



California Healthcare Eligibility,
Enrollment, and Retention System



JOB AID: ACCOUNT SETTINGS

December 13, 2024

This Job Aid illustrates the account settings functionality for Family Planning, Access, Care, and Treatment (Family PACT). Account Settings is available to all users who have a Family PACT account, including:

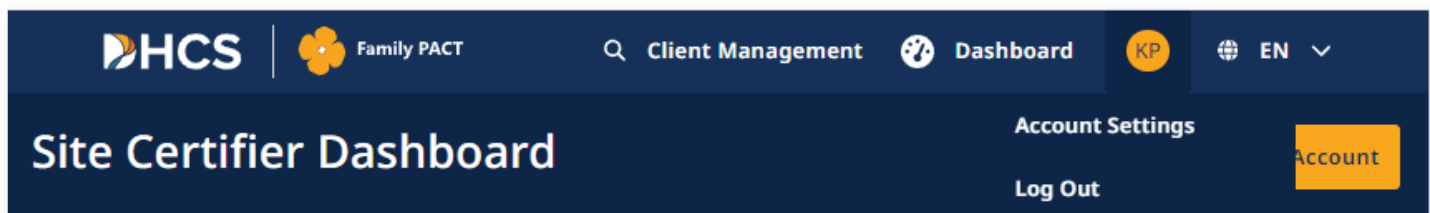
- Clients
- Provider Staff
- Service Center Representatives (SCRs)
- Site Certifiers
- Super Admin

The following features allow users to change their password and security information. Users may also update their personal details such as first and last name:

- Personal Details
- Login Information
- Security Preferences

Navigating to Account Settings

Users may access the account settings by clicking the **Profile** icon (orange circle with user initials) on the header. Clicking the **Account Settings** link displays the *Personal Details* page.



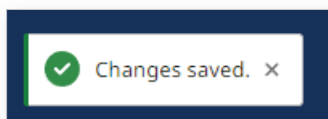
Personal Details

The *Personal Details* page displays the **Account Settings** section in the left navigation panel. Clicking the **Account Settings** caret collapses/expands the section and displays the following three section links: **Personal Details**, **Login Information**, and **Security Preferences**. Users can quickly navigate to the section or page by clicking the link for that page.

The *Personal Details* page displays with user information entered during account creation. Users may update the following fields:

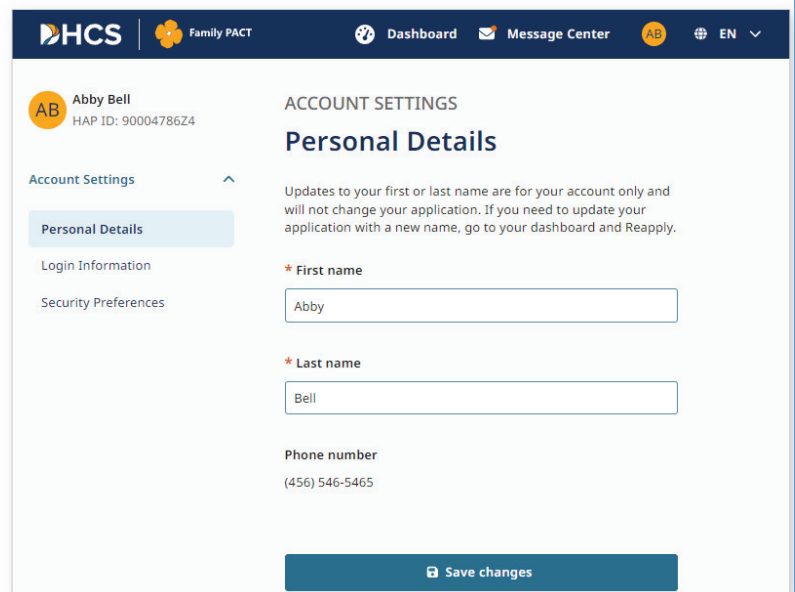
- **First name**
- **Last name**

Clicking the **Save changes** button confirms the changes and displays a *Changes saved.* message in the bottom left of the page

