

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.

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Services

HHS Benefits

WARNING: This is a Texas Health and Human Services information resources system that contains State and/or U.S. Government information. By using this system you acknowledge and agree that you have no right of privacy in connection with your use of the system or your access to the information contained within it. By accessing and using this system you are consenting to the monitoring of your use of the system, and to security assessment and auditing activities that may be used for law enforcement or other legally permissible purposes. Any unauthorized use or access, or any unauthorized attempts to use or access, this system may subject you to disciplinary action, sanctions, civil penalties, or criminal prosecution to the extent permitted under applicable law.

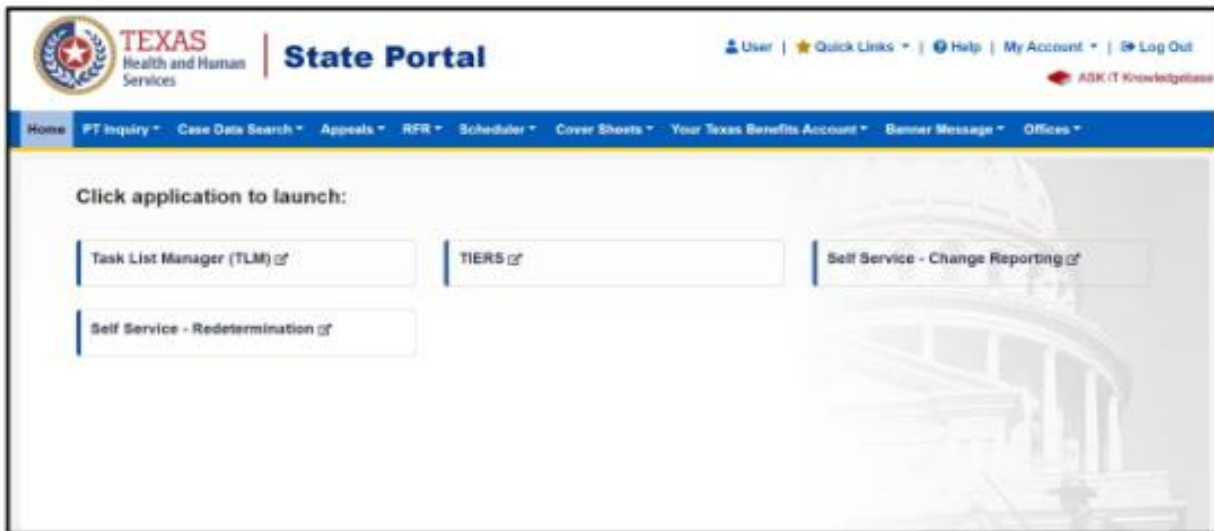
User Name *

Password *

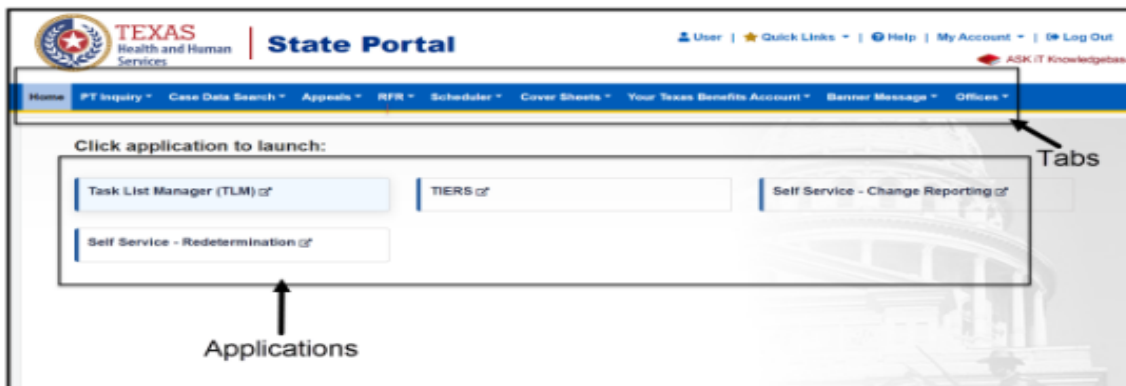
[Forgot Password?](#)

Login

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

Program Technician (PT) Inquiry

The **PT Inquiry** tab allows you to search for detailed information about a case, starting with a high-level overview.

