ACES Portal User's Guide

(Client – External Use Only)

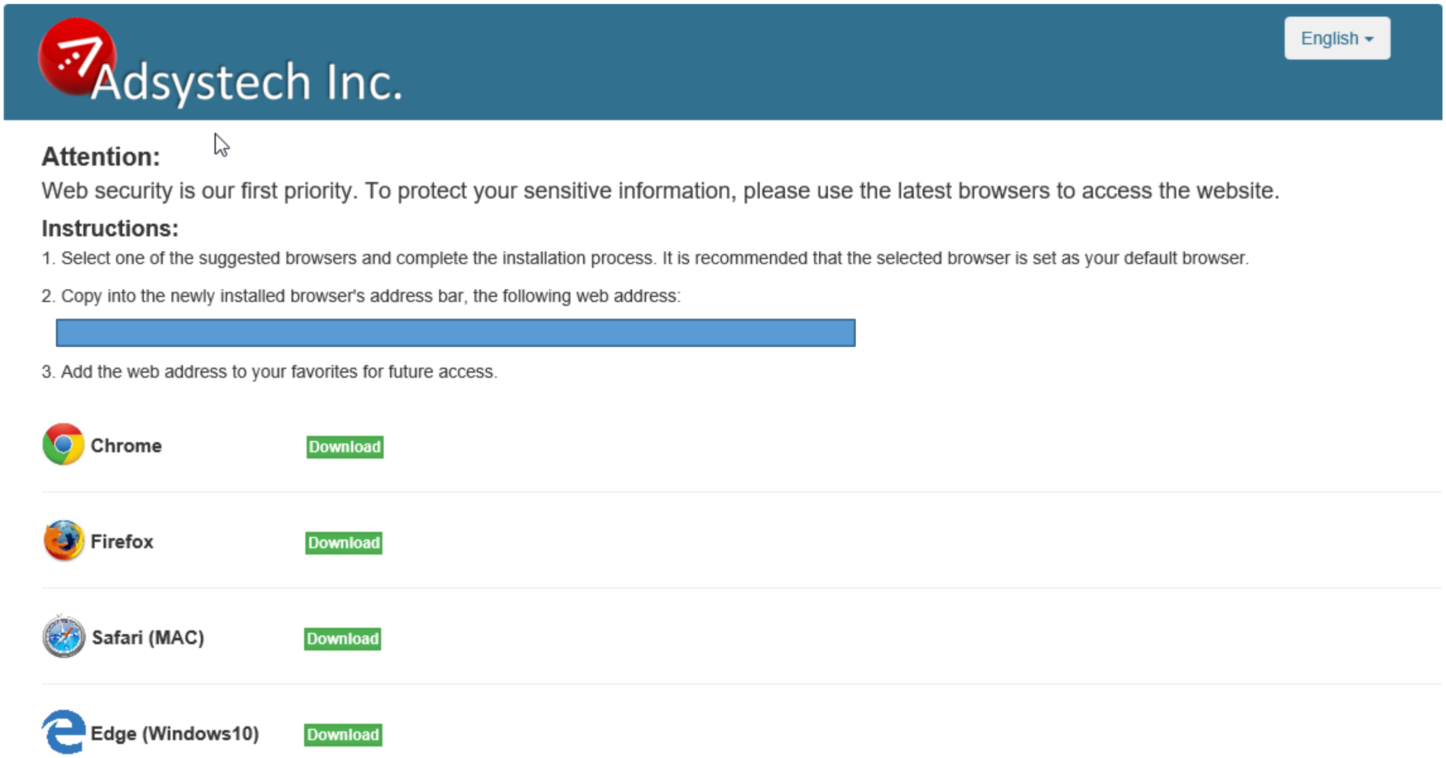
July 7, 2022

Contents

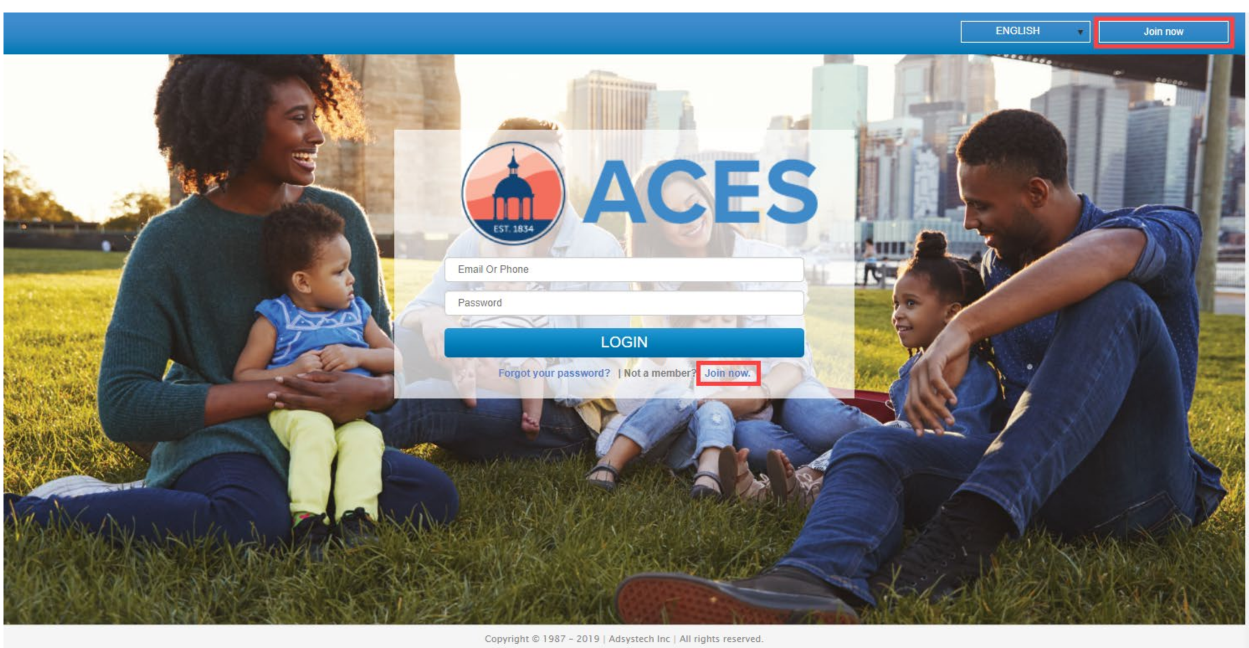
First Time Log-In

Use Chrome to access ACES at: https://s73.esserver.com/AES040.Enginuity.Web.V6//?role=5505#/pLoginWithType

If you do not use Chrome, you will see the following screen with a listing of supported browsers:



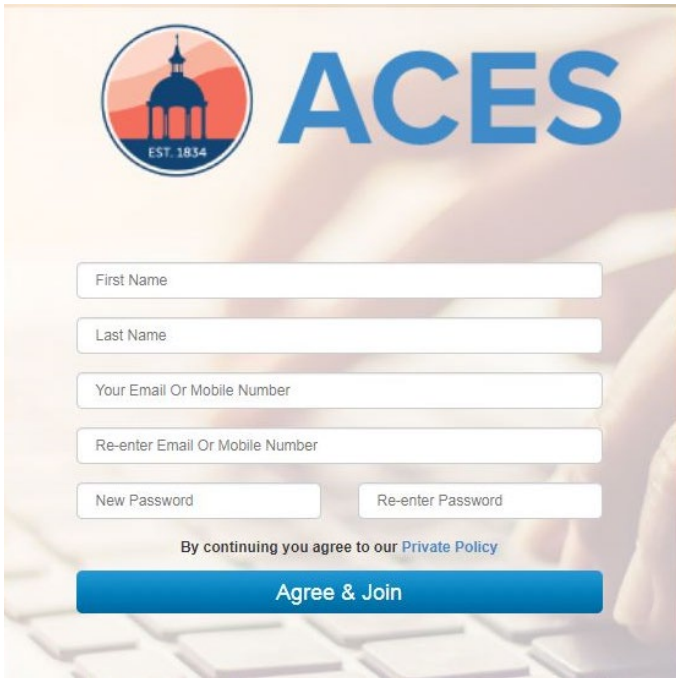
On your first visit to the Portal, you will need to set-up an account by clicking one of the Join Now buttons.



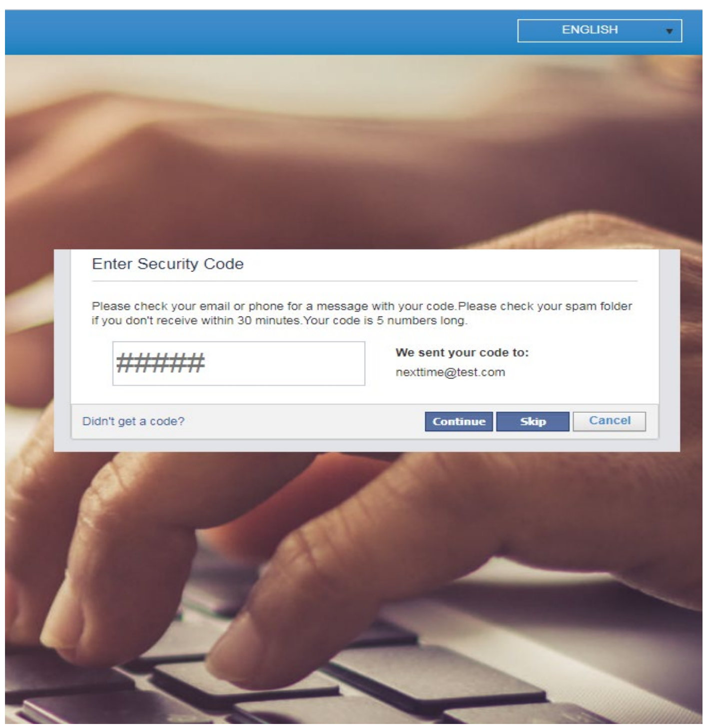
Fill out the First Name, Last Name, E-mail or mobile number (which will become your Account ID), and Password fields. Click Agree & Join.

NOTE: If you do not have an E-mail account or a mobile number, you will need to contact Member Services at:

(813) 272-5040



A security code will be sent to either the Email, or Mobile device that you supplied. Enter this security code to proceed.