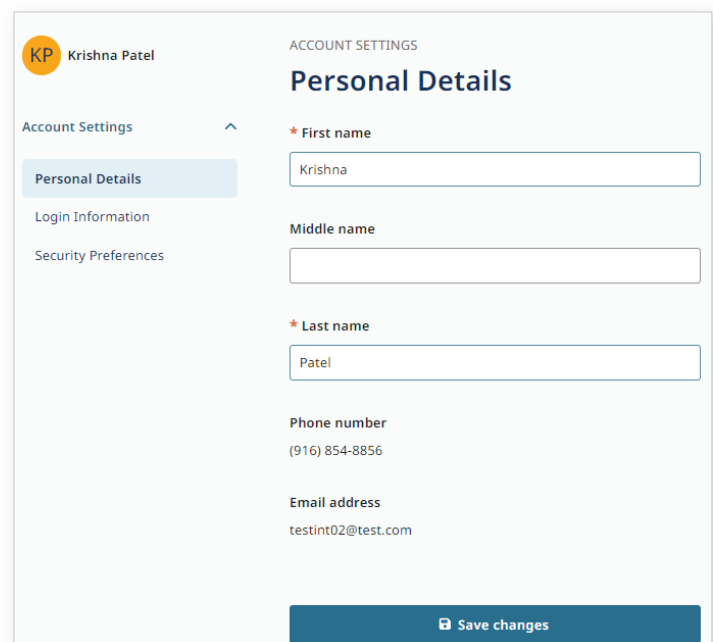


Note: *Phone number* and *Email Address* fields display when applicable and are not editable on this page.

A **Middle name** field displays only for Super Admin, SCR Admin, Site Certifiers, and Provider Staff.



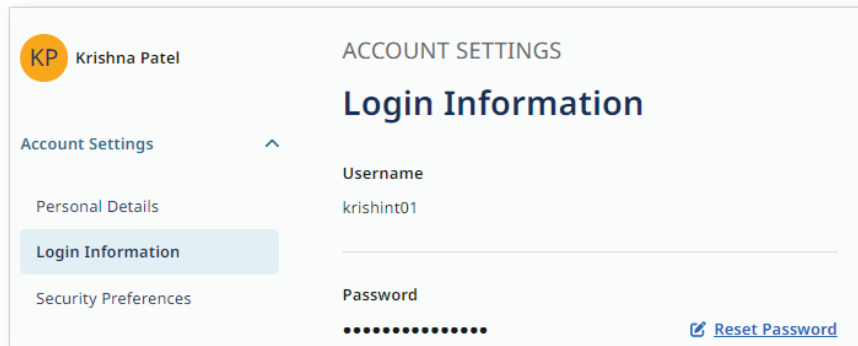
The screenshot shows the 'ACCOUNT SETTINGS' page for Abby Bell (HAP ID: 90004786Z4). The 'Personal Details' section is active. It includes a message: 'Updates to your first or last name are for your account only and will not change your application. If you need to update your application with a new name, go to your dashboard and Reapply.' The form fields are: First name (Abby), Last name (Bell), and Phone number ((456) 546-5465). A 'Save changes' button is located at the bottom right.



The screenshot shows the 'ACCOUNT SETTINGS' page for Krishna Patel. The 'Personal Details' section is active. It includes fields for: First name (Krishna), Middle name (empty), Last name (Patel), Phone number ((916) 854-8856), and Email address (testint02@test.com). A 'Save changes' button is located at the bottom right.

Changing a Password

Users may change their current password by clicking the **Login Information** link in the *Account Settings* section. The *Login Information* page displays with the user's *Username* and masked *Password*. This page allows the user to change/reset the current password.



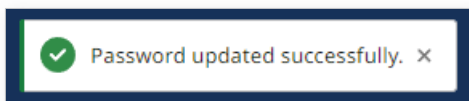
The screenshot shows the 'ACCOUNT SETTINGS' page for Krishna Patel. The 'Login Information' section is active, displaying the username 'krishint01' and a masked password. A 'Reset Password' link is visible at the bottom right of the section.

- Clicking the **Reset Password** link displays the *Reset Password* page.

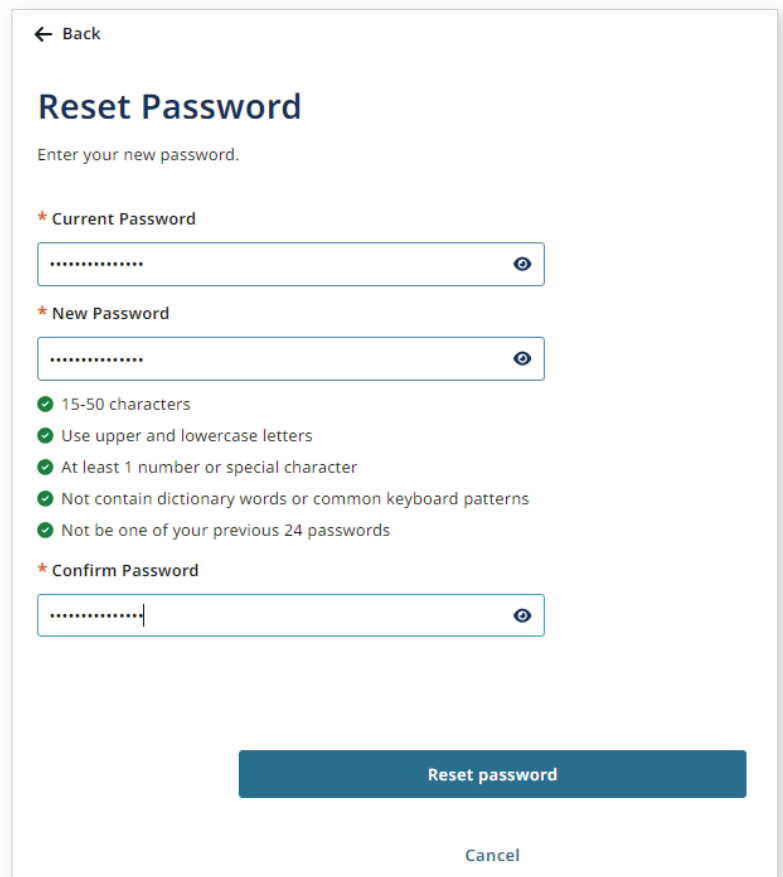
On the *Reset Password* page the user enters the current and new password. As each password rule is met, the color of the text changes to green and a check mark displays next to the rule indicating the criteria has been met.