HHSC Benefits

ASK IT Knowledgebase

Home | **PT Inquiry** | Case Search | Image Research | Complaints | Appeals/IFB | Scheduler | My Account | Cover Sheets | Your Texas Benefits Account Management | Banner Message

Application Status | Reporting Data Change | Report A TIERS Change | Report Missing Information | Request A Form

App/Model Inquiry

SSN	Last Name	First Name	DOB	Case # / Application #	Individual #	EDO #	County
1							Select

Search Reset Clear Results

Search Run	Name	DOB	SSN	Individual #	File Cleared?	Case # / Application #	Case Mode	Case Status / Application Status	Invalidated HQT	Action
EDO Details										
Benefits Issuance Details										
TIERS Case Comments										
Inbound Correspondence Image Repository Search										
LIS MSP Application Details										
Active Tasks										
Appeals										
Appointment History										
App Registration Rules										
Case										
Request For Review										

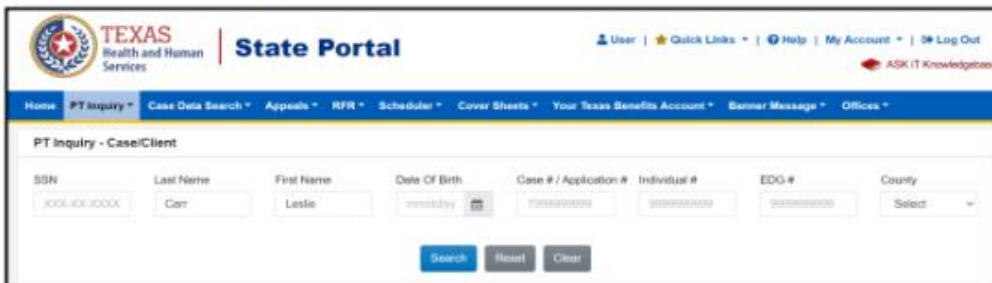
PT Inquiry Search

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.



The screenshot shows the Texas State Portal interface. At the top is the Texas Health and Human Services logo and the text "State Portal". Below this is a navigation bar with links: Home, PT Inquiry (active), Case Data Search, Appeals, RFR, Scheduler, Cover Sheets, Your Texas Benefits Account, Banner Message, and Offices. The main section is titled "PT Inquiry - Case/Client". It contains a search form with the following fields: SSN (with a masked value), Last Name (with "Carr"), First Name (with "Leslie"), Date Of Birth (with a calendar icon and "mm/dd/yyyy"), Case # / Application # (with a masked value), Individual # (with a masked value), EDG # (with a masked value), and County (a dropdown menu with "Select"). At the bottom of the form are three buttons: Search, Reset, and Clear.



Steps

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.

PT Inquiry - Case/Client

SSN:
 Last Name:
 First Name:
 Date Of Birth:
 Case # / Application #:
 Individual #:
 EDC #:
 County:

Select	Search Result	Name	DOB	SSN	Individual #	File Closed?	Case # / App #	Case Mode	Case Status / Application Status	Invited/Not Invited?
☐	Result 1	Dorinda Egery	06/24/1955	XXXXXXXXXX	XXXXXXXXXX	Yes	XXXXXXXXXX	Ongoing	Approved	No
☐	Result 1	Stana Egery	04/14/1955	XXXXXXXXXX	XXXXXXXXXX	Yes	XXXXXXXXXX	Ongoing	Approved	No
☐	Result 1	Hjer Egery	06/26/1955	XXXXXXXXXX	XXXXXXXXXX	Yes	XXXXXXXXXX	Ongoing	Approved	No
☐	Result 1	Wanda Egery	03/16/1955	XXXXXXXXXX	XXXXXXXXXX	Yes	XXXXXXXXXX	Ongoing	Approved	No

Total: 4 | Current Page: 1



Steps

1. Click the *Expand/Collapse Row* icon under the *Select* column for the matched case.
2. 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.