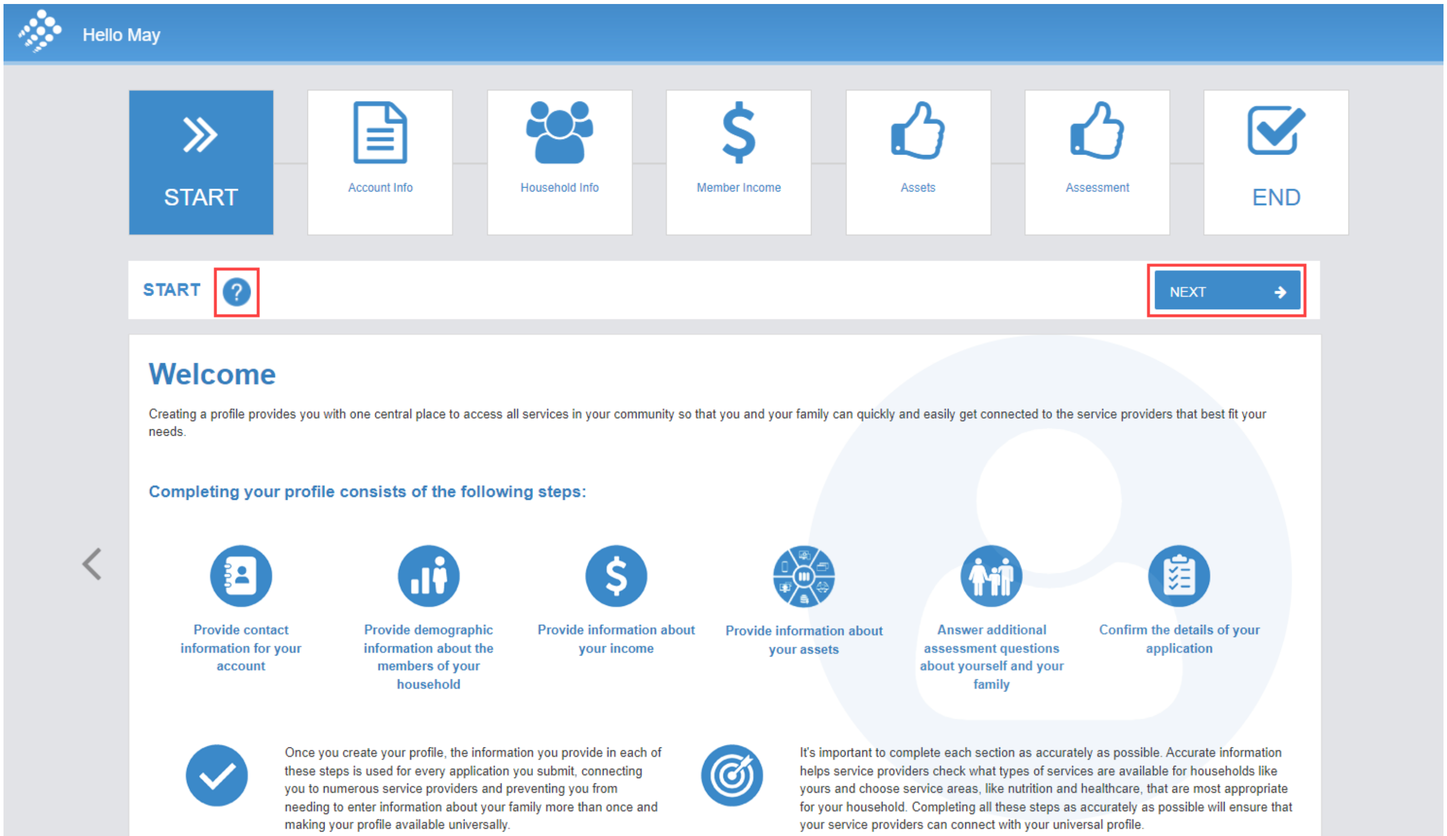
NOTE: If you do not receive your notification within a couple of minutes, please check your junk/spam folder.

Welcome

The welcome page provides an overview of what will be expected/needed in the process.

Creating a Profile provides you with one central place to access all services in your community so that you and your family can quickly and easily get connected to the Service Providers who support your needs.

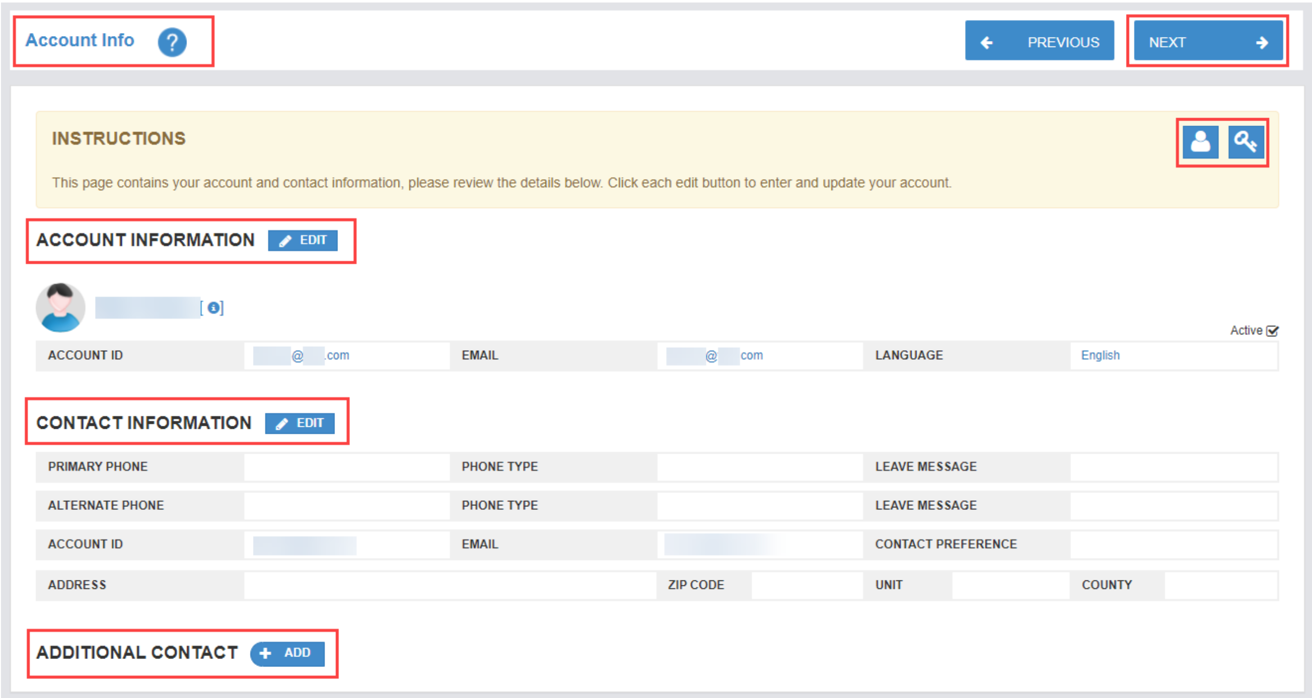
NOTE: Clicking the '?' will provide helpful information for completing the page.



When you click NEXT from the START menu, you move to the Account Info page.

Account Info

This page allows you to update your account information and change your password.

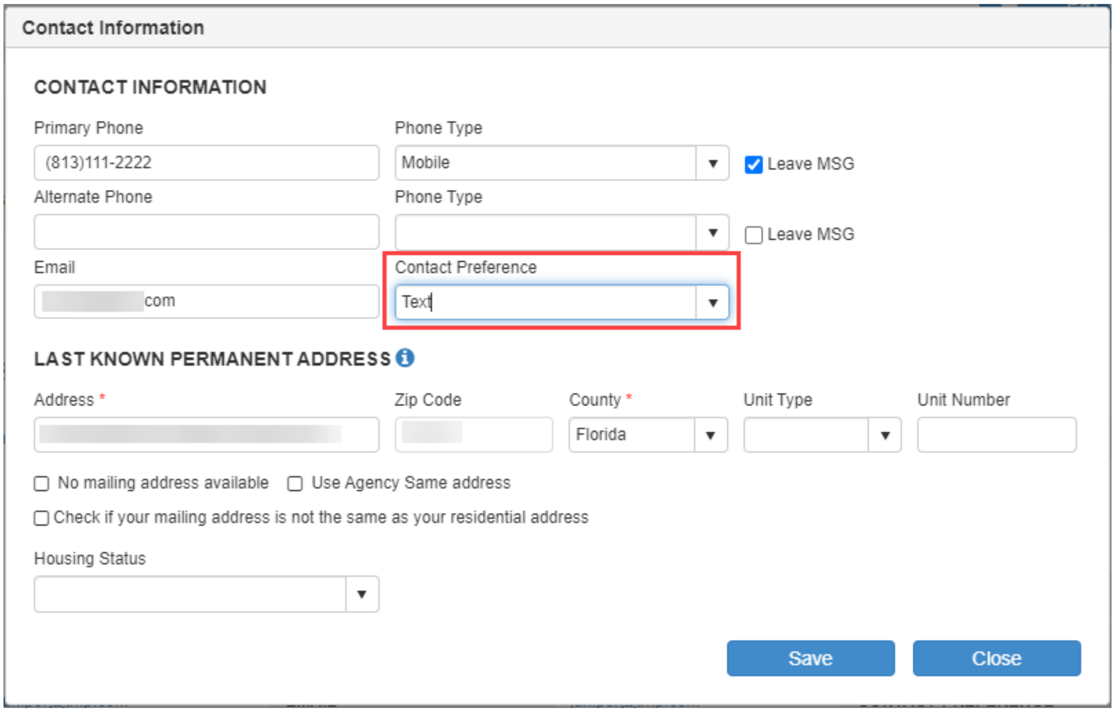


Account Information

If you click the Edit icon, the Edit Account entry window appears. Here, you can change your name and language preference.

Contact Information

This section is where you enter your contact and address information. This is where you select your preferred contact method.



Additional Contact

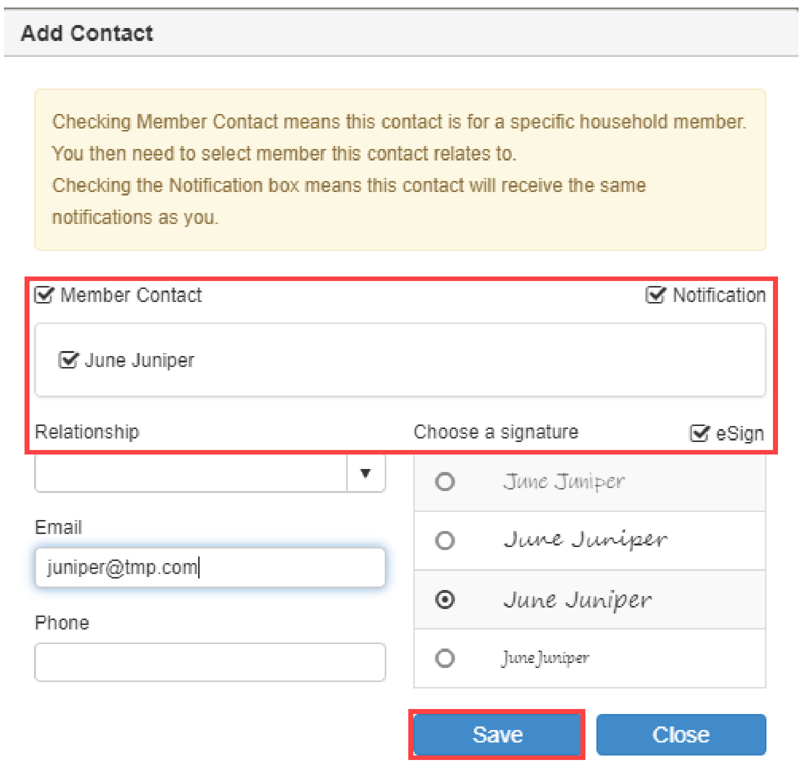
To add additional contacts, click the +Add button. Once you begin typing the address, Google Maps will provide a list of addresses to select from. After each selection, the city, state, zip and county will auto populate.

NOTE: This is contact information only, not household member information. Household members are added in the next section, Household Info.

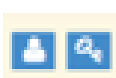
In the Add Contact Window, complete the requested information. Checkmark applicable boxes if:

- Member Contact (select contact's check box and option to provide an e-signature)
- Notifications are sent to selected member
- eSign lets you choose a signature to be used when electronically signing forms.

Select SAVE.

