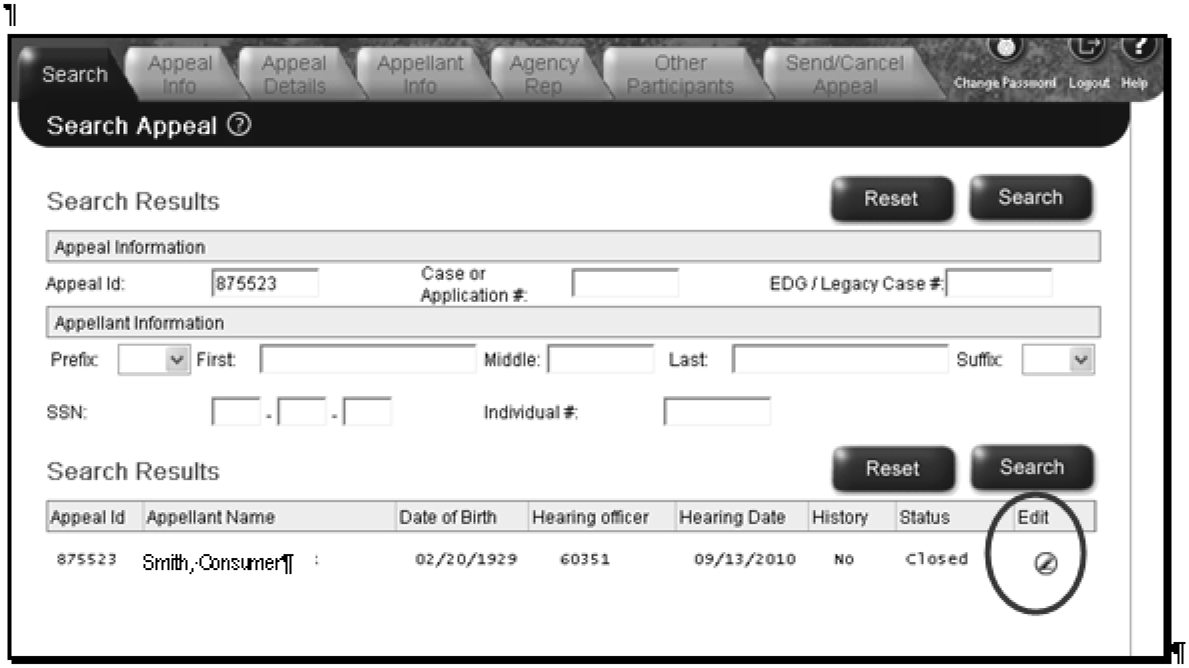
1. From the TIERS Home Page, go to the left navigation bar and open *Hearings and Appeal.* Click on *Maintain Appeals*.



