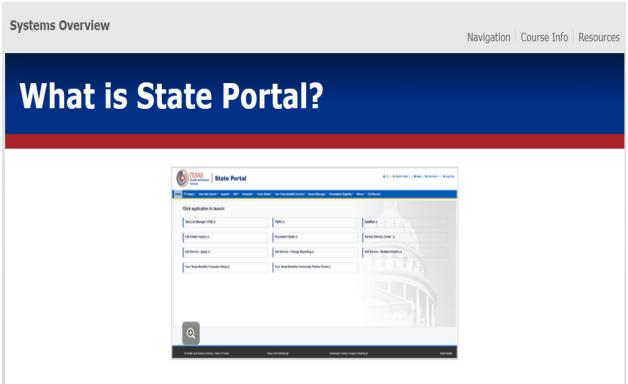
HHSC Benefits Portal Reference Guide



State Portal is a workload management tool. It acts as a single-entry point to web-based systems supporting the HHSC eligibility process. It provides access to applications, case documents and other case and client information. State Portal also provides TIERS access and important details about the tasks you work.

Lesson 1: State Portal Overview

State Portal Overview focuses on tools that you use each day on the job in State Portal. The goal is to enable you to use the system to do your job effectively, efficiently, confidently and comfortably. To do that, you should understand how best to apply the tools at your disposal.



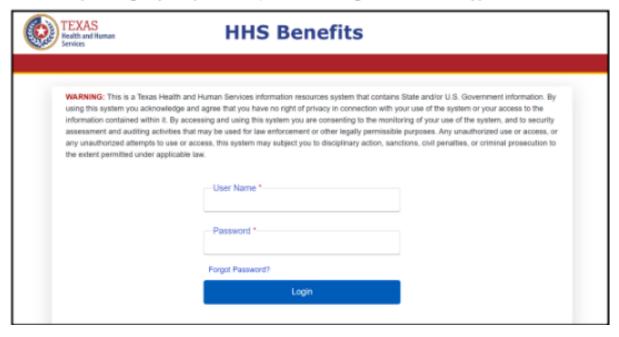
Key Terms

Term	Definition						
Budget Group	The group of individuals whose income and resources are considered in the eligibility determination process.						
Case	A case consists of individuals grouped together by their relationships and the types of assistance they receive together. These relationships and types of assistance are called EDGs. A case is composed of individuals and EDGs.						
Certified Group (CG)	The group of individuals that are eligible for and receiving a benefit on a particular type of assistance.						
Eligibility Determination Group (EDG)	Includes one or more individuals grouped together based on the programs applied for and by the relationships of its members. The EDG contains all individuals whose needs, resources, income, expenses/deductions are considered in determining the eligibility of EDG members.						
Hyperlinks	A reference from one location to another. The hyperlink is usually distinguished by a different color, font, or style from the surrounding text. When you click the hyperlink, the browser displays the target of the link.						
Image	A scanned picture of case correspondence that is accessible through the State Portal.						
Portlet	Displays information in a small section of a web page.						
State Portal	A workload management tool that provides access to case documents, forms and information. It also manages tasks that relate to TIERS cases.						
Task	An action item in the State Portal that must be completed on a case.						

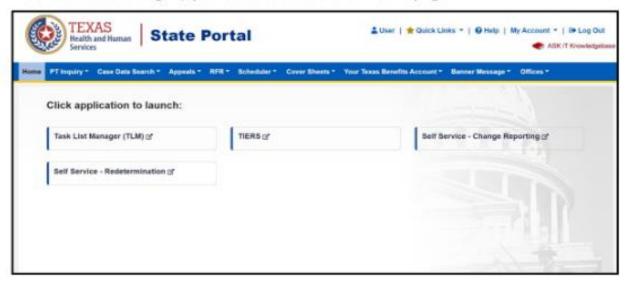
Texas Integrated Eligibility Redesign System (TIERS)	A web-based system used to determine eligibility.				
Types of Assistance (TOA)	Term used to identify different benefits HHSC administers.				
Uniform Resource Locator (URL)	A website address.				
Vendor	Organizations contracted by HHSC to complete specified work.				

HHS Benefits (State Portal) Log In

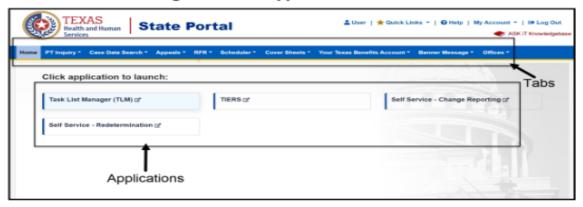
To log in you need the URL, your user name and password. Your user name ties you to your profile. Your profile dictates what you can see in State Portal and TIERS. If you forget your password, click the *Forgot Password?* hyperlink to reset it.