Select	Search Row	Name	DOB	SIN	Individual #	File Closed	Case # / App #	Case Mode	Case Status / Application Status	Invalidated HCR #
☒	Result 1	Donato Eguery	06/23/1988	52090308	54032187	Yes	188037148	Ongoing	Approved	No

Contact Information

Mailing Address

Residence Address
3600 N 14th Drive
Austin TX 78731 - 2400

Residence County

Tarrant

Home Phone

(512) 557-5555

Work Phone

Authorized Representative

Authorized Representative not available

Case Individuals

Name	DOB	SIN	Individual #	In HCR?	Living with HCR?
Eguery, Donato 25F	06/23/1988	52090308	54032187	Yes	Yes
Eguery, Brian 14F	05/13/2012	52090308	54032188	No	Yes
Eguery, Ngai 0F	06/24/2011	52090308	54032189	No	Yes
Eguery, Monica 0F	03/15/2013	52090308	54032190	No	Yes

Legal Guardian/Parent(s)

Individual #	HTM Minor Name	Guardian/Parent Name	Guardian/Parent Type
Legal Guardian/Parent(s) HTM Individuals not available			

☐	Result 1	Brian Eguery	05/13/2012	52090308	54032188	Yes	188037148	Ongoing	Approved	No
☐	Result 1	Ngai Eguery	06/24/2011	52090308	54032189	Yes	188037148	Ongoing	Approved	No
☐	Result 1	Monica Eguery	03/15/2013	52090308	54032190	Yes	188037148	Ongoing	Approved	No

Total: 4 - Current Page: 1



Steps

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

Select	Search Row	Name	DOB	SIN	Individual #	File Closed	Case # / App #	Case Mode	Case Status / Application Status	Invalidated HCR #
☒	Result 1	Donato Eguery	06/23/1988	52090308	54032187	Yes	188037148	Ongoing	Approved	No
☐	Result 1	Brian Eguery	05/13/2012	52090308	54032188	Yes	188037148	Ongoing	Approved	No
☐	Result 1	Ngai Eguery	06/24/2011	52090308	54032189	Yes	188037148	Ongoing	Approved	No
☐	Result 1	Monica Eguery	03/15/2013	52090308	54032190	Yes	188037148	Ongoing	Approved	No

Total: 4 - Current Page: 1

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

Select	Search Result	Name	DOB	SIN	Individual #	File Closed ?	Case # / App #	Case Mode	Case Status / Application Status	Investigated/NOI #
☒	Result 1	Dorenda Bogany	04/23/1955	000000000	000000000	Yes	000000000	Ongoing	Approved	No
☒	Result 1	Briana Bogany	05/13/1995	000000000	000000000	Yes	000000000	Ongoing	Approved	No
☒	Result 1	Nigel Bogany	04/26/1995	000000000	000000000	Yes	000000000	Ongoing	Approved	No
☒	Result 1	Wicanda Bogany	03/15/2000	000000000	000000000	Yes	000000000	Ongoing	Approved	No
Total: 4 / Current Page: 1										1234

Case Name: Dorenda Bogany

Case # / Application #: 1000207144

Case Mode: Ongoing

Case Status: Approved

EDG Details

EDG #	TID	Eligibility Begin Date	Eligibility End Date	Eligibility Status	Disposition / Authorization Date	Periodic Income Check Status	Last Review Date	Periodic Review Due/End Date	EDG Review Status	Recertification Pendency	Benefits Scheduled Date
☒	000000000	FS - SNAP	000000000	Approved	000000000	Not Applicable	000000000		Review Requested		10th of the month
Total: 1 / Current Page: 1										1	



Steps

1. 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.

PT Inquiry - CaseClient

Select	Search Result	Name	DOB	DOB	Individual #	File Closed	Case # / App #	Case Status	Case Status / Application Status	Available (DOB #)
☒	Result 1	Shawnte Rogers	06/20/1980	02/08/2018	00000186	Yes	00000186	Pending	Approved	No
☐	Result 1	Shawnte Rogers	06/20/1980	02/08/2018	00000187	No	00000186	Pending	Approved	No
☐	Result 1	Shawnte Rogers	06/20/1980	02/08/2018	00000188	No	00000186	Pending	Approved	No
☐	Result 1	Shawnte Rogers	06/20/1980	02/08/2018	00000189	No	00000186	Pending	Approved	No

Total: 4 (Current Page: 1)



Step

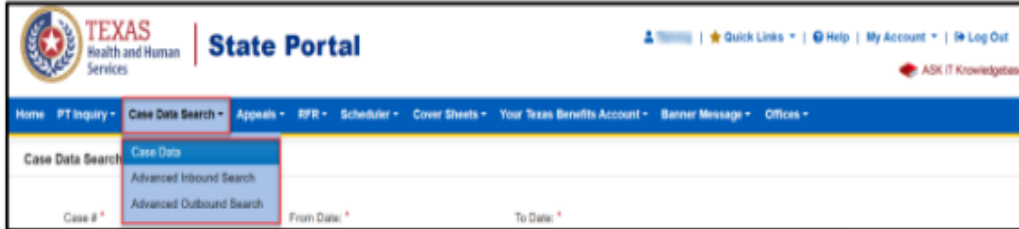
Click *Clear*.