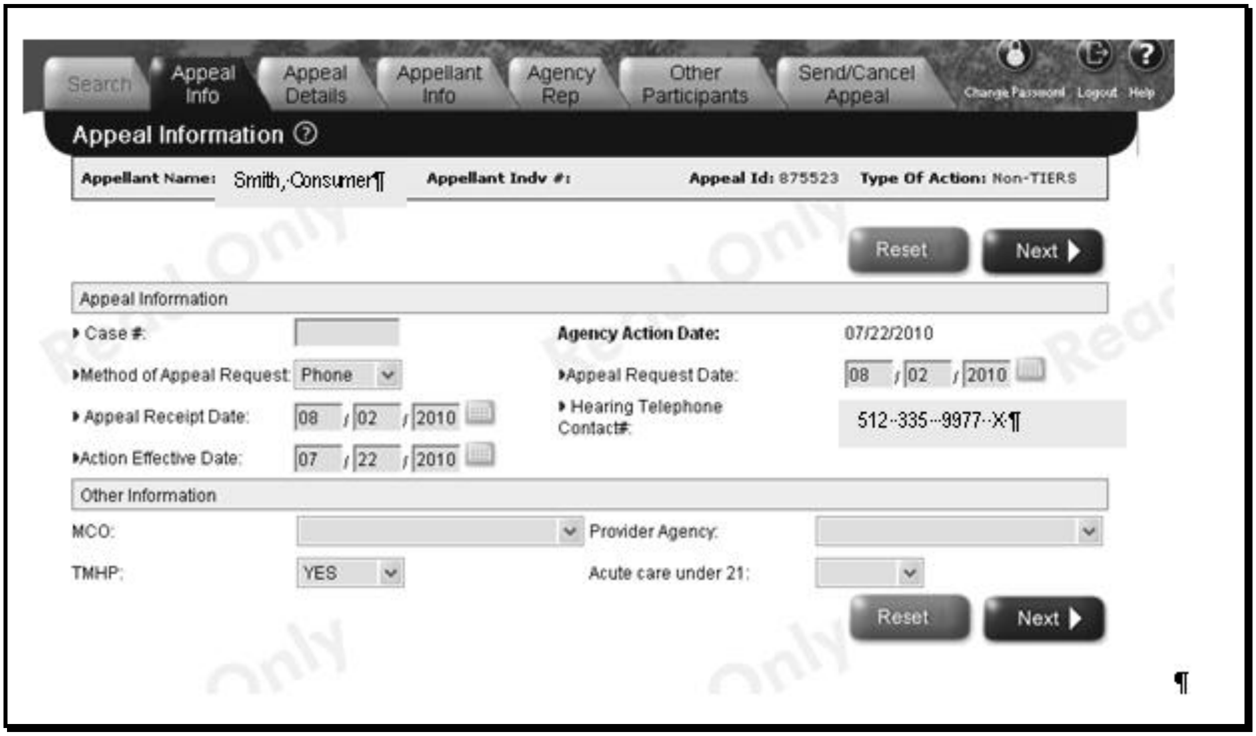
2. Enter the Appeal ID and click *search*.



3. The individual's name will appear as well as the current status of his appeal. If you need more information, clicking on the *Edit button* will open the record in *Read Only* mode.



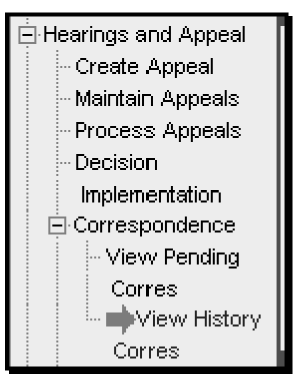
4. After clicking the edit icon, you will be taken to the first tab: Appeal Information.



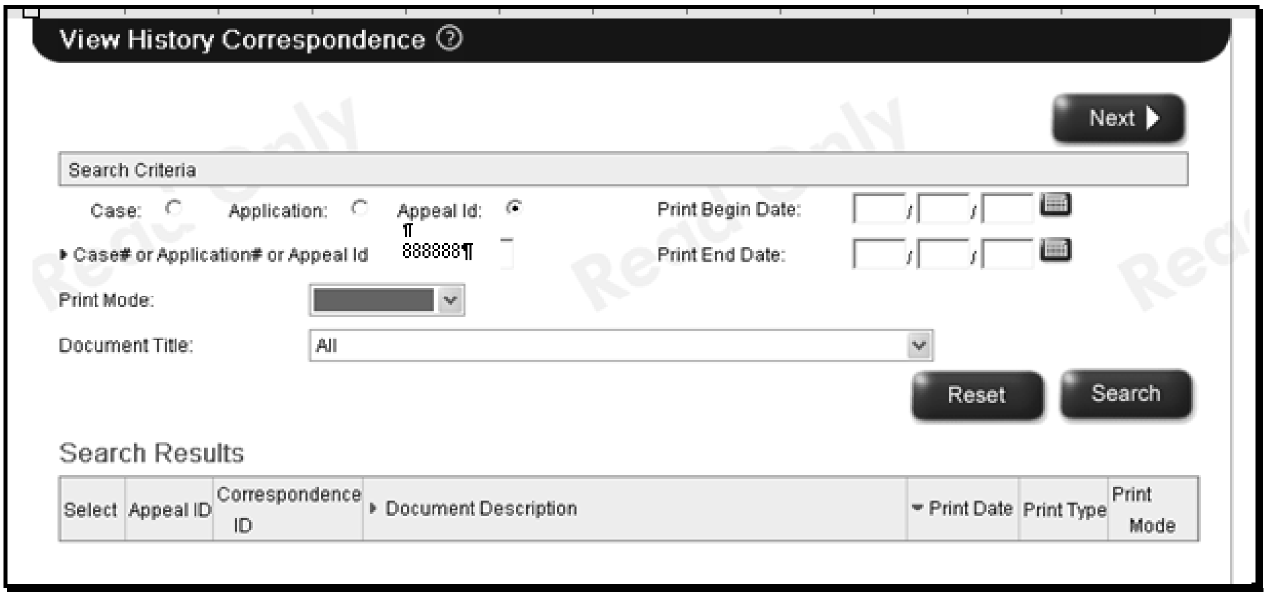
5. Clicking the *Next* button will take you to the other *Read Only* topics shown on the tabs at the top of the window.

