



December 13, 2024

California Healthcare Eligibility, Enrollment, and Retention System

This Job Aid is intended for Site Certifiers and illustrates advanced features to view and manage Provider Staff accounts for a Family Planning, Access, Care, and Treatment (Family PACT) site location. The Site Certifier Dashboard displays as the landing page for all Site Certifiers upon successful login. Site Certifiers can add Provider Staff accounts for their site location via the dashboard and manage pending, active, and deactivated Provider Staff accounts. Actions display based on a Provider Staff’s account status. Site Certifiers may take actions such resend or revoke account creation invitations, edit basic account details, and deactivate an account for a Provider Staff.

Site Certifier Dashboard Overview

Site Certifiers access the Site Certifier Dashboard by logging in on the Log in or create an account to find coverage page. Global header links and icons display at the top of the page.

The dashboard displays the following:


- **+ Add Staff Account** button – Navigates the user to Add Staff Account page

The screenshot shows the 'Site Certifier Dashboard' interface. At the top, there is a navigation bar with the HCS logo, Family PACT logo, and links for Client Management, Dashboard, and user profile (KT). A search icon is also present. Below the navigation bar, the main title 'Site Certifier Dashboard' is displayed, along with a '+ Add Staff Account' button. The dashboard is divided into two main sections: 'Site Information' and 'Pending Staff Accounts'. The 'Site Information' section includes details for the provider site (DMart Pharmacy) and its address (101 Creek Park, Rensselar, CA 548745677). The 'Pending Staff Accounts' section features a table with columns for Staff Name, Staff Email, and Added On. Two pending accounts are listed: one for Bell, Jakzon (added 07/13/2024) and one for Mariez, Joseph (added 07/11/2024). A pagination control at the bottom indicates '1-2 of 2 items' and shows page 1 of 1.

STAFF NAME	STAFF EMAIL	ADDED ON
Bell, Jakzon	JakzonBell@mailinator.com	07/13/2024
Mariez, Joseph	josemariez@mailinator.com	07/11/2024

JOB AID: SITE CERTIFIER DASHBOARD

- *Site Information* section
 - *PROVIDER SITE* – Displays the name of the site location where the Site Certifier is registered
 - *ADDRESS* – Displays the address of the site location
 - *LOCATION NPI* – Displays the National Provider Identifier (NPI) number for the site location
- Provider Staff accounts associated with the site location display in three tabs:

 **Site Information**

PROVIDER SITE
DMart Pharmacy

ADDRESS
101 Creek Park, Rensselaer, CA
548745677

LOCATION NPI
7654390102


Pending Active Deactivated

- **Pending** – Displays by default and lists Provider Staff added by a Site Certifier, who have not yet created a Family PACT account
- **Active** – Displays Provider Staff who have created a Family PACT account
- **Deactivated** – Displays Provider Staff with a deactivated Family PACT account

Note: A *No results to display Add staff to get started* message displays when there are no Provider Staff accounts for the tab selected.

Pending Active Deactivated

Pending Staff Accounts

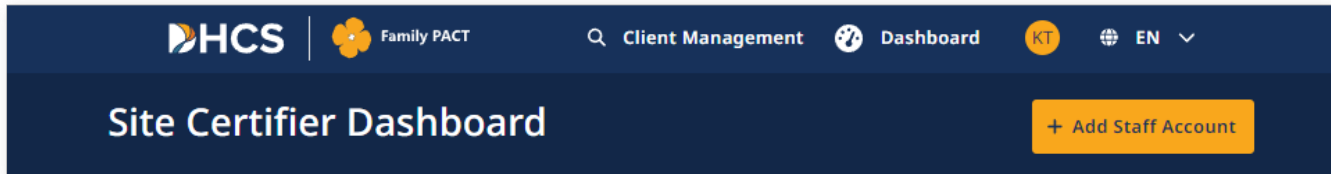


No results to display
Add staff to get started

Add New Provider Staff

The following steps illustrate how a Site Certifier adds a new Provider Staff to their site location.