The **Reset password** button enables when the **New Password** and **Confirm Password** field entries match.

- Clicking the **Reset password** button confirms the new password and displays the message *Password updated successfully.* message



- Clicking the **Back** link or the **Cancel** button discards changes and closes the *Reset Password* page

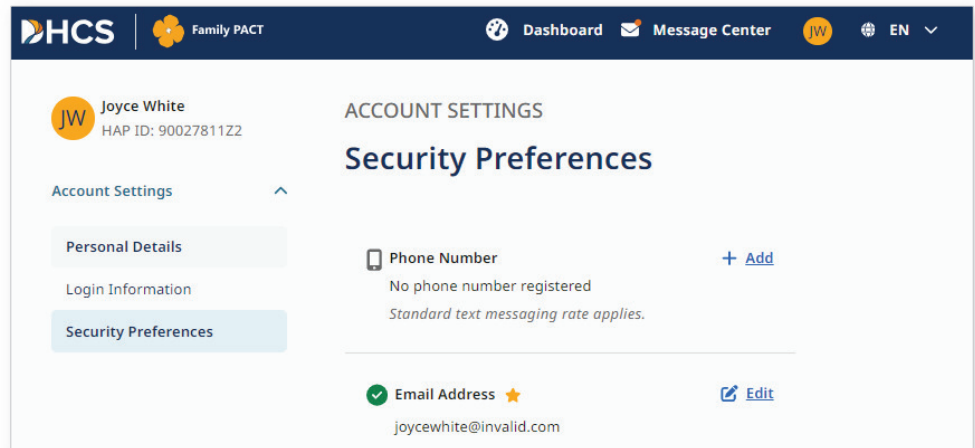


The 'Reset Password' page has a 'Back' link at the top left. Below the title, it says 'Enter your new password.' There are three password input fields: 'Current Password', 'New Password', and 'Confirm Password'. Below the 'New Password' field, there are five password rules, each with a green checkmark: '15-50 characters', 'Use upper and lowercase letters', 'At least 1 number or special character', 'Not contain dictionary words or common keyboard patterns', and 'Not be one of your previous 24 passwords'. At the bottom, there is a 'Reset password' button and a 'Cancel' link.

Updating Verification Methods and Security Preferences

Users may also update the current security preferences. Clicking the **Security Preferences** link in the *Account Settings* section displays the *Security Preferences* page. The user may add, remove, or edit the contact or verification method(s):

- The **+ Add** link displays next to the security preference when the method has not been registered
- The **Edit** link displays next to security preference when the method has been registered



Adding a *Security Preference* otherwise known as a verification method:

- Clicking the **+ Add** link next to the *Phone Number* displays the *Register Your Phone Number* page
 - Entering a phone number and clicking the **Send code** button sends a verify code to the phone number entered and displays the *Verify Your Phone* page

A screenshot of the 'Register Your Phone Number' page. It features a back arrow, a title, and a brief instruction: 'We will send a One-Time passcode to verify your phone number. Once the phone number is confirmed, it will be added to your verification methods.' Below this is a text input field labeled '* Phone number' containing '(456) 464-6545'. At the bottom is a blue 'Send code' button.A screenshot of the 'Verify Your Phone' page. It features a back arrow, a title, and a prompt: 'Enter the 6-digit code sent to your phone number: (•••) ••••-3636'. Below this is a numeric keypad with buttons for 2, 1, 4, 5, 4, and 8. A link for 'Resend code' is provided. At the bottom is a blue 'Verify code' button.

- Clicking the **+ Add** link next to an unregistered email displays the *Register Your Email Address* page
- Entering an email and clicking the **Send code** button sends the verify code to the email provided

A screenshot of the 'Register Your Email Address' page. It features a back arrow, a title, and a brief instruction: 'We will send a One-Time Passcode to verify your email address. Once the email address is confirmed, it will be added to your verification methods.' Below this is a text input field labeled '* Email address'. At the bottom is a blue 'Send code' button.