After a successful log in, you see the State Portal home page.



State Portal Home Page Tabs and Applications



Use tabs to navigate to different areas of the State Portal. On the home page, there are tabs such as **Home, PT Inquiry, Case Data Search**, etc. Your security profile determines which hyperlinks and tabs you can see.

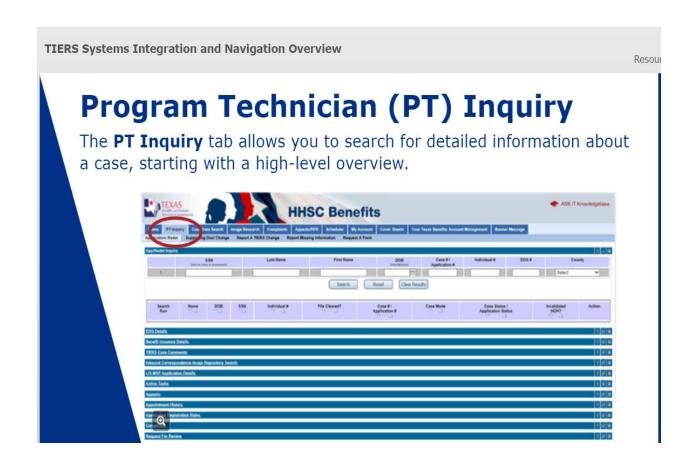
Click on an application to launch it. Applications include:

- Task List Manager (TLM)
- TIERS
- Self Service Change Reporting
- Self Service Redetermination

PT Inquiry

Perform inquiry in State Portal through **PT Inquiry**. Current and historical information is available for cases and applications. **PT Inquiry** information displays in portlets and primarily comes from TIERS. You may also perform inquiry in TIERS. The differences between inquiry in State Portal and TIERS are:

- State Portal provides easier access to multiple types of information in one place
- TIERS provides more historical information than the State Portal



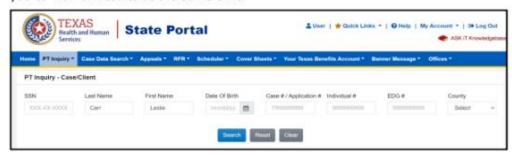
PT Inquiry Search

PT Inquiry offers the following search criteria fields:

- SSN
- Last Name
- First Name
- DOB
- Case/Application #
- Individual #
- EDG #
- County

When completing a search, use as many search criteria fields as possible to limit the search results. Click *Search* to retrieve any existing information.

There are two other buttons available in the search portlet. Reset clears search criteria in the search fields. Clear removes search criteria and results from a previous search. Completing another search does not remove the previous search results. Search results remain visible until you clear the results or log out, allowing you to view all results at the same time.





- 1. Enter search criteria
- 2. Click Search

The search results appear in the columns below the action buttons. Your search may display multiple results based on the criteria you entered. Review the results to identify whether any results match the case or individuals for whom you search.

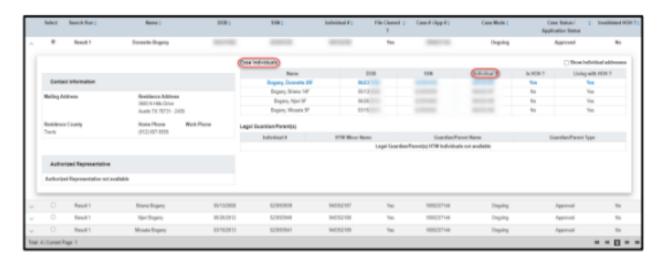




Steps

- Click the Expand/Collapse Row icon under the Select column for the matched case.
- Review the details to determine if the information matches the application data.

Note: When the match is not obvious after comparing the available information for the individual to the search results, you may have to click the *Show Details* icon and view details for more than one case. Look at the other household members, address and phone number to help you identify a match to the individual or case.



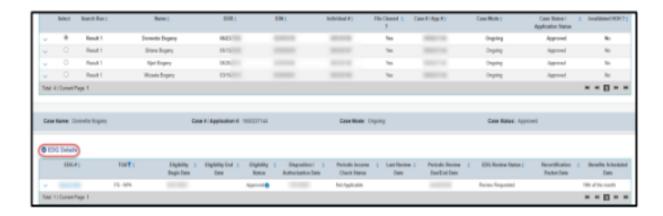


Steps

- 1. Click to de-select the Expand/Collapse Row icon.
- 2. Click the Select radio button.



After you make your selection, the row is bolded. The change to the selection indicates the corresponding portlets contain populated information.