1. Click the **+ Add Staff Account** button. The *Add Staff Account* page displays.



2. Enter the following required information for the Provider Staff account:

- **First name**
- **Middle name**
- **Last name**
- **Email address**

Note: Required fields are indicated with an asterisk.

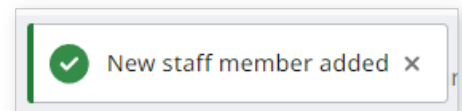
3. Click the **Confirm and send invitation** button. An invitation is sent to the email entered for the Family PACT account.

A screenshot of the 'Add Staff Account' form. On the left, under 'Site Information', there is pre-filled data: PROVIDER SITE (DMart Pharmacy), ADDRESS (101 Creek Park, Rensselaer, CA 548745677), and LOCATION NPI (7654390102). On the right, there are input fields for: * First name, Middle name, * Last name, and * Email address. At the bottom, there are two buttons: 'Confirm and send invitation' and 'Cancel'.

- Clicking the **Cancel** button cancels the action and displays the Dashboard

A *New staff member added* message displays informing the user that the member is successfully added.

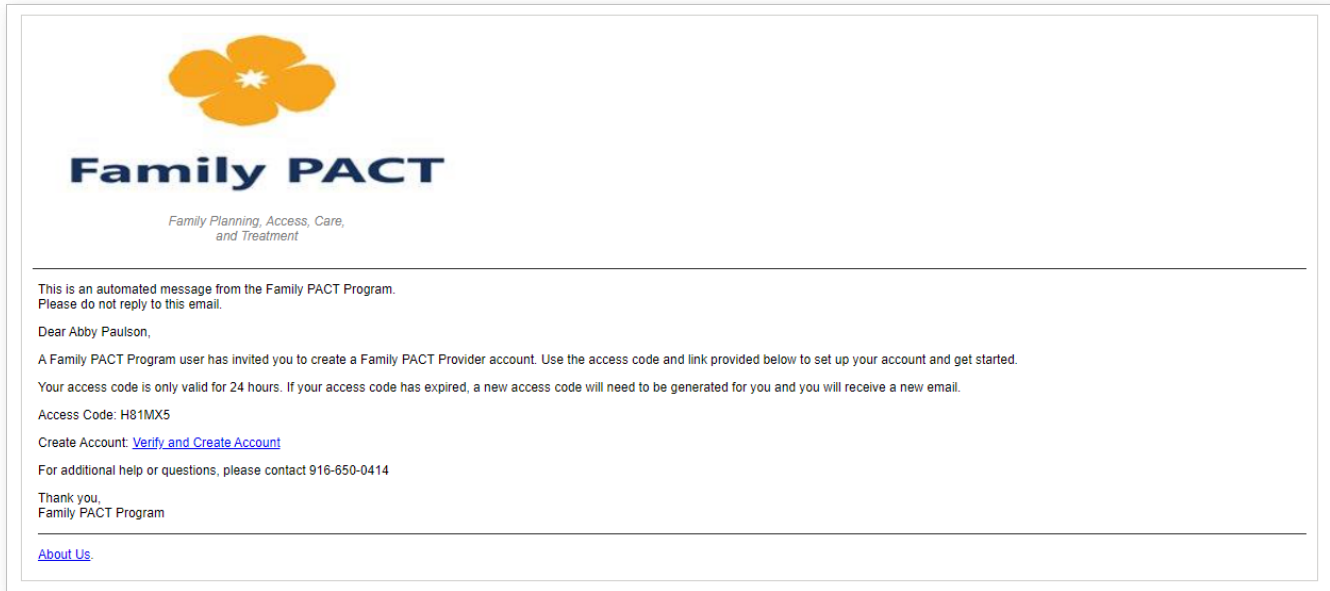
Note: Error messaging displays when information is not entered correctly.



JOB AID: SITE CERTIFIER DASHBOARD

The Provider Staff displays on the **Pending** tab of the *Site Certifier Dashboard*.

Provider Staff receive an email with information needed to create their Family PACT account.