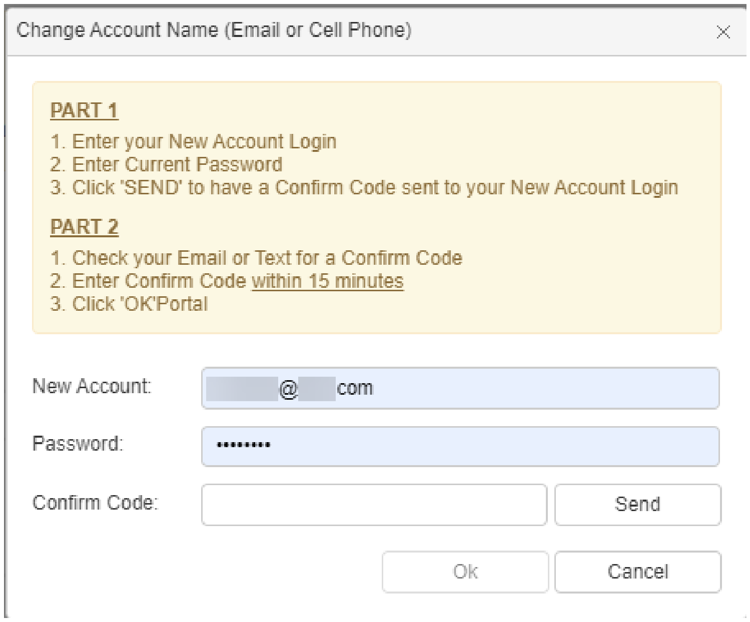


After completing, click NEXT. If, at any point, you need to go back to a page, you can click PREVIOUS. After setting up additional family members on the Household Info page, you may want to come back to Account Info to set up the eSign information.

NOTE: Clicking on the  icons on the right side of the INSTRUCTIONS box will allow you to change your account information or change your password.

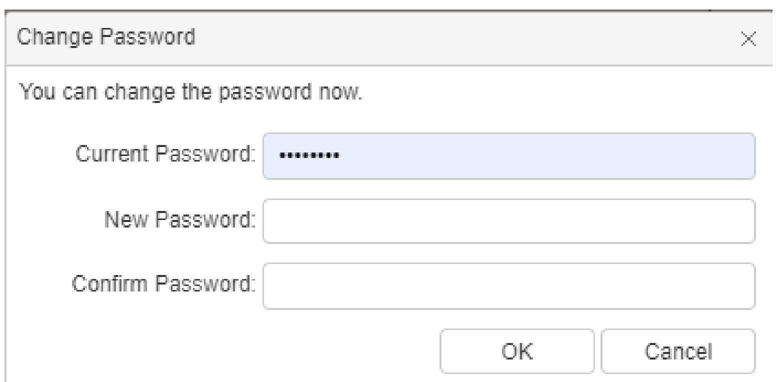
Change Account

You can change your Account Name (Email or Mobile number).



Change Password

You can also change your Password.



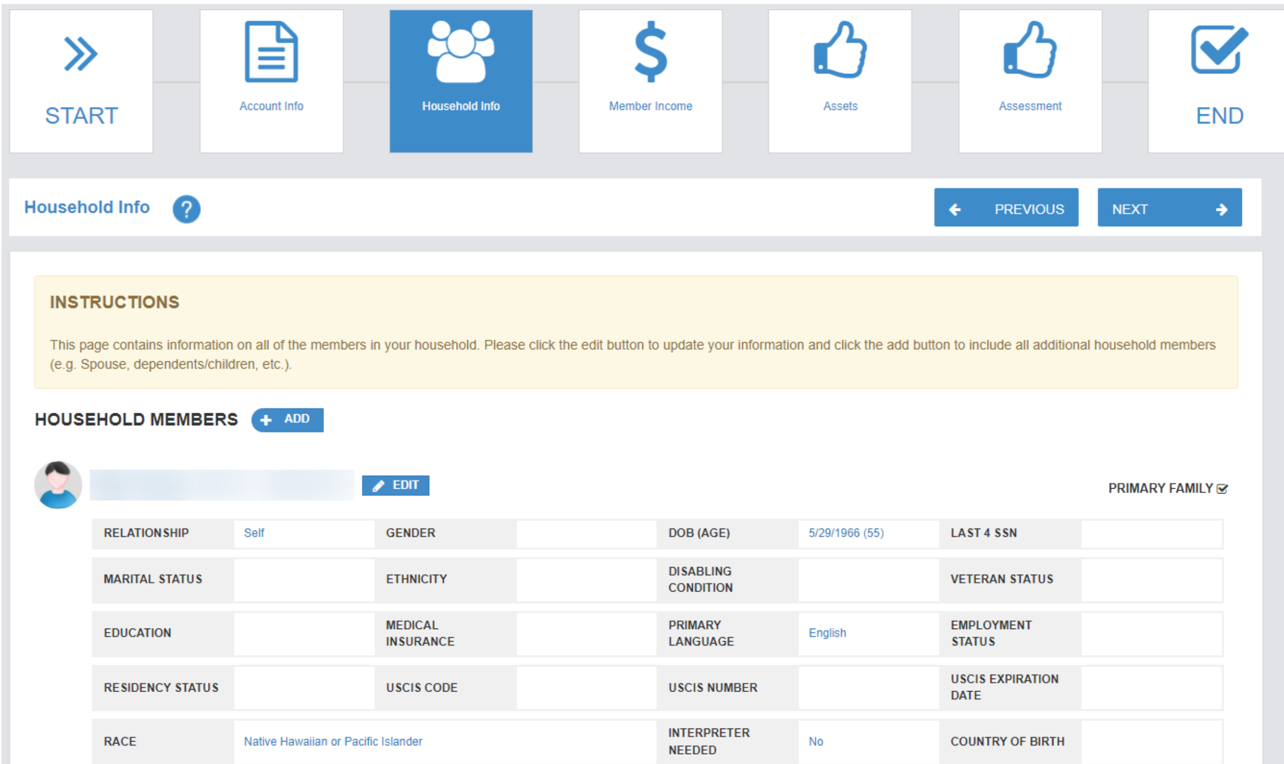
Household Info

This page allows you to edit your personal information and add/edit your household members.

Click on the Edit icon to add or update your household member information. If there are other members in the household, click on the Add button to enter them. It is important to include everyone who is part of the household, even if they are not part of your family.

There is a Primary Family checkbox on the right side of each member's information. This denotes if the household member will be considered as part of the family when applying for services.

NOTE: As you enter new fields, those outlined in red (or notated with a red *) are required.

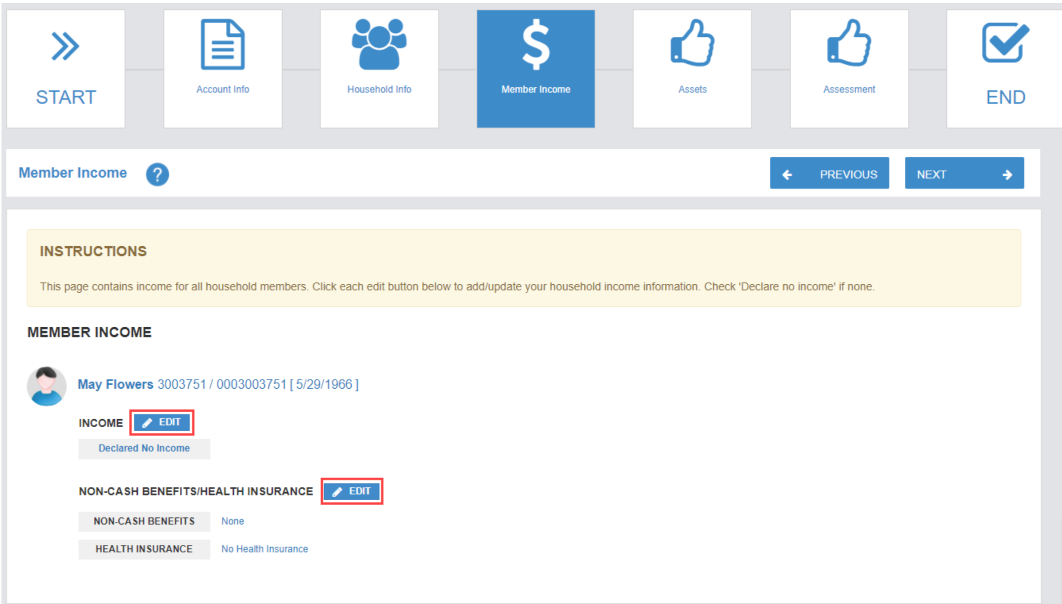


After completing, click NEXT.

Member Income

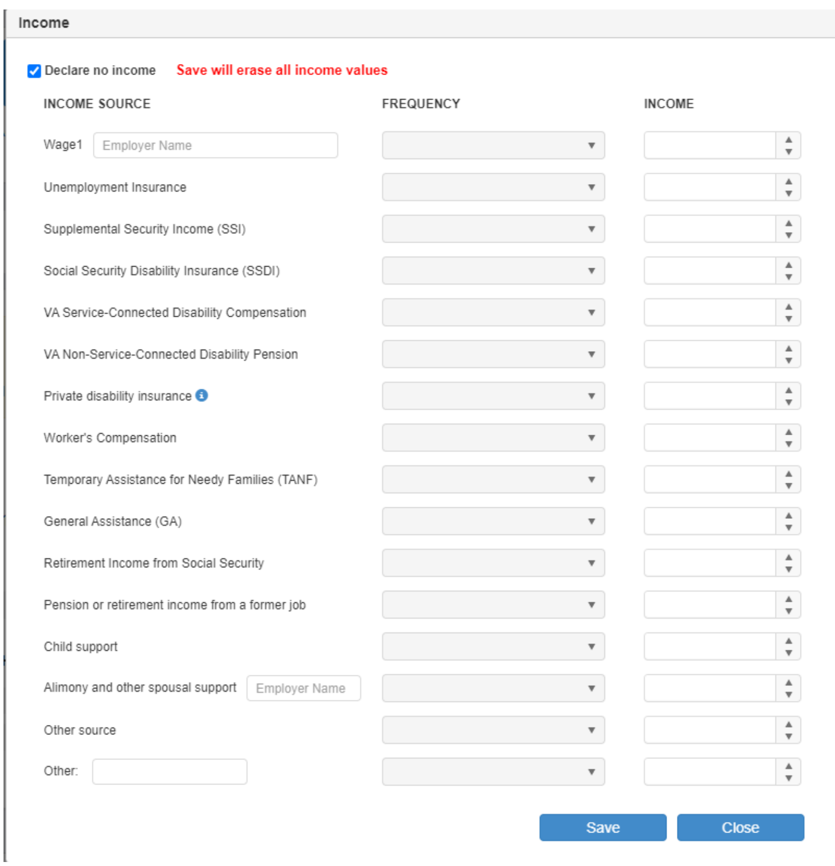
This page allows you to enter your household income, non-cash benefits, and health insurance information.

Click on the EDIT buttons for each of the categories to bring up the entry window.



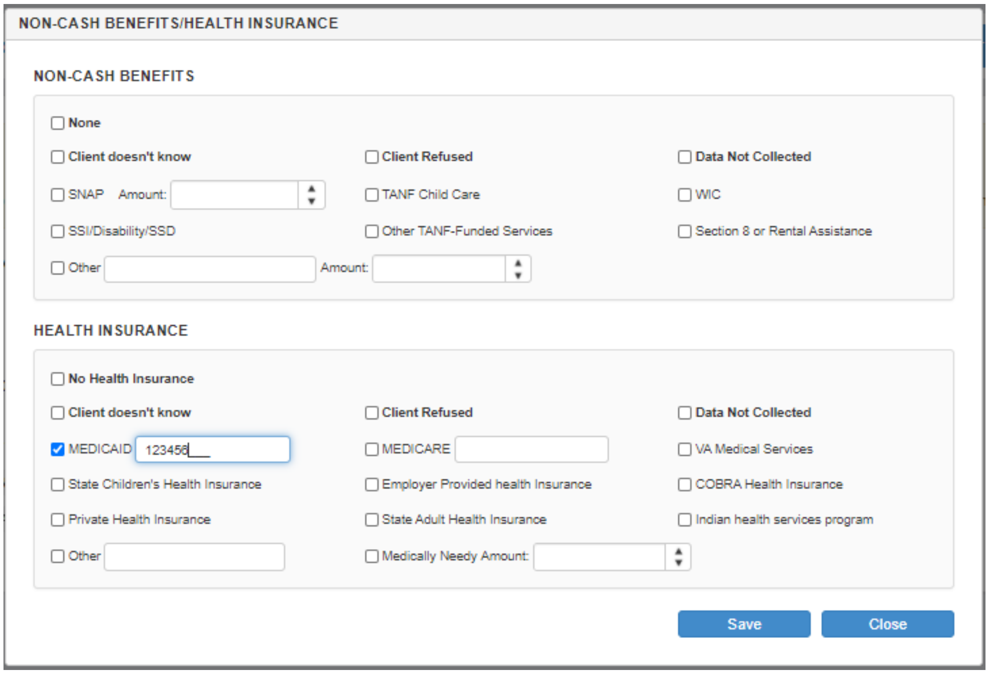
Income Entry Window

Enter the sources, frequency, and net income amounts in this section.



