



California Healthcare Eligibility,
Enrollment, and Retention System

JOB AID: ACCESS MANAGEMENT DASHBOARD

September 19, 2025

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 *[Access Management] 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, [add entitlements to a Provider Staff account,] 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 as resending or revoking account creation invitations, editing basic account details, [managing site access,] and deactivating an account for a Provider Staff.

[Access Management] Dashboard Overview

Site Certifiers access the *[Access Management] 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:

Access Management Dashboard

Site Certifier

Site Information

AIDS PROJECT OF THE EAST BAY
8400 ENTERPRISE WAY, STE 101,
SANTA ANA, CA, 92173
NPI: 9990001385

Pending Staff Accounts

STAFF NAME	STAFF EMAIL	ADDED ON	
Jones, Jerry	jerry@mailinator.com	08/20/2025	⋮
Miller, Josh	joshmiller@mailinator.com	08/22/2025	⋮
Dean, Anthony	anthonydean@mailinator.com	09/08/2025	⋮
Orr, Denver	denverorr@mailinator.com	09/08/2025	⋮
Emich, Sam	samemich@mailinator.com	09/08/2025	⋮

1-5 of 5 items

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- **+ Add [Provider] Staff** button – Navigates the user to *Add [Provider] Staff* page
- **[Switch location]** caret – Dynamically displays when the Site Certifier is associated with more than one site location. Clicking the caret displays a list of associated sites in alphabetical order. A checkmark displays next to the selected site]
- **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
 - *NPI* – Displays the National Provider Identifier (NPI) number for the site location
- Provider Staff accounts associated with the site location display in three tabs:

Switch location ▾

✓ AIDS PROJECT OF THE EAST BAY
8400 ENTERPRISE WAY, STE 101, SANTA ANA, CA, 92173

ELM CHILDRENS COMM HLTH
2798 ELM AVENUE, SUITE 330, GLENDALE, CA, 92173

SCHWARTZ, STANLEY H MD INC
12980 FREDERICK ST, BLOOMINGTON, CA, 92173

Site Information

AIDS PROJECT OF THE EAST BAY

8400 ENTERPRISE WAY, STE 101,
SANTA ANA, CA, 92173

NPI: 9990001385


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 [Account] 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

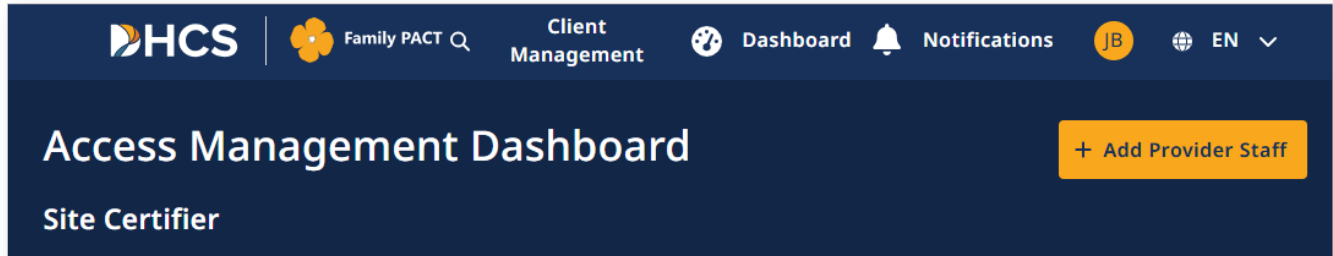
Add Staff Account to get started

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Add New Provider Staff

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

1. Click the **+ Add [Provider] Staff** button. The *Add [Provider] Staff* page displays.



2. [Select the **New provider staff** radio button. The Name and email address fields dynamically display.]

3. Enter the following information for the Provider Staff account:

- **First name**
- **Middle name**
- **Last name**
- **Email address**
- *[Email language]*

Note: Required fields are indicated with an asterisk.

[The **Confirm and send invitation** button displays when the Site Certifier is associated to only one site. The **Next** button displays when the Site Certifier is associated with more than one site.]

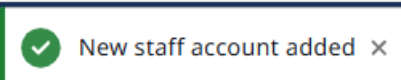
4. Click the **Confirm and send invitation** button. An invitation is sent to the email entered for the Family PACT account.

- Clicking the **Cancel** button navigates the user to the *[Access Management] Dashboard*

A screenshot of the 'Add Provider Staff' form. The form is divided into two main sections. On the left, under 'Site Information', there is a location card for 'DMart Pharmacy' at '101 Creek Park, Rensselaer, CA, 54874' with NPI: 0000000000. On the right, the 'Add Provider Staff' section contains a radio button selection for 'Is this a new or existing provider staff?' with 'New provider staff' selected. Below this are input fields for 'First name', 'Middle name', 'Last name', and 'Email address', all marked with an asterisk to indicate they are required. There is also a dropdown menu for 'Email language' currently set to 'English'. A hint below the dropdown states: 'Hint: This will default to English if another language is not chosen.' At the bottom of the form, there is a large blue button labeled 'Confirm and send invitation' and a smaller blue link labeled 'Cancel'.

