



JOB AID: SITE CERTIFIER AND PROVIDER STAFF ACCOUNT CREATION

California Healthcare Eligibility,
Enrollment, and Retention System

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This Job Aid is intended for Site Certifiers and Provider Staff and illustrates how to complete the Family Planning, Access, Care, and Treatment (Family PACT) account creation process.

Confirming Site Access

Site Certifiers and Provider Staff receive a Family PACT invitation email with the Subject: *Create Your Family PACT Account – Action Needed*. The invitation email is created for Site Certifiers when the Super Admin adds a site certifier to a Site location. Similarly, the invitation email is created for Provider Staff when the Site Certifier adds a Staff to the site location. This invitation email includes an access code and a **Verify and Create Account** link for the user to create their account. Clicking the **Verify and Create Account** link in the email navigates the user to the *Confirm Site Access* page.

The *Confirm Site Access* page displays for Site Certifiers and Provider Staff to begin creating an account.

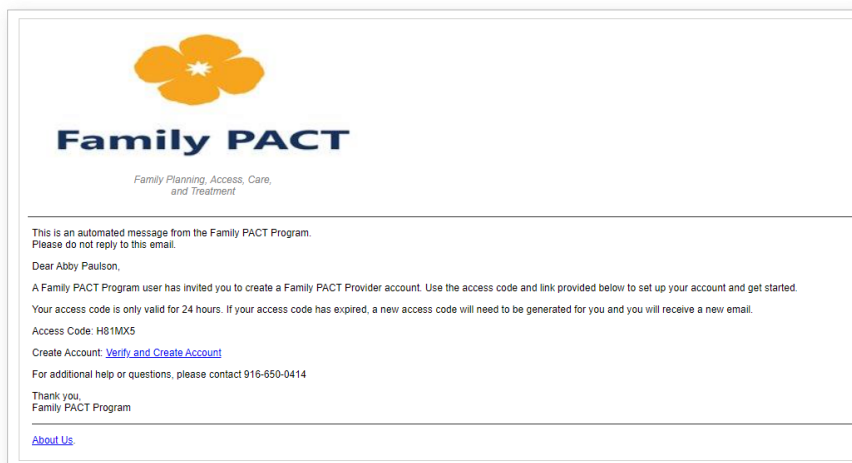
- Entering the access code, included in the email, in the **Access code** field is required.

Note: Error messaging displays when the access code is not entered correctly or expired. Access codes expire after 24 hours.

- Entering the National Provider Identifier (NPI) location number in the **Location NPI** field is also required.

Note: Error messaging displays when the **Location NPI** is invalid or does not match the access code.

- Clicking the **Next step** button navigates:
 - Site Certifiers to the *Site Certifier Account* page
 - Provider Staff to the *Provider Staff Account* page



Site Certifier Account Creation

The *Site Certifier Account* page displays the following pre-populated information entered as part of the initial account creation process:

- *Site Information:*
 - *PROVIDER SITE*
 - *ADDRESS*
 - *LOCATION NPI*
- *Provider Information:*
 - *First name*
 - *Middle name*
 - *Last name*
 - *Email address*

Site Certifiers are required to complete the Account Setup process to be able to log in to Family PACT. The following steps illustrate the process:

1. Enter the professional license number the Site Certifier is affiliated with in the **Professional license number** field.
2. Enter a date in the **Date of birth** field or click the **calendar** icon to display a calendar for date selection.
3. Complete the following fields in the *Account Setup* section:
 - **Username**
 - **Password**
 - **Confirm Password**
4. Click the **Next step** button on the *Site Certifier Account* page. The *Review Your Information* page displays allowing the user to confirm the Site Certifier's information.
 - Clicking the **Edit** link allows the user to edit the information before creating the account

The screenshot shows a web form titled "Site Certifier Account" with two main sections: "Site Information" and "Provider Information".

Site Information:

- PROVIDER SITE: System Testing Clinic
- ADDRESS: Address One, Sacramento, CA 958140001
- LOCATION NPI: 9876543218

Provider Information:

Enter your details below to complete account creation.

First name	Middle name
Abby	
Last name	Email address
Thompson	abbythompson@mailinator.com

* Professional license number

Enter the professional license number given to you by the certified medical board you are affiliated with.

* Date of birth

Account Setup

* Username

* Password

* Confirm Password

Next step →

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- Click the **Create account** button on the *Review your Information* page. The *Verify Your Email* page displays.

The Site Certifier receives an email with the a *One-Time Temporary Passcode/Verify code*, also known as an OTP, to verify their account on the *Verify Your Email* page.