Non-Cash Benefits / Health Insurance Entry Window

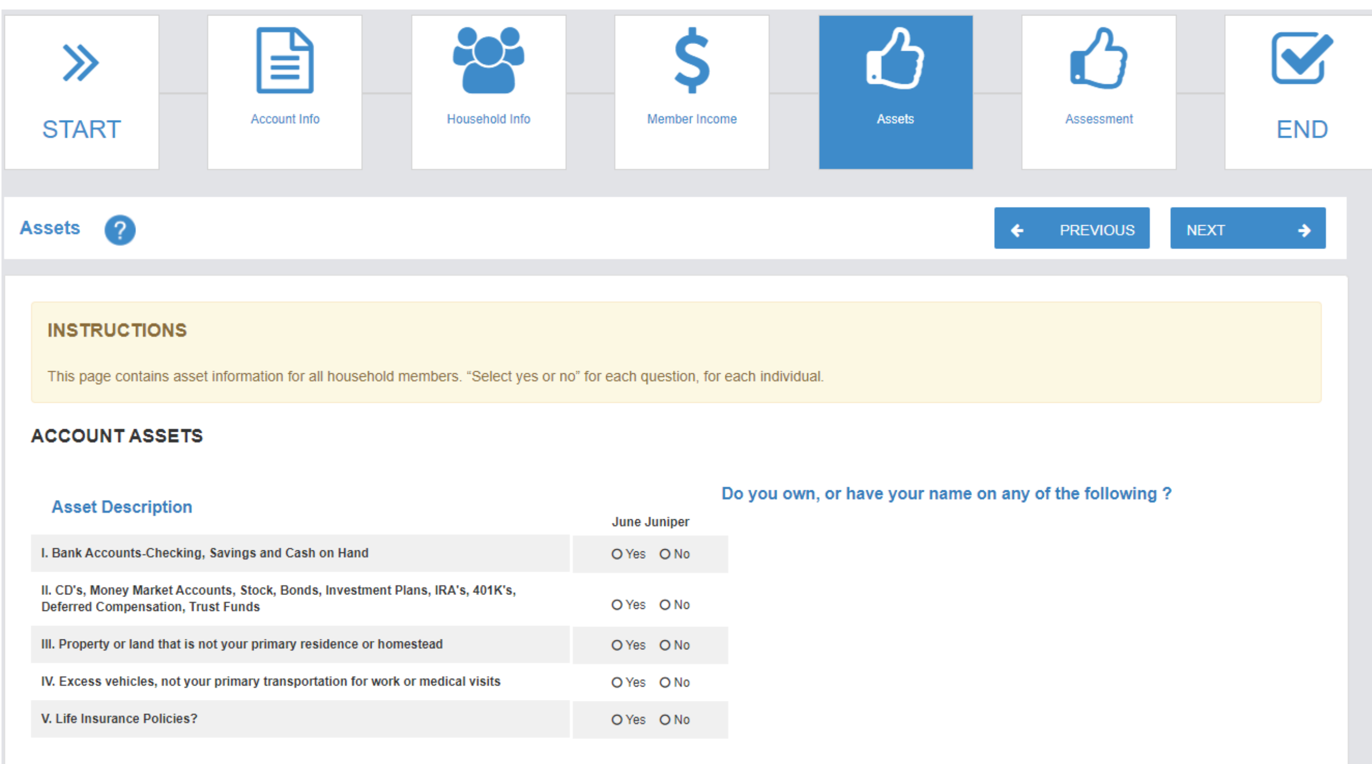
Account for any non-cash benefits in this section.



After completing, click NEXT.

Assets

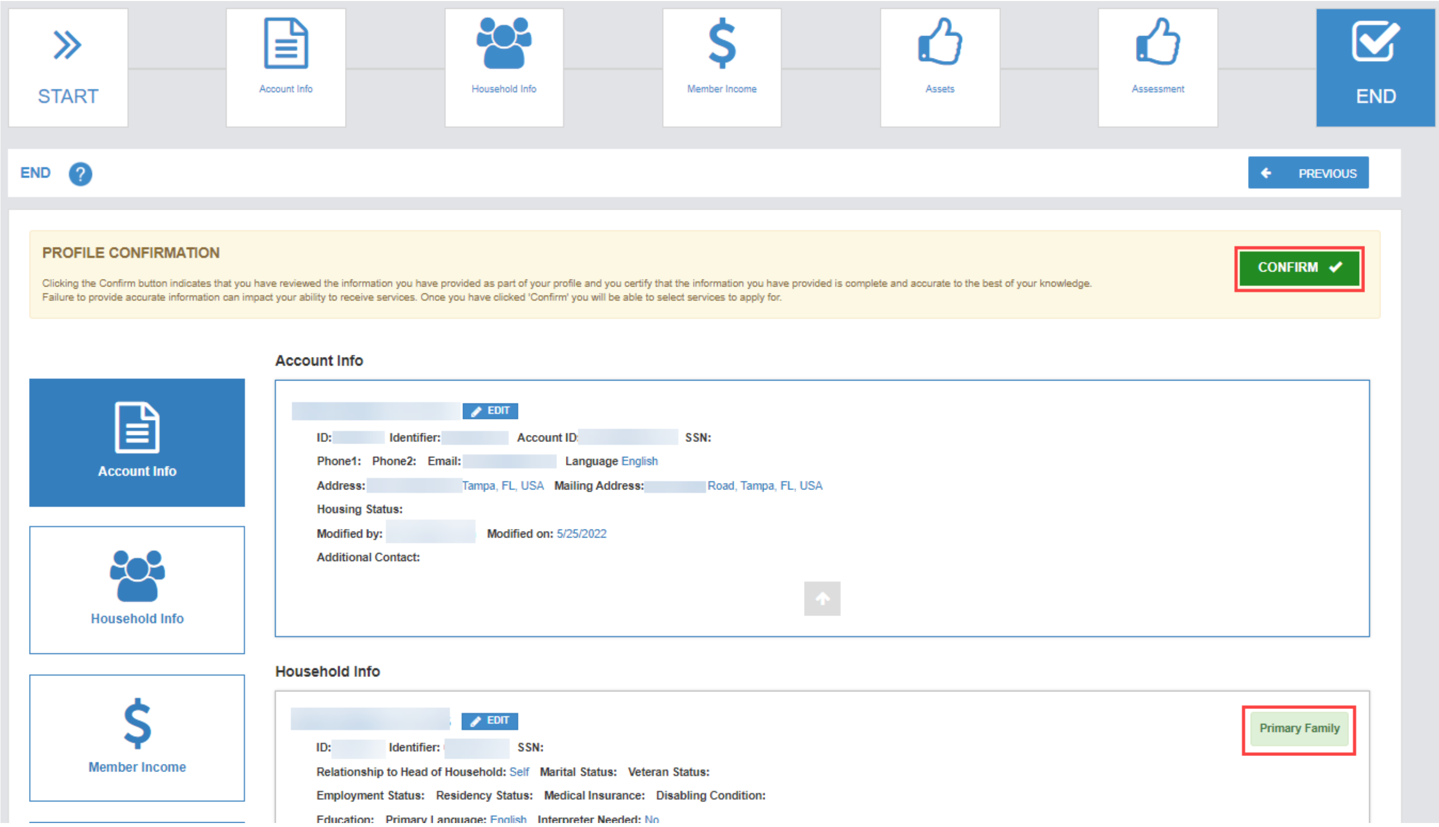
To apply for services, it is required that the Asset questions be answered for each family member. The Case Manager will ask for additional information if needed.



After completing, click NEXT.

Profile Confirmation

This provides an overview of the information that was entered in the prior steps. You can review the Account Info and Household Info details, and if the information is correct, click CONFIRM. By clicking CONFIRM, you have completed your profile. On the next screen, you will be able to select services to apply for.



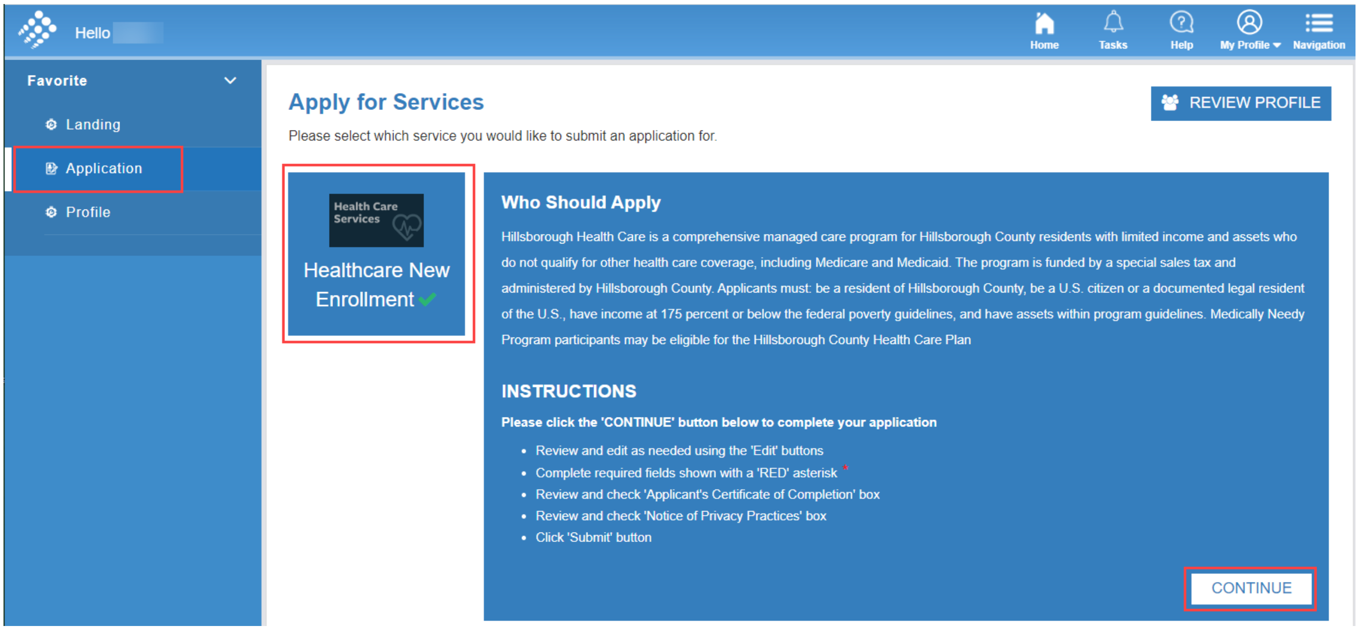
The Primary Family indicator (on the right side of the Household Info section) indicates this person will be included on the application.

Application / Apply for Services

This page displays a summary of who should apply and an overview of the instructions.

