



Request and Approve Client Encounter System Access

Identity and Access Management

February, 2021



TEXAS
Health and Human
Services

Request Client Encounter System (CES) Access

Complete the following steps to order CES access.

1. Log-in to the Enterprise Portal using your **Username** and **Password**.
2. Click **Manage Access** to open the **Select Items** screen.

Figure 1. Select Items screen

The screenshot shows the 'Select Items' interface. At the top, it says 'Select up to 15 items.' Below this, there are two sections: 'Existing Access' and 'New Access'. Each section has a search bar. The 'Existing Access' section contains a table with columns 'Access Name', 'Description', and 'Username'. One item is listed: 'EDG' with description 'Enterprise Data Governance' and username '44444444111'. The 'New Access' section contains a table with columns 'Access Name' and 'Description'. Several items are listed, including 'CES' which is selected with a checkmark. Other items include 'CM Admin' and 'CMS'.

Access Name	Description	Username
<input type="checkbox"/> EDG	Enterprise Data Governance	44444444111

Access Name	Description
<input type="checkbox"/> CCGS	CCGS Community Care Case Reading System
<input checked="" type="checkbox"/> CES	Client Encounter System
<input type="checkbox"/> CM Admin	DADS Administrative Tools
<input type="checkbox"/> CMS	CMS Medicare Query

3. Select **CES**.
4. Click **Next** to open the **Review Order** screen.

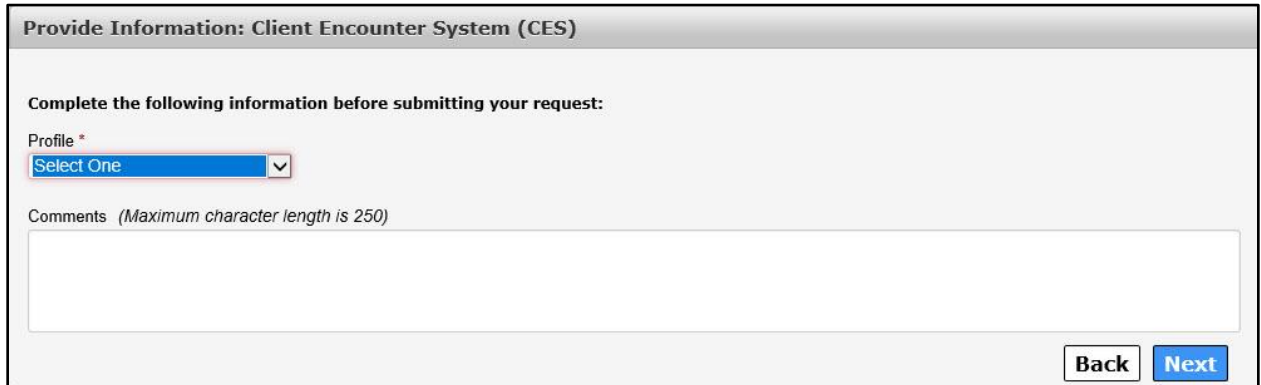
Figure 2. Review Order screen

The screenshot shows the 'Review Order' screen. At the top right, there is an 'Empty Cart' button. Below this is a table with columns: 'Item Name', 'Request Type', 'Submitted For', and 'Status'. One item is listed: 'CES' with 'Request Type' 'New Access', a redacted 'Submitted For' field, and a status of 'Information Required' with a warning icon. At the bottom right, there are two buttons: 'Return To List' and 'Submit Order'.

Item Name	Request Type	Submitted For	Status
CES	New Access	[Redacted]	Information Required

5. Click the **Information Required** link to open the **Provide Information: Client Encounter System (CES)** screen.

Figure 3. Provide Information: Client Encounter System (CES) screen



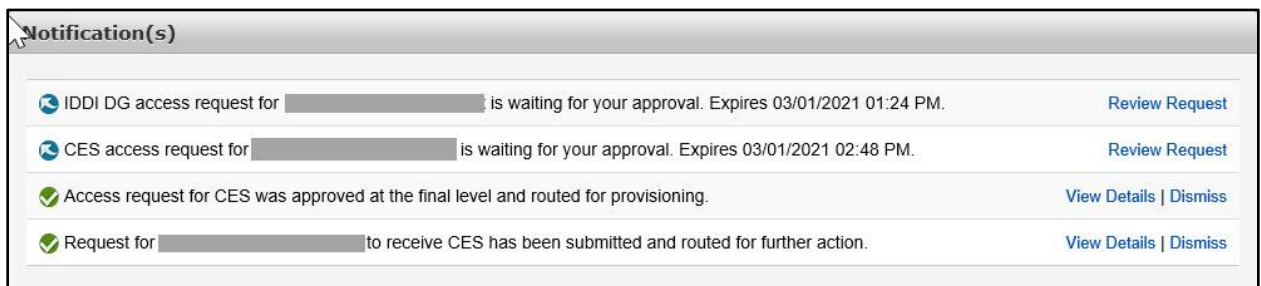
6. Select a **Profile** from the drop-down menu. This is a required field.
7. *Optional:* Enter **Comments** for the approvers as needed.
8. Click **Next** to open the **Review Order** screen.
9. Check the **I understand that by submitting this order I am agreeing that all of the information in each request is true and necessary** check-box.
10. Click **Submit Order**. Your order has been placed and will be forwarded for approval.

First and Second Level Approvers

Complete the following steps to approve a CES request for an employee.

1. Log-in to the HHS Enterprise Portal using your **Username** and **Password**.
2. Click **Notifications** to open the **Notification(s)** screen.

Figure 4. Notification(s) screen



3. Click **Review Request** to open the **Review Request** screen.

Figure 5. Review Request screen

The screenshot shows a 'Review Request' window with the following information:

- Request#**: 6167153514308658196
- System**: CES
- Requested By**: [Redacted]
- Requested For**: [Redacted]
- Request Date**: 02/24/2021
- Request Type**: New Access - CES access request for HHSCEmployeeUser Test is waiting for your approval.
- Profile**: Call Centers Professional (dropdown menu)
- Comments**: (Maximum character length is 250) [Empty text area]
- History**: 02/24/2021 13:48:43: HHSCEmployeeUser Test - [Scrollable list]
- Buttons**: Back, Deny, Approve

4. Verify the request is correct for the individual making it.
5. Click **Approve** to open the **Add Details** window. Details are not required if you are approving the request. Click **Deny** to deny the request. Comments are required if you are denying the request.

Figure 6. Add Details screen

The screenshot shows an 'Add Details' window with the following information:

- Notes**: (*Required only if you deny the request)
- Text Area**: [Empty text area]
- Character Limit**: Maximum character length is 500.
- Buttons**: Close, OK

6. Click **OK**.