Steps

- Click the + for EDG Details.
- 2. Review EDG Details information.

The EDG Details portlet displays existing EDGs and their statuses. For the Bogany household, there is an approved SNAP (Food Stamps - Non-Public Assistance) EDG

Clicking Show Details in the Action column displays a pop-up window showing basic information, such as EDG individuals, EDG address and more. Use the information to confirm you have the correct individual and EDG.

Reset/Clear Search Criteria

There are two other buttons available in the search portlet:

- · Reset clears search criteria in the search fields but not the search results.
- · Clear removes search criteria and results from a previous search.

Completing another search does not remove the previous search results. Search results remain visible until you clear the results or log out, allowing you to view all results at the same time.





Step

Click Clear.



The State Portal **Case Data Search** tab allows you to search individual or casespecific information, including forms, supporting documents, verifications and correspondence.

The Case Data Search tab contains the following dropdown selections:

- Case Data
- Advanced Inbound Search
- Advanced Outbound Search



Case Data

Use **Case Data Search – Case Data** to perform a simple search by *Case #*. After entering the case number and clicking *Search*, available information displays in the following expandable and collapsible portlets:

- · Inbound Correspondence Search
- Outbound Correspondence Search
- TIERS Correspondence Search
- TIERS Comments Search

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Home	PT inquiry *	Case Data Search - Appeals	RFR - Scheduler -	Cover Sheets *	Your Texas Benefits Account -	Berner Messag	e - Offices -	
Case	e Data Search	Advanced Inbound Search Advanced Outbound Search						
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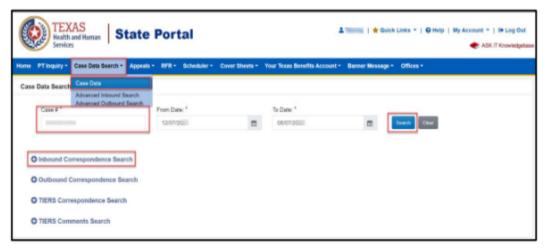
The Case #, From Date: and To Date: always require entries. The To Date: field defaults to the current day and the From Date: field defaults to six months prior to the current day. Update as necessary to search for your designated time period.

Note: Date range cannot exceed more than five years.

Clear removes search criteria and results from a previous search.



Inbound Correspondence Search



- Enter the Texas Integrated Eligibility Redesign System (TIERS) case number into the Case # field.
- 2. Accept the From Date: and To Date: defaults or update as needed.
- 3. Click Search.



- 4. Review the search results in the Inbound Correspondence Search portlet.
- Click the View icon (♠) in the Action column to review the document. The correspondence appears in a pop-up.



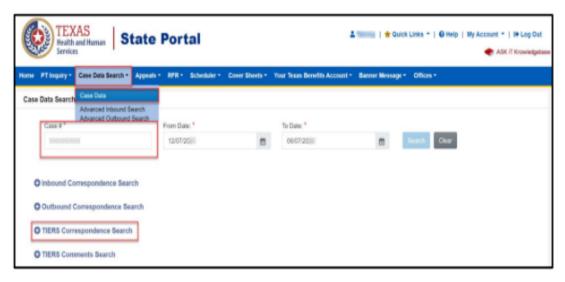


 Click Close () in the image viewer or the [x] in the upper right-hand corner of the Portable Document Format (PDF) to exit.

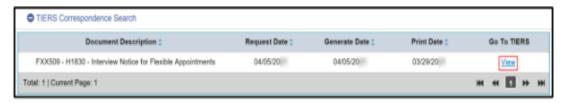




TIERS Correspondence Search



- Enter the TIERS case number into the Case # field.
- Accept the From Date: and To Date: defaults or update as needed.
- Click Search.



- 4. Review the search results in the TIERS Correspondence Search portlet.
- Click View hyperlink in the Go To TIERS column for the desired correspondence. This opens the TIERS History Correspondence Detail logical unit of work in a new window.





Click Preview to view the correspondence which appears in a separate PDF pop-up window.



Remember: Do not click *Reprint Later* or *Generate Form* unless a client specifically requests a copy of their correspondence. If desired, click *Print File* in the PDF pop-up to manually print the document.

To close the PDF correspondence image, and the TIERS History
 Correspondence Detail, click the [x] in the upper right corner for both
 windows.



TIERS Comments Search



- Enter the TIERS case number into the Case # field.
- Accept the From Date: and To Date: defaults or update as needed.
- 3. Click Search.
- 4. Review the search results in the TIERS Comments Search portlet.



 Click the Expand/Collapse Row (▼) for the desired comment in the Comments Description column.