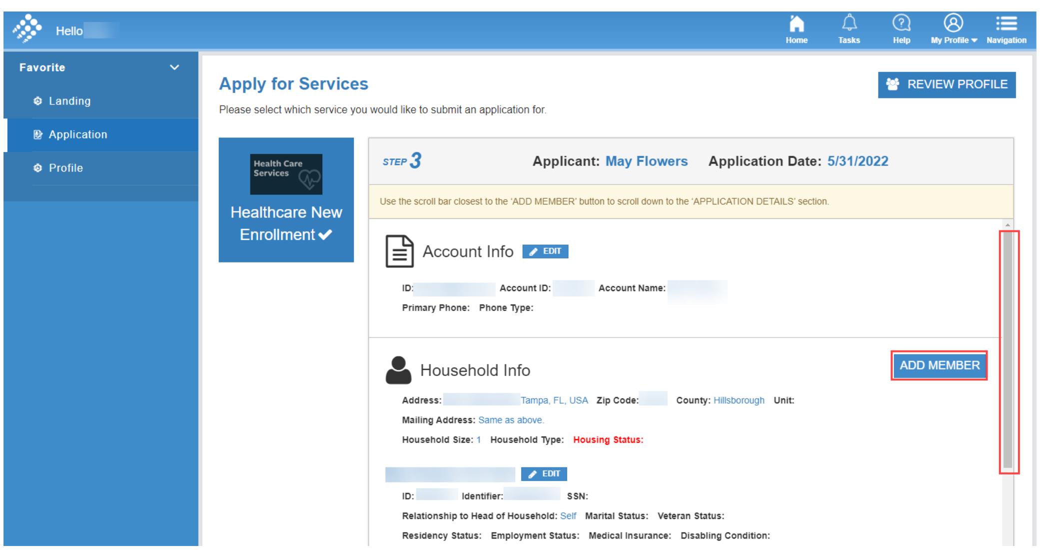
When you are ready to complete an application:

1. Click the menu option Application
2. Select the Healthcare New Enrollment button
3. Click CONTINUE.



The application will be pre-populated using the information you supplied. You can add additional family members that may have been forgotten or omitted by clicking the ADD MEMBER button. You may also edit the Account Info and Household Info sections by clicking the Edit icon in the desired area.

Use the scroll bar closest to the ADD MEMBER button to scroll down to the APPLICATION DETAILS section.



NOTE: Any missing fields or errors will be highlighted in red.

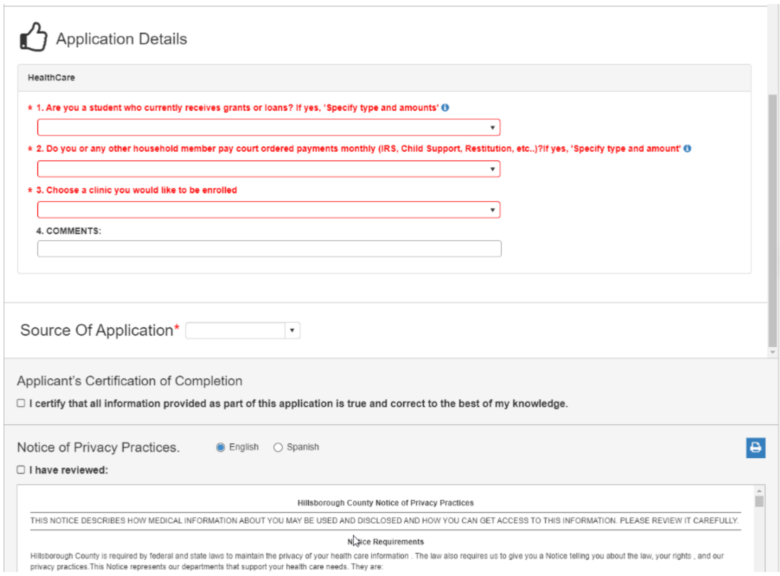
Application Questions

This section contains required Application Details. Depending on the answer to the question, another box may appear asking for further details.

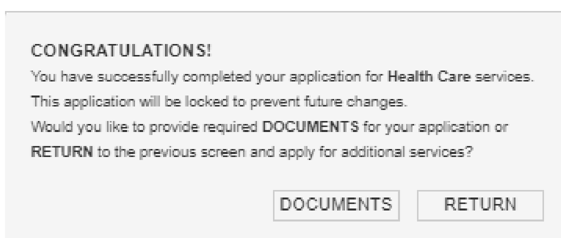
Be sure to provide the Source of Application as it is a requirement for submission.

The Notice of Privacy Practices can be viewed in either English, or Spanish and may be printed by clicking the printer icon.

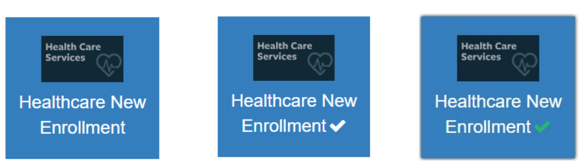
Once everything has been answered, click the SUBMIT button to submit the application.



If there is missing information, an error box will alert you to what needs to be completed.   After you address the required fields and click SUBMIT again, you will receive a message letting you know the application has been successfully submitted. It will give you the option to RETURN or go on to the DOCUMENTS section.



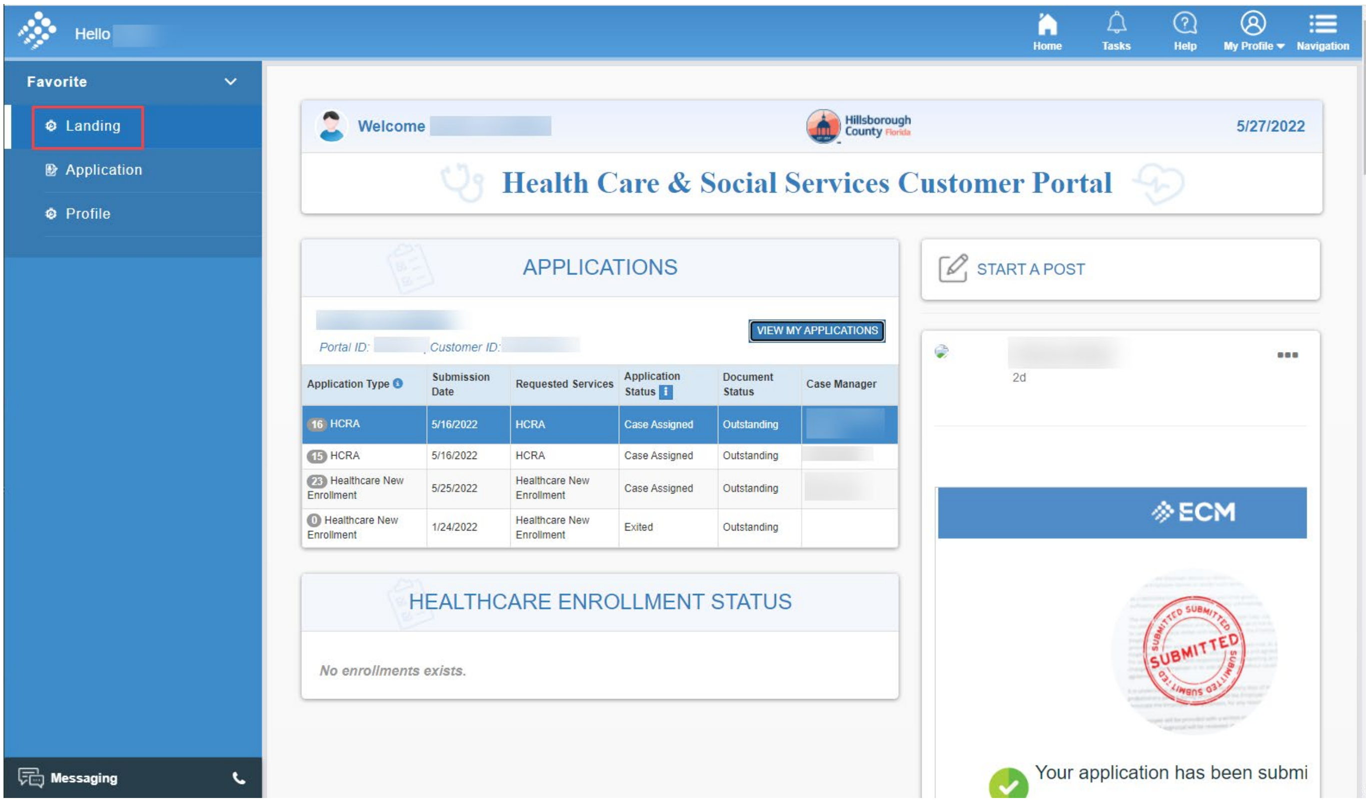
Health Care Button



- If there is no check mark next to the words Health Care New Enrollment, a Health Care application has not been started.
- A white check mark indicates a Health Care application has been started but has not been submitted.
- A green check mark indicates a Health Care application has been submitted.

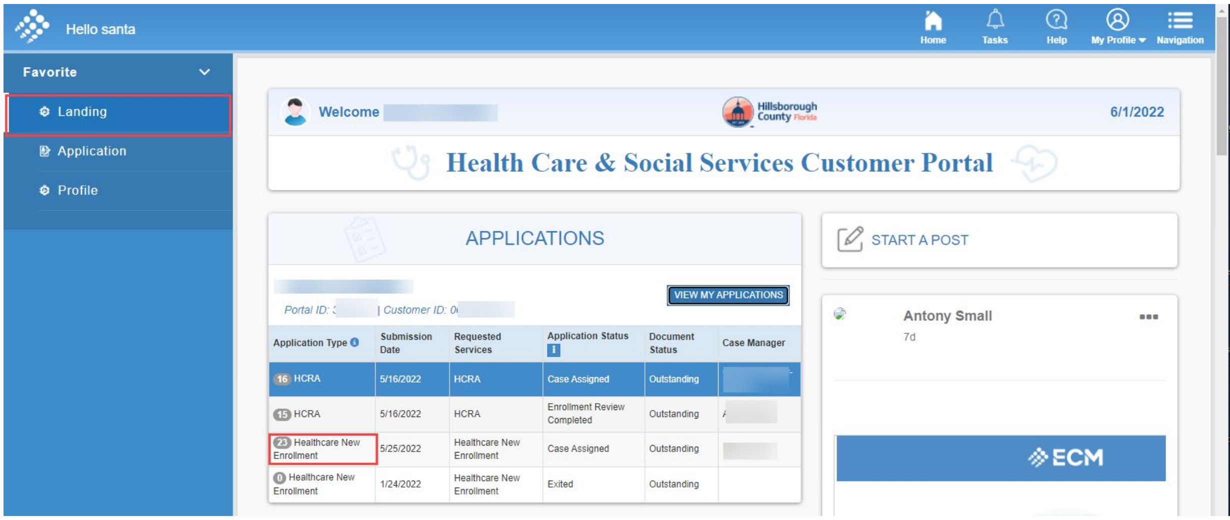
Landing Page

This is the Landing page after clicking CONFIRM on the Profile Confirmation page or after an application has been submitted. Here, you can view your application and see your enrollment status.

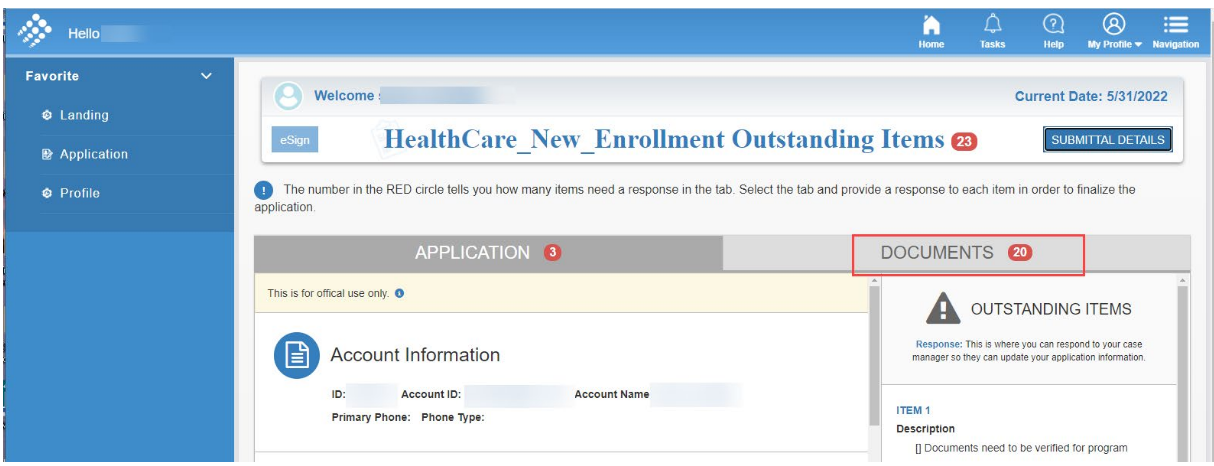


Landing / Applications / Documents

Select the application to review the required documents.