Case Data Search Reference Guide

The State Portal **Case Data Search** tab allows you to search individual or case-specific 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*

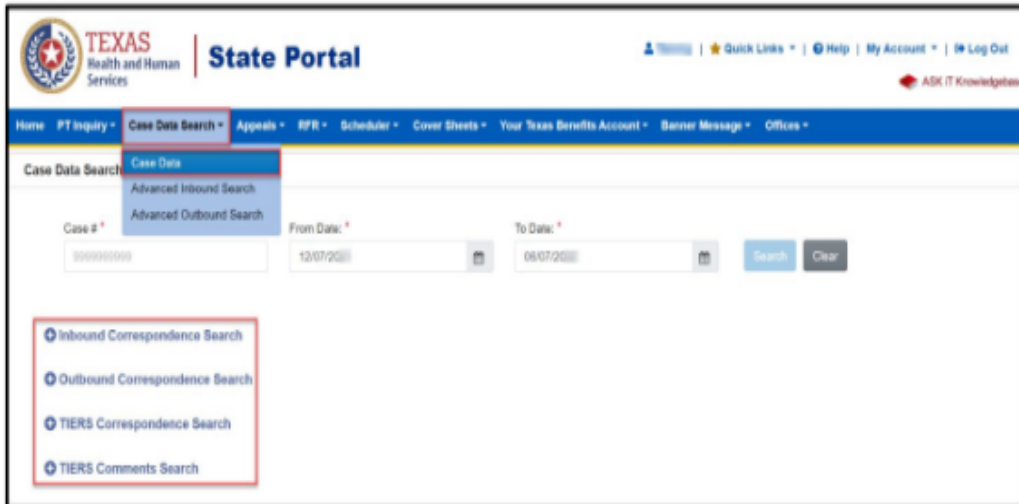


The screenshot shows the Texas State Portal header with the 'Case Data Search' dropdown menu open. The menu options are 'Case Data', 'Advanced Inbound Search', and 'Advanced Outbound Search'. Below the menu, there are input fields for 'Case #', 'From Date', and 'To Date'.

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*



The screenshot shows the Texas State Portal Case Data Search results page. The 'Case Data' dropdown menu is open, showing the same three options as before. Below the menu, there are input fields for 'Case #', 'From Date', and 'To Date'. The 'Case #' field contains the value '000000000'. The 'From Date' field contains the value '12/07/20'. The 'To Date' field contains the value '06/07/20'. There are 'Search' and 'Clear' buttons. Below the input fields, there is a list of search options: 'Inbound Correspondence Search', 'Outbound Correspondence Search', 'TIERS Correspondence Search', and 'TIERS Comments Search'.

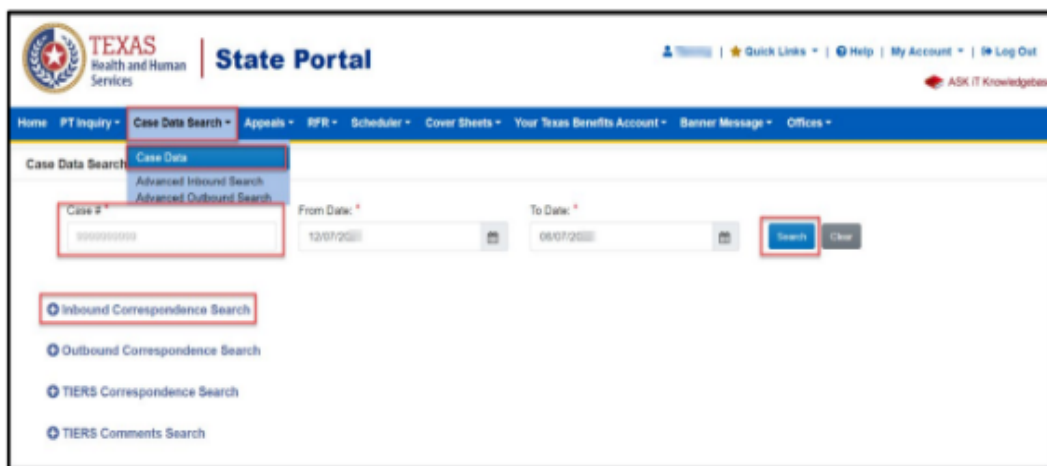
The *Case #*, *From Date:* and *To Date:* always require entries. The *To Date:* field defaults to the current day and the *From Date:* field defaults to six months prior to the current day. Update as necessary to search for your designated time period.