- Enter the OTP on the *Verify Your Email* page.
 - Clicking the **Resend code** link sends a new OTP
- Click the **Verify code** button. The *Log in or create an account to find coverage* page displays.

An *Account Creation successful. Enter your username and password to log in.* message displays on the bottom of the *Log in or create an account to find coverage* page confirming the account creation was successful.

Site Information

PROVIDER SITE
DMart Pharmacy

ADDRESS
101 Creek Park, Rensselaer, CA
548745677

LOCATION NPI
7654390102

Review Your Information

User Information [Edit](#)

First name: Abby

Middle name:

Last name: Paulson

Email address: abbypaulson@mailinator.com

Professional license number:

Date of birth: 08/08/1988

Username: abbypaulson

Password: *****

Create account

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Verify Your Email

Enter the 6-digit code sent to your email address: a*****@mailinator.com

Didn't get the code yet?
[Resend code](#)

Verify code

Log in or create an account to find coverage

Username [Forgot username?](#)

Password [Forgot password?](#)

Log in ->

OR


[Create an account](#)

Account Creation successful. Enter your username and password to log in. X

JOB AID: SITE CERTIFIER AND PROVIDER ACCOUNT CREATION


Enter the 6-digit code sent to your email address: d●●●●●●@mailinator.com

2 3 4 2 3 4

 The passcode you entered does not match what is on file. Please try again.

Note: Error messaging displays when the passcode entered does not match the passcode on file.

- Clicking the **Verify code** button after five incorrect OTP attempts displays the *Account Creation Failed* popup with messaging indicating the Site Certifier's account creation failed
 - Clicking the **Ok** button closes the popup and navigates the user to the *Confirm Site Access* page to restart the account setup process



Account Creation Failed

We were not able to create your account because we could not verify your email address. Make sure your email address is correct and try to create your account again.

Ok

Provider Staff Account Creation

Similar to the Site Certifier steps described above, clicking the **Next step** button on the *Confirm Site Access* page navigates Provider Staff to the *Provider Staff Account* page.

Confirm Site Access

Enter the access code from your invitation and your location NPI to continue.

* Access code

* Location NPI

Next step →

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The *Provider Staff Account* page displays with the following pre-populated information entered by the site certifier:

- *Site Information:*
 - *PROVIDER SITE*
 - *ADDRESS*
 - *LOCATION NPI*
- *Provider Information:*
 - *First name*
 - *Middle name*
 - *Last name*
 - *Email address*

Provider Staff are required to complete the Account Setup process to be able to log in to Family PACT. The following steps illustrate the process:

1. Enter the **Professional license number**, which is optional for Provider Staff.
2. Enter a date in the **Date of birth** field or click the **calendar** icon to display a calendar for date selection.
3. Complete the following fields in the *Account Setup* section:
 - **Username**
 - **Password**
 - **Confirm Password**
4. Click the **Next step** button on the *Provider Staff Account* page. The *Review Your Information* page displays allowing Provider Staff to confirm their information before creating the account.
 - Clicking the **Edit** link allows the user to edit the information before creating the account

Site Information

PROVIDER SITE
DMart Pharmacy

ADDRESS
101 Creek Park, Rensselaer, CA
548745677

LOCATION NPI
7654390102

Provider Staff Account

Enter your details below to complete account creation.

Provider Information

First name: Mary
Middle name:
Last name: Martin
Email address: mary.martin@mailinator.com

Professional license number:

Enter the professional license number given to you by the certified medical board you are affiliated with.

* Date of birth:

Account Setup

* Username:

* Password:

* Confirm Password:

Next step →

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5. Click the **Create account** button on the *Review your Information* page. The *Verify Your Email* page displays.

Site Information

PROVIDER SITE
DMart Pharmacy

ADDRESS
101 Creek Park, Rensselaer, CA
548745677

LOCATION NPI
7654390102

Review Your Information

User Information [Edit](#)

First name: Mary

Middle name:

Last name: Martin

Email address: mary.martin@mailinator.com

Professional license number:

Date of birth: 03/01/1994

Username: mary.martin

Password: ●●●●●●●●

Create account

Provider Staff receive an email with the *Family PACT One Time Passcode* to verify their account on the *Verify Your Email* page.