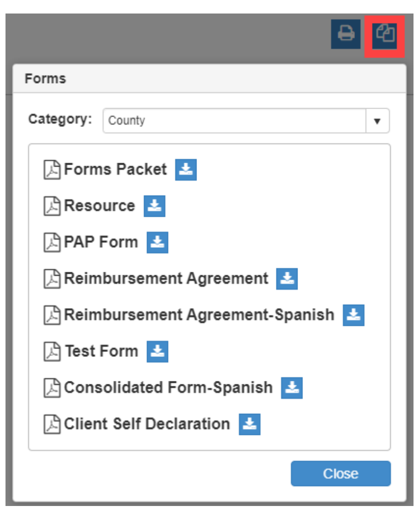


Then, click on the Documents tab.

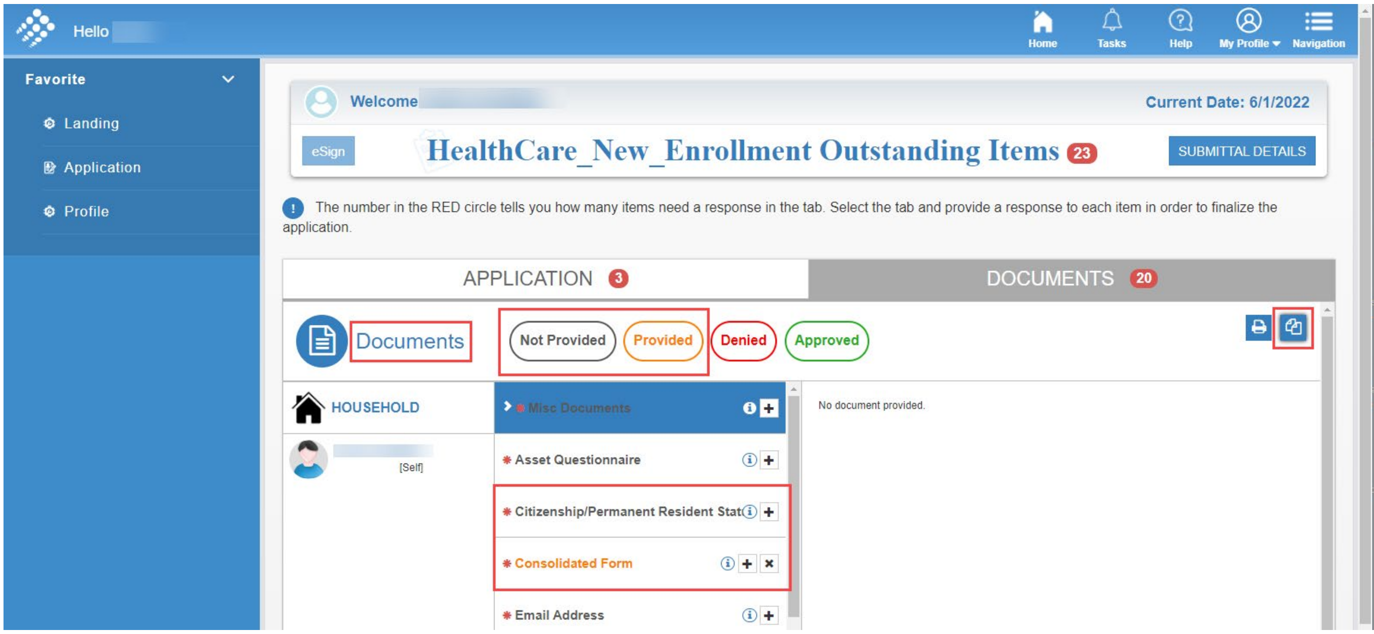


There will be required documents that apply to the household as well as each family member (over the age of 18).

This tab contains a Show Forms  button where you can locate forms to print out, complete, and scan back in.



Documents



The Documents section allows you to see a color-coded status for each document:

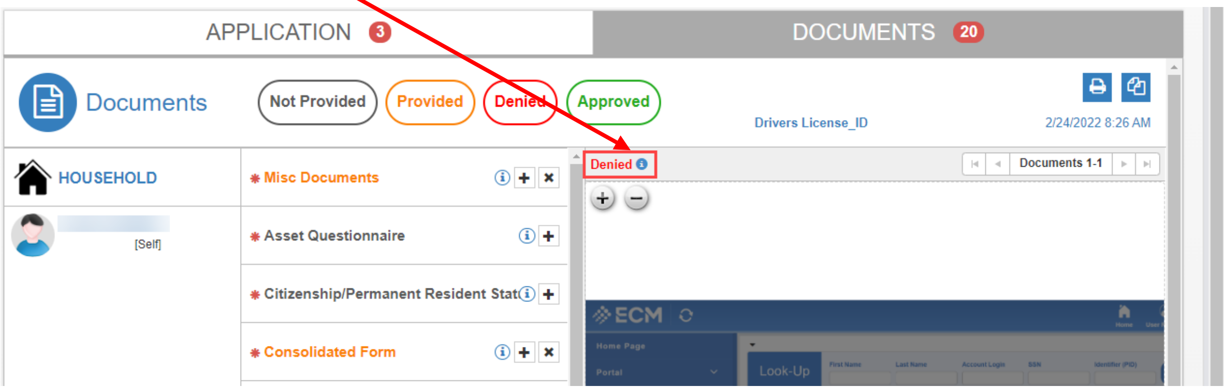
- Black = Not Provided
- Yellow/Amber = Provided
- Red = Denied
- Green = Approved

This is also where required documents can be uploaded. You may upload computer files (.jpgs, .pdfs, etc.), scan in a document or take a picture. When you click the **+** button to upload, you will see your different options.

Document Status

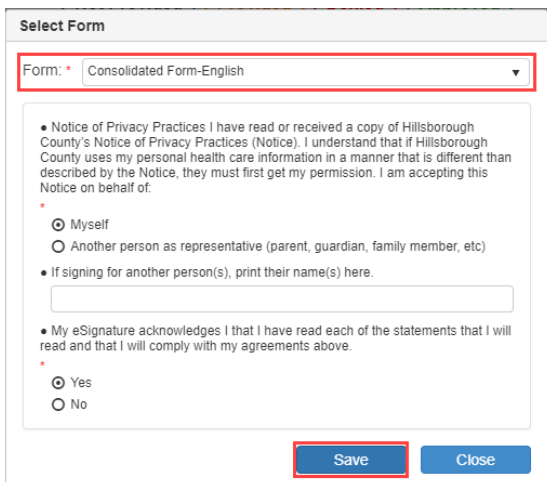
As the Health Care Team works on the applications, they either approve or deny the submitted documents. If a required document has been approved, it will display in green with a check next to it.

Sometimes a document may be denied simply because it is not legible. If a document is denied, you should see the reason by hovering over the icon next to the **Denied** status which is displayed in the grey header over the preview pane.

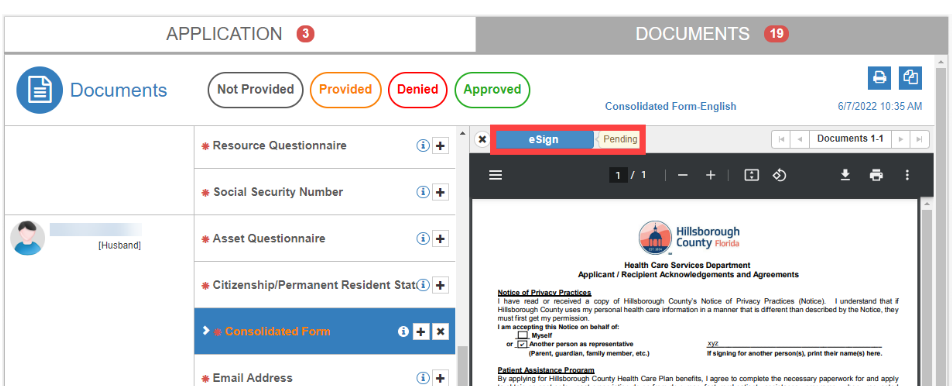


Adding a Form with eSignature

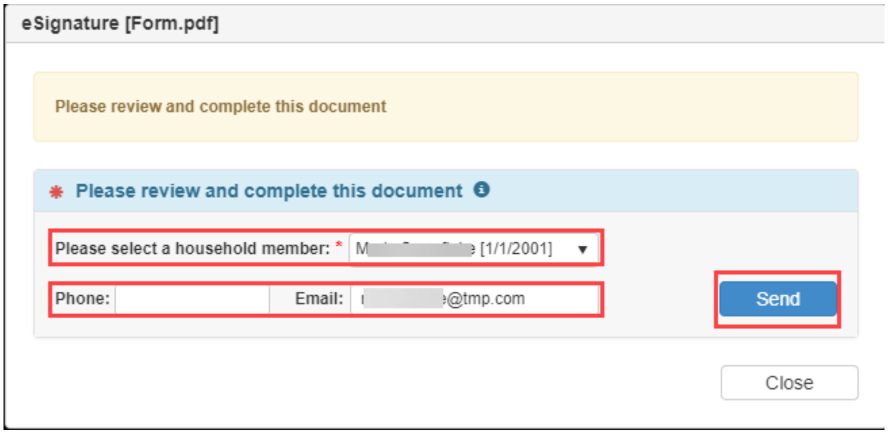
The Consolidated Form, PAP form and Reimbursement Form are examples of forms that can be filled out within the application. To complete these, click the + icon to the right of the form and then click the Add Document pop-up. Use the dropdown to select the preferred language. Answer the questions and click Save.



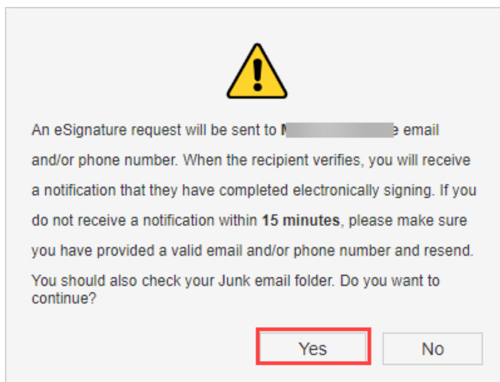
Next, the eSign button will flash above the form being displayed on the right. This form will not be complete until the eSign process has been completed.



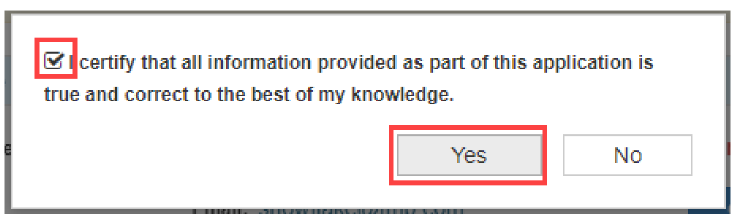
Clicking the eSign button displays the eSignature pop-up. Use the dropdown to select the person who will be signing the form. That will prompt a new area to be used for specifying a phone or email to be used for notifying the person who needs to provide the signature if it is someone other than the applicant. Click Send.