Note: Date range cannot exceed more than five years.

Clear removes search criteria and results from a previous search.



Inbound Correspondence Search



The screenshot shows the Texas State Portal interface. The 'Case Data Search' section is active, with a dropdown menu showing 'Case Data', 'Advanced Inbound Search', and 'Advanced Outbound Search'. The 'Case #' field contains '0000000000'. The 'From Date' field is '12/07/20' and the 'To Date' field is '06/07/20'. The 'Search' button is highlighted. Below the search fields, the 'Inbound Correspondence Search' link is highlighted.

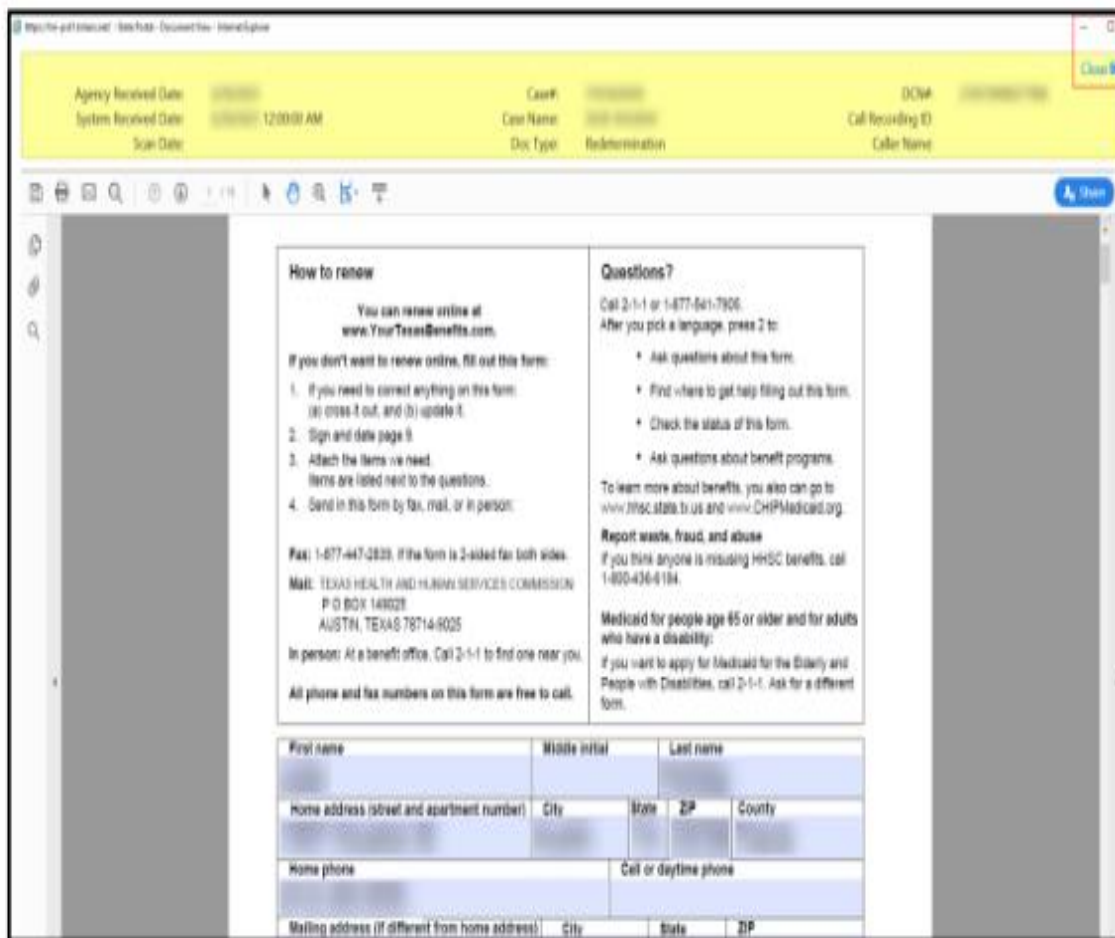
1. Enter the Texas Integrated Eligibility Redesign System (TIERS) case number into the *Case #* field.
2. Accept the *From Date:* and *To Date:* defaults or update as needed.
3. Click *Search*.