Manage Pending Provider Staff Accounts

Site Certifiers may view and manage pending Provider Staff for their site location on the *Pending Staff Accounts* page. The following displays:

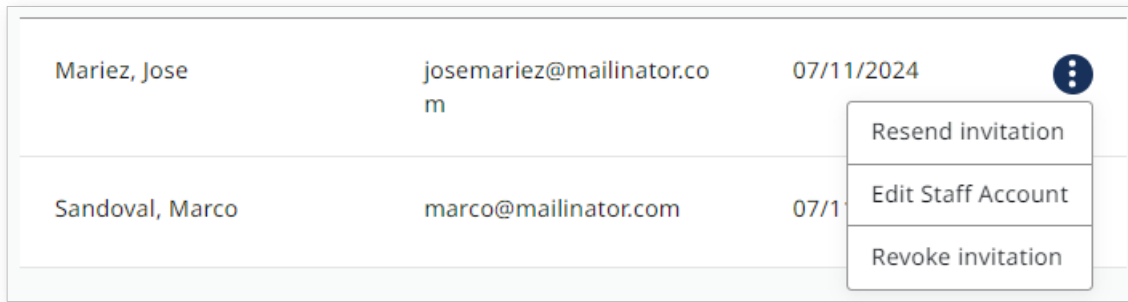
- **STAFF NAME** column – Displays the name of the Provider Staff
 - Clicking the **caret** icon sorts Provider Staff in alphabetical order
- **STAFF EMAIL** column – Displays the Provider Staff's email address
- **ADDED ON** column – Displays the date the Site Certifier added the Provider Staff and the account creation invitation email was sent

Pending	Active	Deactivated
Pending Staff Accounts		
STAFF NAME ▾	STAFF EMAIL	ADDED ON ▾
Mariez, Joseph	josemariez@mailinator.com	07/11/2024
Bell, Jakzon	JakzonBell@mailinator.com	07/13/2024
1-2 of 2 items		< 1 >

- Clicking the **caret** icon sorts Provider Staff from oldest to newest

JOB AID: SITE CERTIFIER DASHBOARD

- Clicking on the **ellipsis** icon next to the Provider Staff displays the following options:



- **Resend invitation** – Resends the account creation invitation to the Provider Staff's email address

Note: A *New invitation sent.* message displays.

- **Edit Staff Account** – Displays the *Edit Staff Account* page with fields to update the pending Provider Staff's *First name, Middle name, Last name, and Email address.*

Clicking the **Confirm and send invitation** button resends the Family PACT account creation invitation email.

Note: A *Changes saved successfully.* message displays.

HCS | Family PACT | Client Management | Dashboard | KT | EN

Site Information

PROVIDER SITE
DMart Pharmacy

ADDRESS
101 Creek Park, Rensselaer, CA
548745677

LOCATION NPI
7654390102

Edit Staff Account

* First name

Middle name

* Last name

* Email address

Confirm and send invitation

Cancel

JOB AID: SITE CERTIFIER DASHBOARD

- **Revoke invitation** – Displays the *Revoke staff invitation?* popup with the staff's first name, last name, and email address allowing the user to review the account information being revoked
 - Clicking the **Revoke invitation** button disables the Provider Staff's individual access code sent in the Family PACT account creation invitation email and closes the popup. The Provider Staff is removed from the **Pending** tab.
 - Clicking the **Cancel** button closes the popup

Revoke staff invitation?

Please confirm you would like to revoke the invitation to create an account for:

Bell, Jakzon
jakzonBell@mailinator.com

Revoke invitation

Cancel

Note: An *Invitation revoked successfully.* message displays when the account is revoked.