The following message will be displayed showing that the request will be sent. Click Yes if you want to continue to send.



If signing for yourself, your personal information should populate and a pop-up will display. Check the box to certify that the information provided is correct and click Yes.



Now the notice next to eSign should display as Completed.

Uploading Documents to Satisfy Individual Requirements

Here are a few guidelines for document uploads.

1. You may upload the following document types:
    - .jpg
    - .pdf
    - .tif
    - .tiff
2. There is a 10 MB size limit per upload.
3. You may upload a document (typically a .tif or .tiff) that contains **multiple pages**. An example of this is a bank statement that has more than one page but is scanned in as one document/attachment.

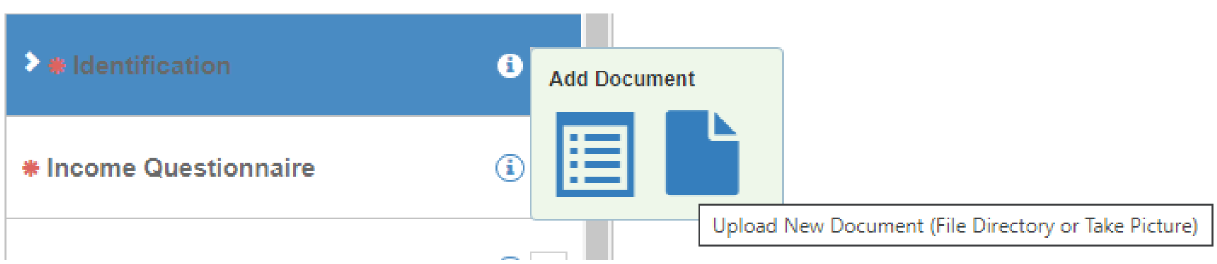
    AND/OR

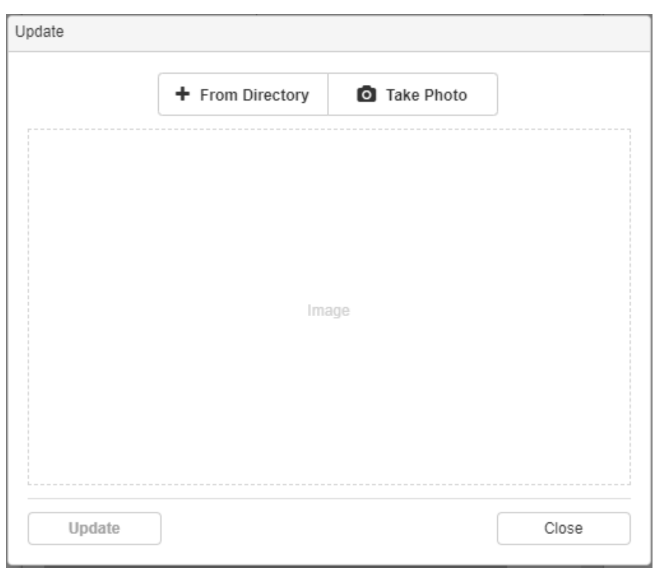
4. You may select **multiple documents** to upload, however, you can only select five at one time. If you have seven documents to attach, you can upload the first five together and then the second two.

To upload documents, click on the **+** button next to the applicable document.

NOTE: If you are using a mobile device for the first time, you will be asked to allow access to the camera or photos. Choose Yes.

An Add Document window will appear where you have the option to select a file from Document Inventory or Upload New Document (File Directory or Take Picture).

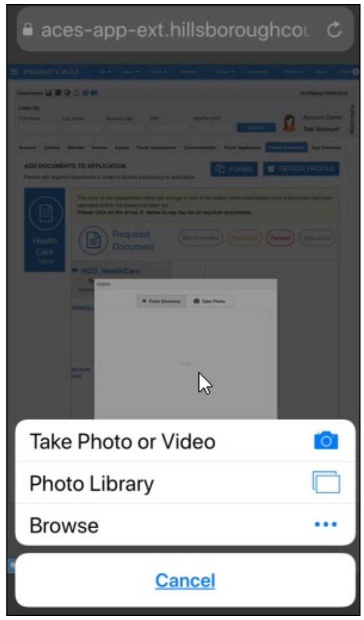




Mobile Device

If you are accessing the Portal from a mobile device:

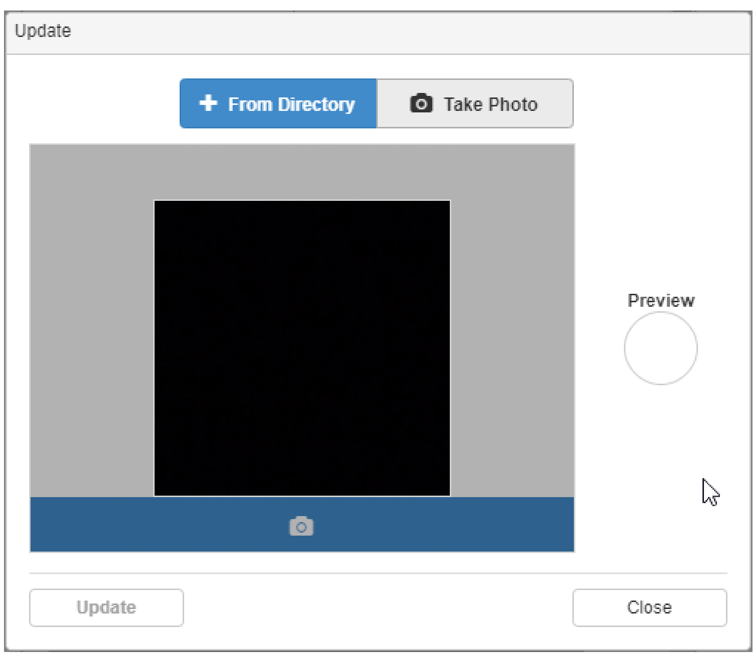
1. Select ‘From Directory’ (not Take Photo)
2. Next, select either ‘Take Photo or Video’ (to take a new photo) or ‘Photo Library’ (to access a photo that already exists on your device.



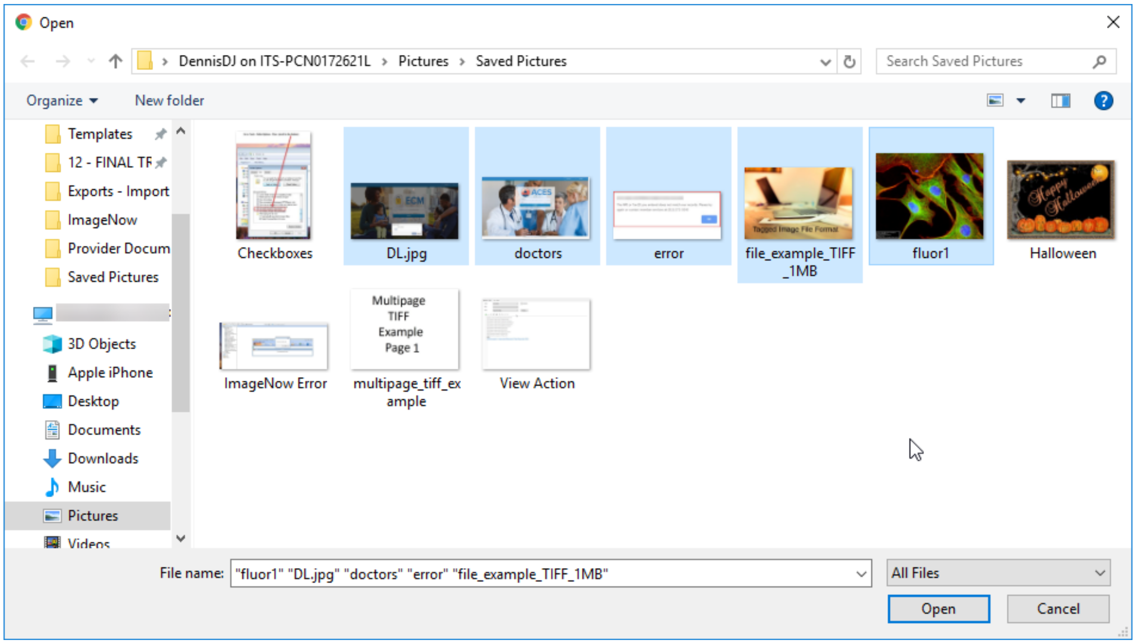
Computer

If you are accessing the Portal from a computer and wish to use its camera:

1. Select ‘Take Photo’
2. Once you have the document in the view, click the camera icon to capture the image.



If you have an existing file on the device you are using, you can select it from the file directory like you would to upload any computer file.

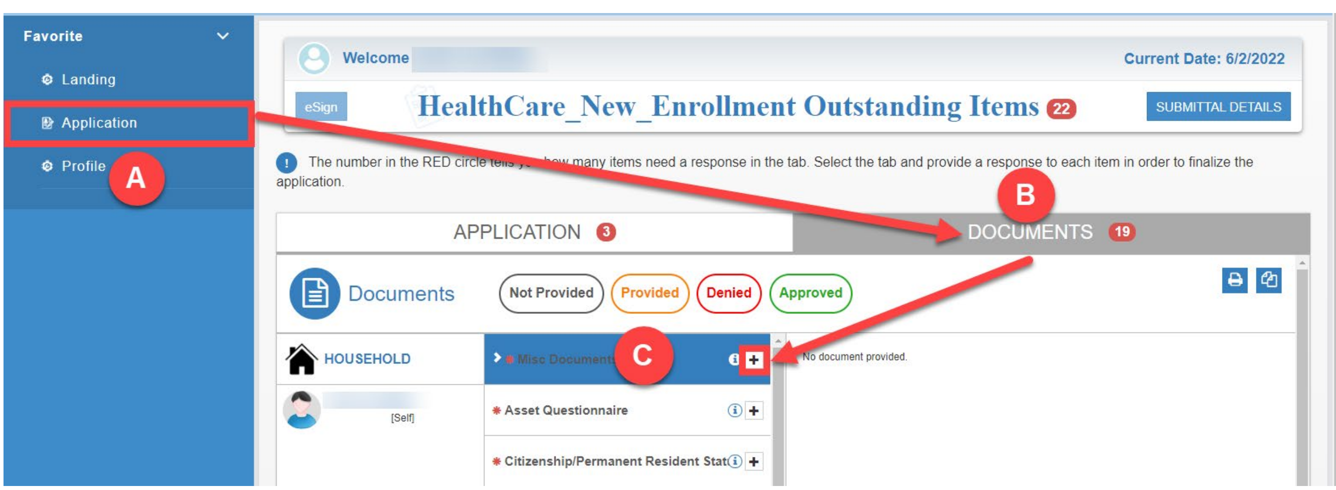


REMEMBER: You may only select up to five documents at once. You can add more than five to one requirement but only up to five at one time.

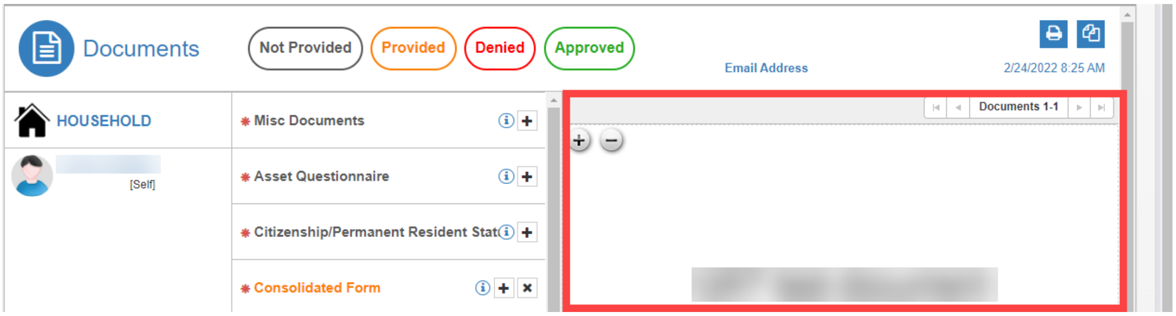
Packet Return – Uploading Documents Not Included in the Required Documents Section

1. Navigate to the Application(A)/Documents section(B). If you are using a PC, you should use Google Chrome as your browser. On a device, you may need to locate the navigation menu at the top.