Inbound Correspondence Search

Case #	DCN	Doc Type	Page Count	Last Name	First Name	Agency Received Date	System Received Date	Scan Date	Signed By Phone	Actions
0000000000	0000000000000000	Redetermination	15	WILLIAMS	JANE	03/29/20	03/29/20			  

Total: 1 | Current Page: 1

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



Agency Received Date: 12/15/2023
System Received Date: 12/15/2023 12:00:00 AM
Scan Date:

Case#: 123456789
Case Name: John Doe
Doc Type: Redetermination

DCWP: 123456789
Call Recording ID: 123456789
Call Name:

How to renew

You can renew online at www.YourTexasBenefits.com.

If you don't want to renew online, fill out this form:

1. If you need to correct anything on this form: (a) cross it out, and (b) update it.
2. Sign and date page 9.
3. Attach the items we need. Items are listed next to the questions.
4. Send in this form by fax, mail, or in person.

Fax: 1-877-447-2829. If the form is 2-sided fax both sides.
Mail: TEXAS HEALTH AND HUMAN SERVICES COMMISSION
P O BOX 148028
AUSTIN, TEXAS 78714-8025
In person: At a benefit office. Call 2-1-1 to find one near you.
All phone and fax numbers on this form are free to call.

Questions?

Call 2-1-1 or 1-877-641-7906.
After you pick a language, press 2 to:

- Ask questions about this form.
- Find where to get help filing out this form.
- Check the status of this form.
- Ask questions about benefit programs.

To learn more about benefits, you also can go to www.HHSC.state.tx.us and www.CHIPMedicaid.org.

Report waste, fraud, and abuse

If you think anyone is misusing HHSC benefits, call 1-800-436-6184.

Medicaid for people age 65 or older and for adults who have a disability:

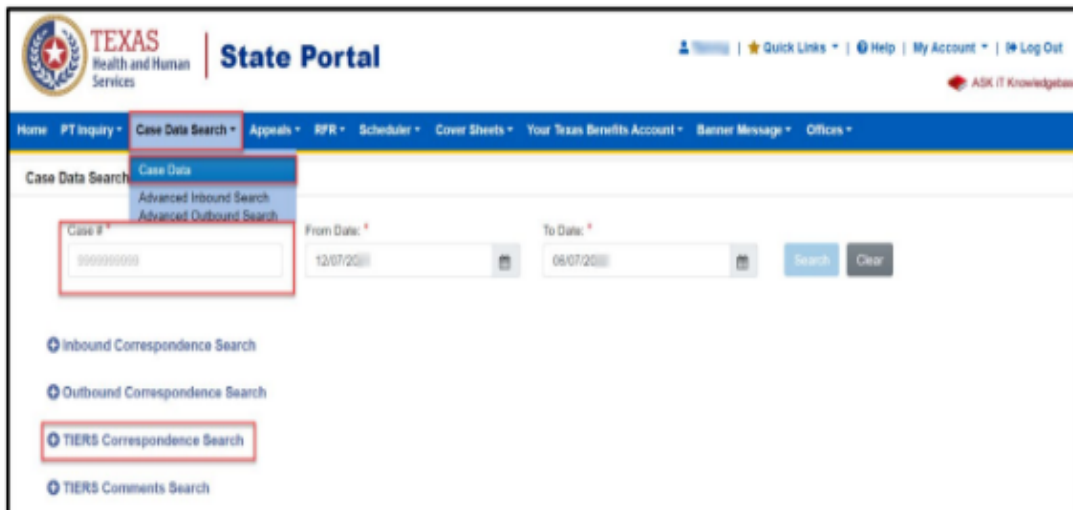
If you want to apply for Medicaid for the Elderly and People with Disabilities, call 2-1-1. Ask for a different form.