<u>Reviewing Hearings Correspondence</u>

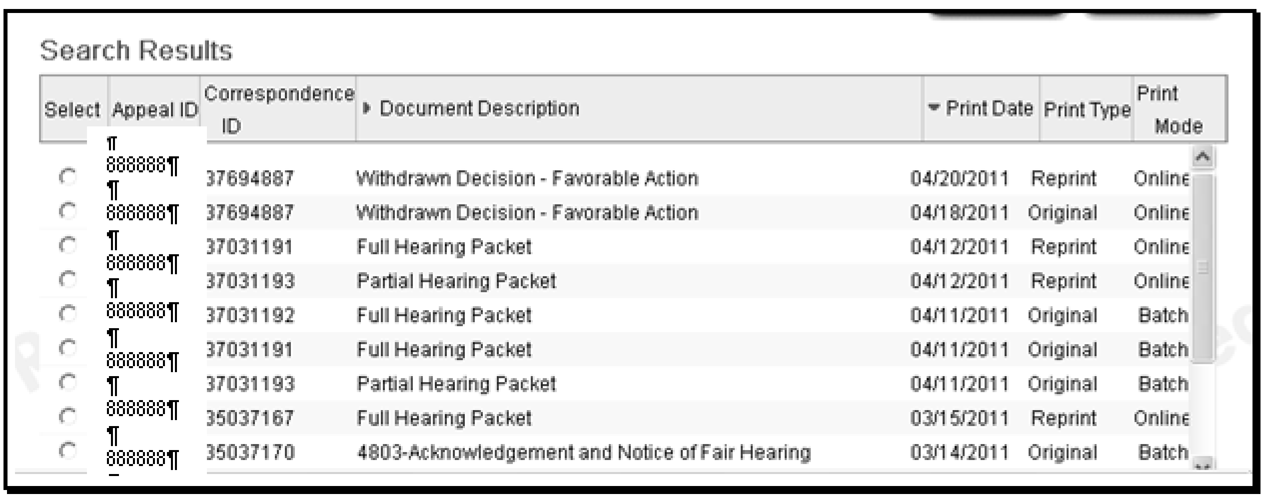
1. From the left navigation bar, under *Hearings and Appeal*, select *Correspondence*. Depending on the status of the fair hearing, you might find correspondence under *View Pending Corres* or *View History Corres*.



2. You will need an Appeal ID number. Select the *Appeal Id* radio button, then enter the *Appeal Id* number. Remove the default dates that appear when you enter the page. Leave the *Print Mode* at the default *blank* and the *Document Title* at the default *all*. Select *Search.*