- *[#] of [#] items* – Displays *[# of Pending Staff] of [Total number of Staff added to date]*

Pending	Active	Deactivated
<h3>Pending Staff Accounts</h3>		
STAFF NAME ▾	STAFF EMAIL	ADDED ON ▾
Mariez, Joseph	josemariez@mailinator.com	07/11/2024
Bell, Jakzon	JakzonBell@mailinator.com	07/13/2024

1-2 of 2 items

< **1** >

Note: Up to 25 Provider Staff accounts display on a page at one time

- Pagination arrows display at the bottom of the page when there are more than 25 pending accounts to display. Clicking the left or right arrow displays the next or previous page

1-25 of 26 items	< 1 2 >
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Manage Active Provider Staff Accounts

Site Certifiers may view and manage active Provider Staff for their site location on the **Active Staff Accounts** page. The following columns display:

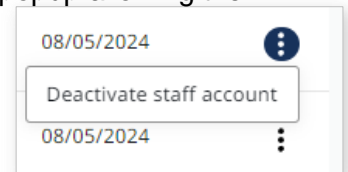
- **STAFF NAME**
 - Clicking the **caret** icon sorts in alphabetical order
- **STAFF EMAIL**
- **ADDED ON** – The date the Provider Staff is added
 - Clicking the **caret** icon sorts from oldest to newest

Pending	Active	Deactivated
Active Staff Accounts		
STAFF NAME ▾	STAFF EMAIL	ADDED ON ▾
Larson, Liz	lizlarson@mailinator.com	08/05/2024
Link, Vivian	vlink@mailinator.com	08/05/2024
Thompson, TJ	tjthompson@mailinator.com	08/05/2024

1-3 of 3 items < 1 >

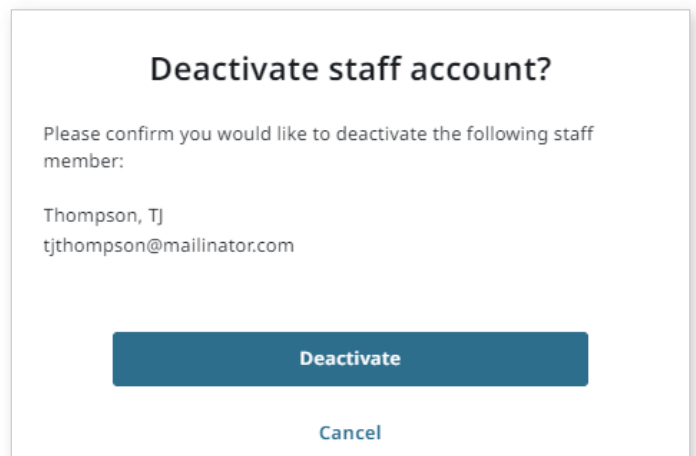
- Clicking the **ellipsis** icon next to the Provider Staff displays the following options:

- **Deactivate staff account** – Displays the *Deactivate staff account?* popup allowing the user to review the account to be deactivated
 - Clicking the **Deactivate** button deactivates the Provider Staff account and closes the popup



Note: Deactivating a Provider Staff account removes the email from the account allowing the Provider Staff's email to be reused during a new account creation.

- Clicking the **Cancel** button closes the popup and cancels the deactivation process



View Deactivated Provider Staff Accounts

Site Certifiers may view deactivated Staff Accounts on the *Deactivated Staff Accounts* page which displays the following:

- Use the *Add Staff* feature if you want to reactivate a staff member who was previously deactivated. messaging
- **STAFF NAME** – Displays the name of the Provider Staff
 - Clicking the **caret** icon sorts in alphabetical order
- **STAFF EMAIL**– Displays a dash (–). As noted above, deactivating a Staff account removes the email from the account
- **ACTIVE PERIOD** – Displays the active start and end date of an account
 - Clicking the **caret** icon sorts from oldest to newest

The screenshot shows a web interface for 'Deactivated Staff Accounts'. At the top, there are three tabs: 'Pending', 'Active', and 'Deactivated', with 'Deactivated' selected. Below the tabs is the title 'Deactivated Staff Accounts' and a sub-header: 'Use the Add Staff feature if you want to reactivate a staff member who was previously deactivated.' The main content is a table with three columns: 'STAFF NAME', 'STAFF EMAIL', and 'ACTIVE PERIOD'. The table contains two rows of data. At the bottom, there is a pagination indicator '1-2 of 2 items' and a page number '1' in a blue box with left and right navigation arrows.

STAFF NAME	STAFF EMAIL	ACTIVE PERIOD
Ramar, krishbgt	-	07/09/2024-08/05/2024
Paulson, Abby	-	07/13/2024-07/13/2024