First name	Middle initial	Last name		
Home address (street and apartment number)		City	State	ZIP
Home phone		Cell or daytime phone		
Mailing address (if different from home address)		City	State	ZIP

6. Click *Close* (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



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Home | PT Inquiry | **Case Data Search** | Appeals | RFR | Scheduler | Cover Sheets | Your Texas Benefits Account | Banner Message | Offices

Case Data Search

Case Data
Advanced Inbound Search
Advanced Outbound Search

Case #
[Text Field]

From Date: 12/07/20 To Date: 06/07/20

[Search] [Clear]

☐ Inbound Correspondence Search
☐ Outbound Correspondence Search
☒ **TIERS Correspondence Search**
☐ TIERS Comments Search

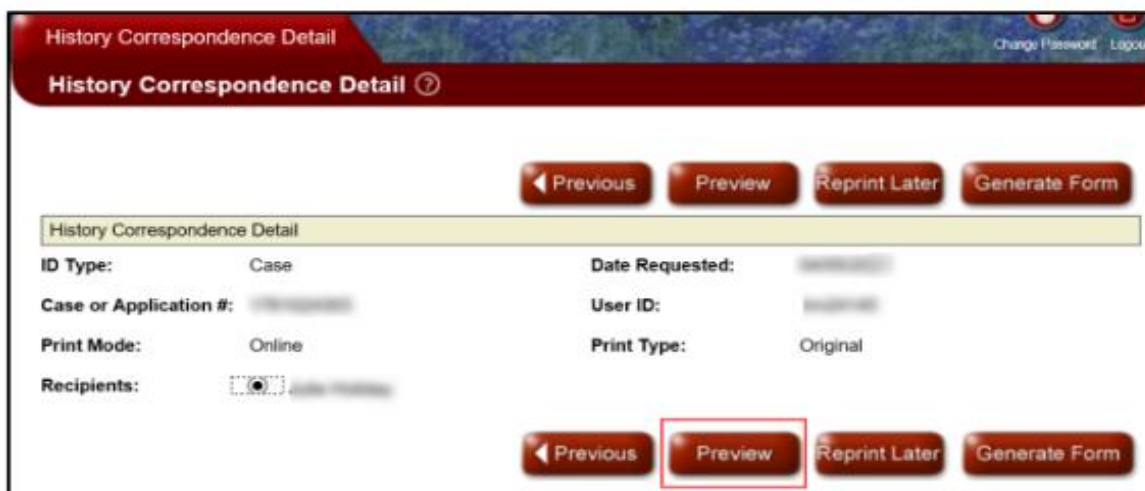
1. Enter the TIERS case number into the *Case #* field.
2. Accept the *From Date:* and *To Date:* defaults or update as needed.
3. Click *Search*.

TIERS Correspondence Search

Document Description	Request Date	Generate Date	Print Date	Go To TIERS
FXK509 - H1830 - Interview Notice for Flexible Appointments	04/05/20	04/05/20	03/29/20	View

Total: 1 | Current Page: 1

4. Review the search results in the *TIERS Correspondence Search* portlet.
5. 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.



History Correspondence Detail [Change Password](#) [Logout](#)

History Correspondence Detail ?

◀ Previous Preview Reprint Later Generate Form

History Correspondence Detail

ID Type: Case Date Requested:

Case or Application #: User ID:

Print Mode: Online Print Type: Original

Recipients: ☒ Print File

◀ Previous Preview Reprint Later Generate Form

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



Current User:

My Schedule:

My TERS Function:

TEXAS HEALTH AND HUMAN SERVICES COMMISSION
P.O. BOX 149029
AUSTIN, TEXAS 78714-9029

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Health and Human
Services Commission

Need help? Go to YourTexasBenefits.com
or call 2-1-1 or 1-877-541-7905.
If you have a hearing or speech disability,
call 7-1-1 or any relay service.
All numbers are free to call.

We need to talk with you about your case because you are applying for or renewing benefits.

1-800-555-5555
Call any time Monday to Friday, 8:30 a.m. to 4:30 p.m. It's a free call.
Expect to be on the call about 30 minutes for your interview.
Please have the items listed on the back of this notice with you during the call.

Benefits you are applying for or are renewing:

My TERS Function:

To TERS:

IS Page:

Comments:

Comments:

Comments:

Build Details

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.

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



1. Enter the 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 *TIERS Comments Search* portlet.

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

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