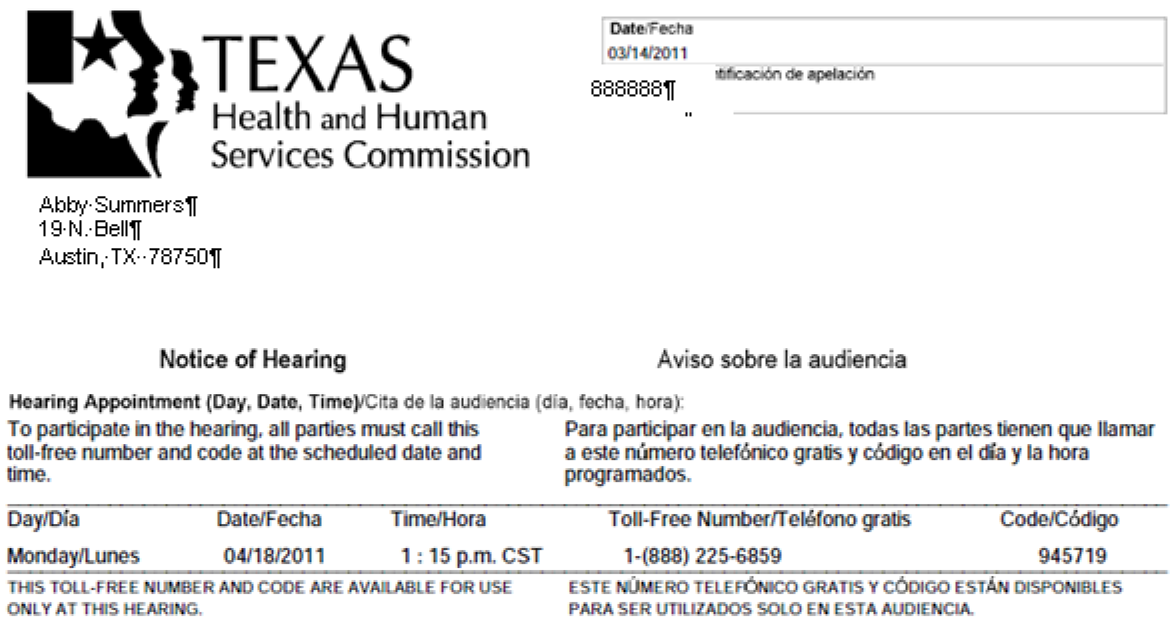
3. Your results will appear, and you can view all the associated correspondence. This inquiry process will be very helpful if you need to view the Form 4803, *Acknowledgement and Notice of Fair Hearing.*



4. To view the correspondence, select a radio button and click Next.

5. You will come to the *History Correspondence Detail* Window. Select the *radio button* of the consumer whose correspondence you wish to view. Select *Preview*.

6. A PDF version of the correspondence will open.



TEXAS Health and Human Services Commission

Date/Fecha
03/14/2011

888888¶

tificación de apelación

Abby·Summers¶
19·N.·Bell¶
Austin,·TX··78750¶

Notice of Hearing Aviso sobre la audiencia

Hearing Appointment (Day, Date, Time)/Cita de la audiencia (día, fecha, hora):

To participate in the hearing, all parties must call this toll-free number and code at the scheduled date and time.

Para participar en la audiencia, todas las partes tienen que llamar a este número telefónico gratis y código en el día y la hora programados.

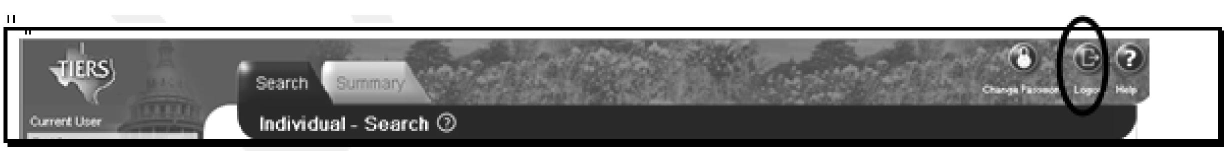
Day/Día	Date/Fecha	Time/Hora	Toll-Free Number/Teléfono gratis	Code/Código
Monday/Lunes	04/18/2011	1 : 15 p.m. CST	1-(888) 225-6859	945719

THIS TOLL-FREE NUMBER AND CODE ARE AVAILABLE FOR USE ONLY AT THIS HEARING.

ESTE NÚMERO TELEFÓNICO GRATIS Y CÓDIGO ESTÁN DISPONIBLES PARA SER UTILIZADOS SOLO EN ESTA AUDIENCIA.

Logging Out of TIERS

When you are finished with your inquiry, you will need to log out of the system. You do this by clicking on the *Logout button* at the top right hand corner. Do not just use the browser button for closure.



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