Editing a *Security Preference* otherwise known as a verification method:

- Clicking the **Edit** link next to a registered phone number displays the *Edit Your Registered Phone Number* page
 - Entering a new phone number and clicking the **Send code** sends a verify code to the phone number entered

The screenshot shows the 'ACCOUNT SETTINGS' page for Penny White. The 'Security Preferences' section is highlighted. It lists two verification methods: 'Phone Number' (564) 655-5565 and 'Email Address' (pennywhite@mailinator.com). Both have 'Edit' and 'Remove' links. A 'Change preferred verification method' button is at the bottom.

The screenshot shows the 'Edit Your Registered Phone Number' page. It includes a 'Back' link, a title, and a message: 'We will send a One-Time passcode to verify your phone number. Once the phone number is confirmed, it will be added to your verification methods.' There is a text input field for the phone number containing '(564) 655-5565' and a 'Send code' button.

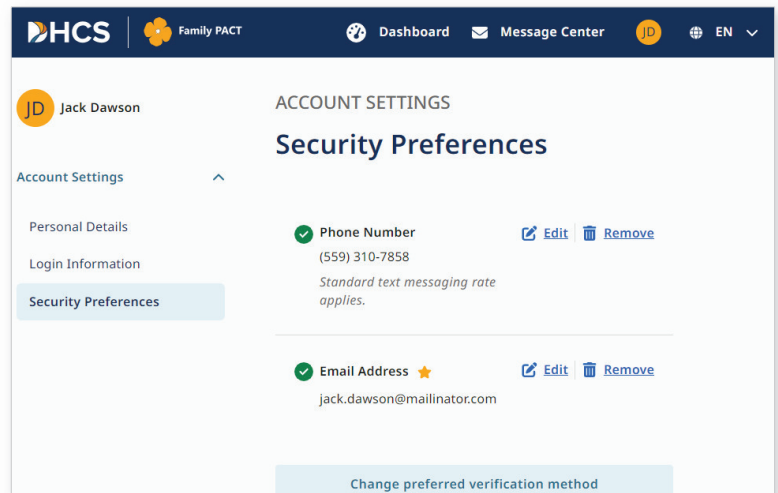
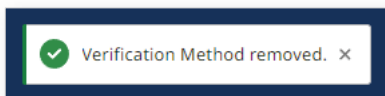
- Clicking the **Edit** link next to a registered email displays the *Edit Your Registered Email Address* page
 - Entering a new email and clicking the **Send code** button sends an email to the email address provided. The *Family PACT One Time Passcode* email includes the code to verify the email

The screenshot shows the 'Edit Your Registered Email Address' page. It includes a 'Back' link, a title, and a message: 'We will send a One-Time passcode to verify your email address. Once the email address is confirmed, it will be added to your verification methods.' There is a text input field for the email address containing 'marcom@mailinator.com' and a 'Send code' button.

JOB AID: ACCOUNT SETTINGS

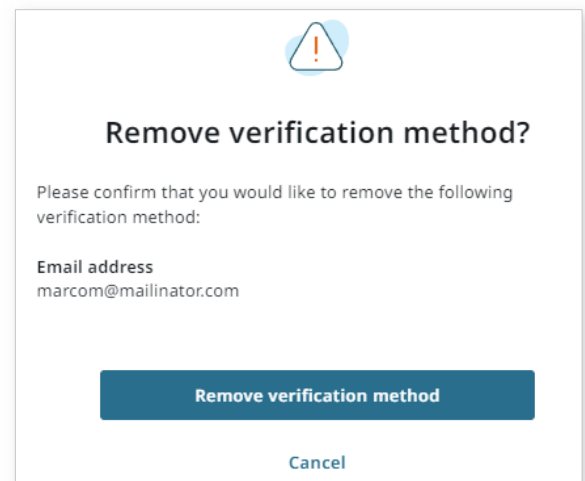
- The **Remove** link displays next to a registered verification method. Clicking *Remove* link displays the *Remove verification method?* popup

- Clicking the **Remove verification method** button removes the verification method from the user's account and displays the message *Verification Method removed*.



- Clicking the **Cancel** button closes the popup

Note: The **Remove** link displays when a user has added both *Phone Number* and *Email Address* verification methods as at least one is required.



The **Change preferred verification method** button also displays when both verification methods have been registered. Clicking the **Change preferred verification method** button displays the *Change preferred verification method* page allowing the user to select the preferred verification method.

- Selecting the preferred verification method and the **Save Changes** button, updates the preferred verification method
- Clicking the **Cancel** button closes the popup