Family PACT
Family Planning, Access, Care,
and Treatment

This is an automated message from the Family PACT Program.
Please do not reply to this email.
You have requested a One-Time Passcode, which is included for you below.
One-Time Temporary Passcode: 026929
Please enter your One-Time Temporary Passcode to confirm your identity.
For additional help or questions, please call on 800-906-8521
Thank you,
Family PACT Program

[About Us](#)

6. Enter the OTP on the *Verify Your Email* page.

- Clicking the **Resend code** link sends a new OTP

7. Click the **Verify code** button.

The *Log in or create an account to find coverage* page displays.

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Verify Your Email

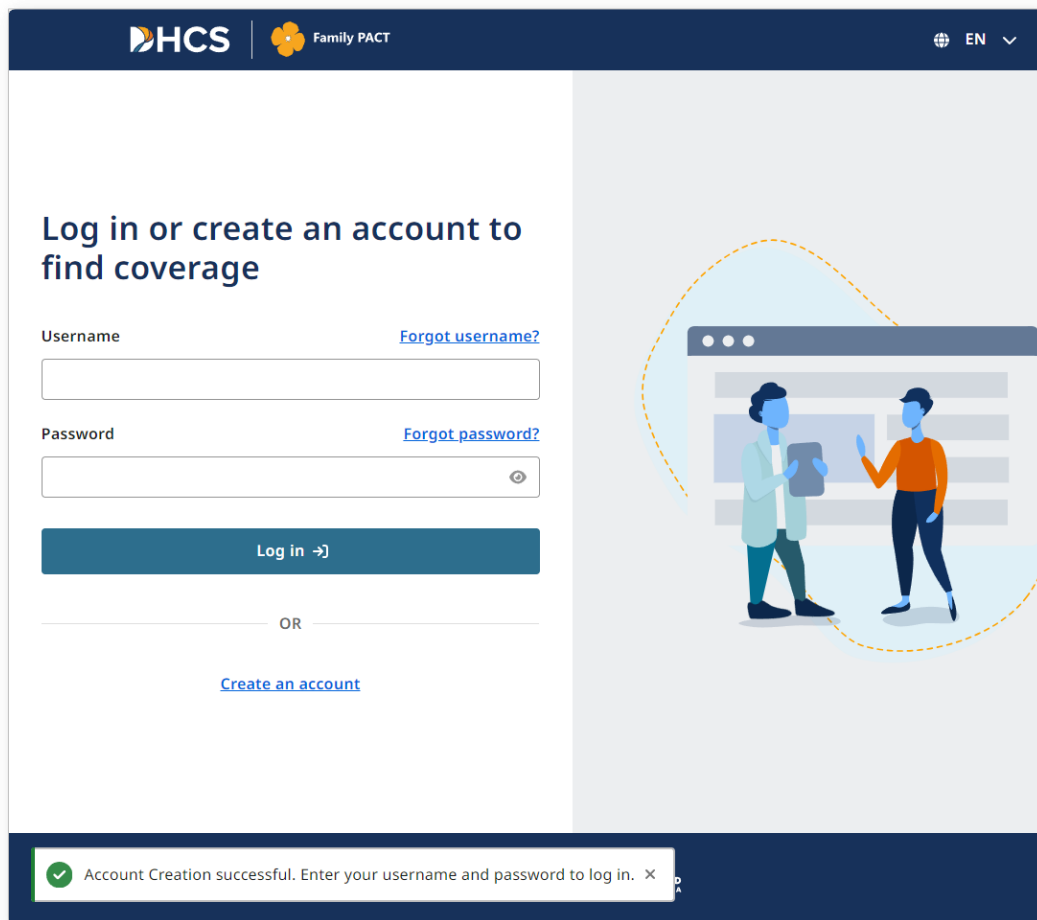
Enter the 6-digit code sent to your email address: a●●●●●●@mailinator.com

Didn't get the code yet?
[Resend code](#)

Verify code

JOB AID: SITE CERTIFIER AND PROVIDER ACCOUNT CREATION

An *Account Creation successful. Enter your username and password to log in.* message displays on the bottom of the *Log in or create an account to find coverage* page.



The screenshot displays the Family PACT login page. At the top, the HCS and Family PACT logos are visible, along with a language selector set to 'EN'. The main heading reads 'Log in or create an account to find coverage'. Below this, there are input fields for 'Username' and 'Password', each with a corresponding 'Forgot' link. A 'Log in →' button is positioned below the password field. An 'OR' separator is followed by a 'Create an account' link. On the right side, there is an illustration of two people interacting with a computer screen. At the bottom, a dark blue banner contains a green checkmark icon and the message: 'Account Creation successful. Enter your username and password to log in. ×'.