2. Click on the UPLOAD button (+) (C). This will open the file directory (like mentioned above).

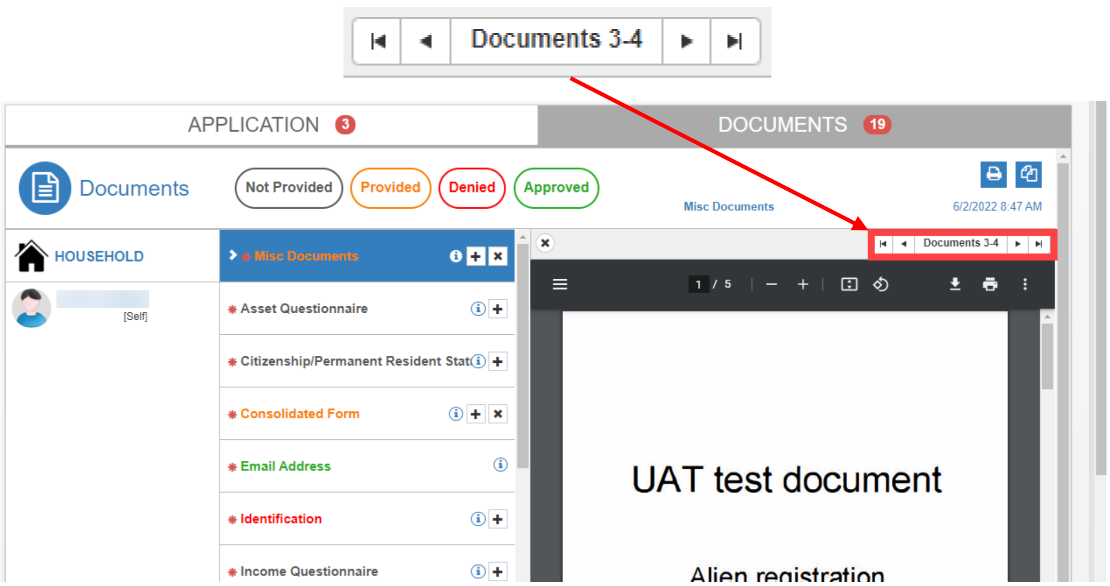


3. You may upload up to five documents at a time.
4. Your document(s) should appear in the window on the right.

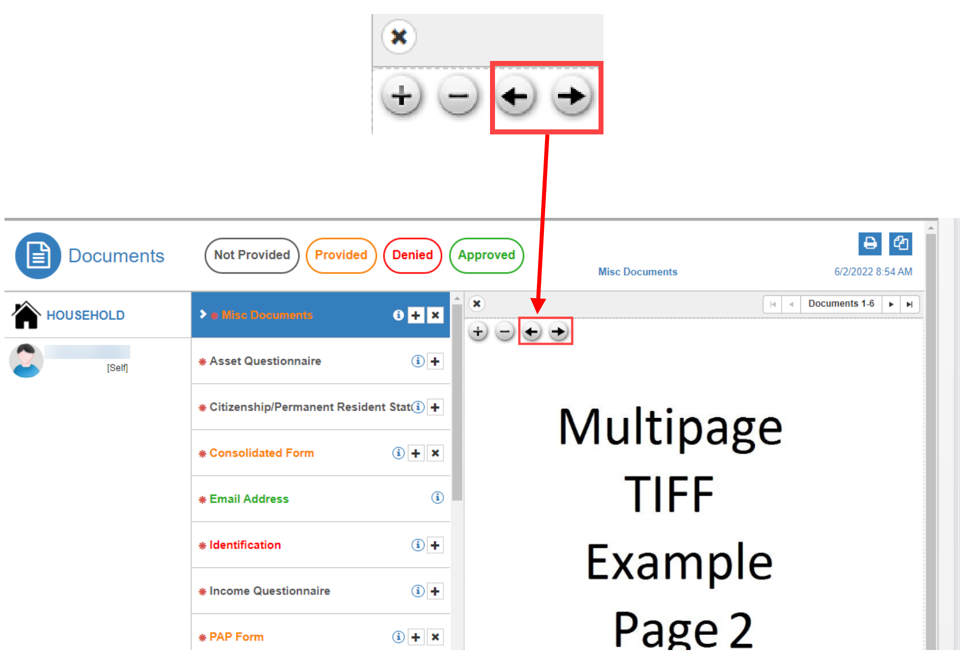


Navigating and Previewing Documents

If you have multiple documents uploaded for one requirement, you can scroll through the individual documents using the navigation arrows found in the top righthand corner of the preview screen.



If you have a multi-page document, you can navigate through its pages using the Next page and Previous page arrows.

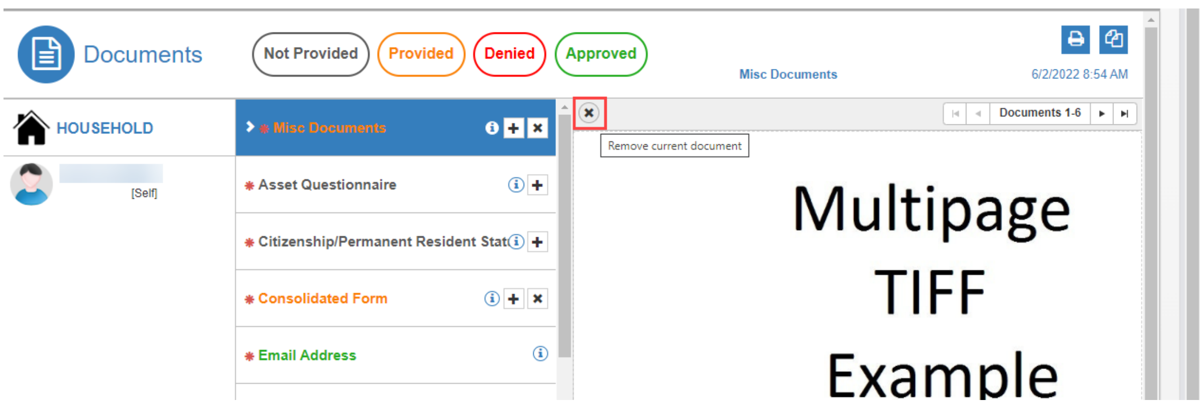


You may also zoom in or zoom out on the document being previewed by clicking the **+** or **–** buttons.

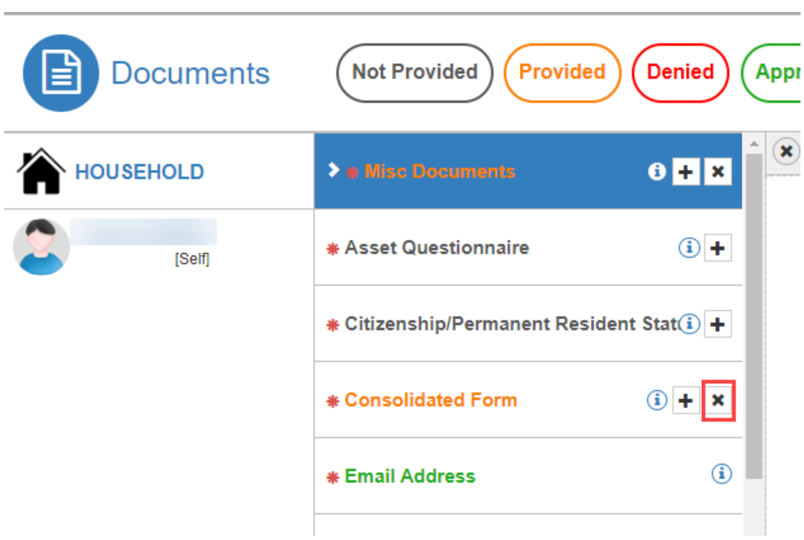
Removing Documents

If you make a mistake and need to remove a document, you may do so before the Document Management team approves or denies the document and "locks" its status. At that point, you will no longer see the **X** icon for removal. If you have multiple documents attached for one requirement, you can either remove all documents or delete individually.

1. To remove an **individual** document:
    - Navigate to the document you wish to delete
    - Click the **X** icon in the top left-hand corner of the preview page to remove the current document.



2. To remove **all** documents from a requirement, click the **X** icon on the right side of the requirement field.

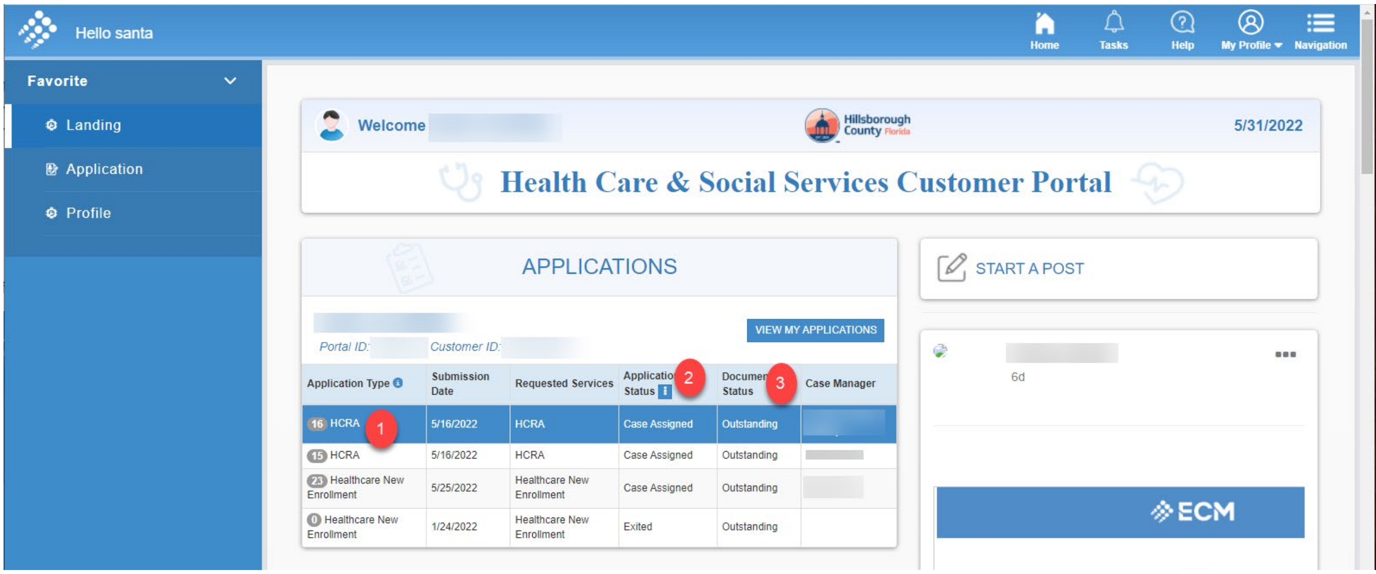


Landing / Application Status

Once the application has been submitted, to determine the status and required information, the Landing Page offers the following statuses:

1. Application Details – Clicking on the Application Type.
2. Application Status - Clicking on the opens the Application.
3. Document Status – This column shows if there are outstanding documents. Refer to the Documents section for uploading required documents.

Note: View My Applications displays more detail for all applications.



The End