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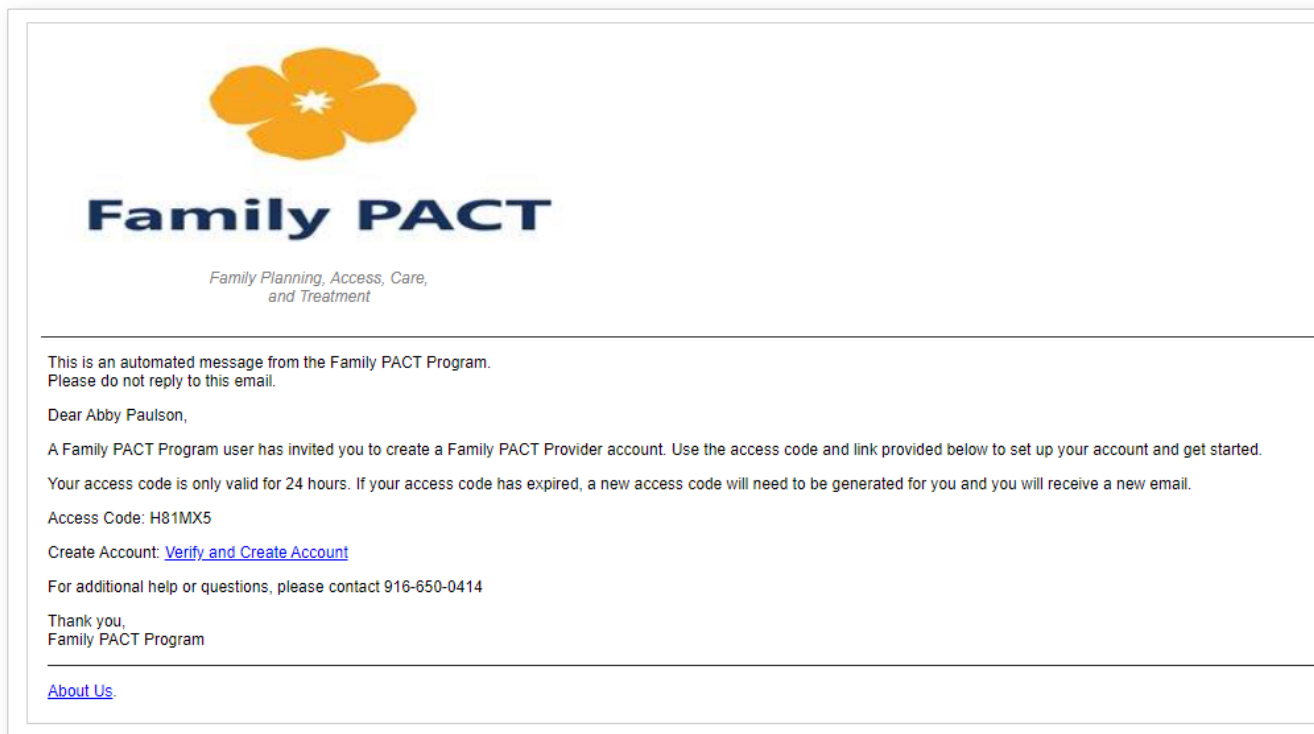
[The *Access Management Dashboard* displays with] a *New staff [account] added* message informing the user that the member is successfully added.



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

The Provider Staff displays on the **Pending** tab of the [*Access Management*] *Dashboard*.

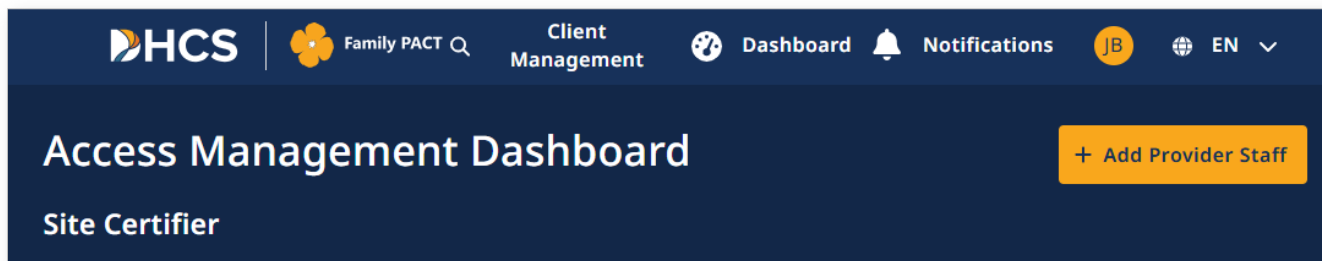
Provider Staff receive an email with information needed to create their Family PACT account.



[Add Existing Provider Staff

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

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



2. Select the **Existing provider staff** radio button. The *Add provider staff by:* field dynamically displays with **Email address** and **Phone number** radio buttons.

3. Select the **Email address** radio button to dynamically display the **Email address** field.

OR

Select the **Phone number** radio button to dynamically display the **Phone number** field.

4. Enter the Provider Staff's email address in the **Email address** field, or the phone number in the **Phone number** field.

The **Confirm and send invitation button** displays when the Site Certifier is associated to one site. The **Next** button displays when the Site Certifier is associated with more than one site.

5. Click the **Next** button. The *Add Site Access (Optional)* page displays.]

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- [The *No Match Found* popup displays when an account does not match the email address or phone number entered
 - Clicking the **Ok** button closes the popup
- The *Provider Staff Already Associated to Site* popup displays when the Provider Staff is already associated to the selected site
 - Clicking the **Access Management Dashboard** button navigates the user to the *Access Management Dashboard*
 - Clicking the **Close** button closes the popup and displays the *Add Provider Staff* page
- The *Maximum Sites Reached* popup displays when the site being added is the Provider Staff's 40th site
 - Clicking the **Confirm** button successfully adds the Provider Staff to the site location, closes the popup, and navigates the user to the *Access Management Dashboard*
- The *Maximum Sites Reached* popup displays when the Provider Staff is already assigned to 40 active site locations and the current request cannot be processed
 - Clicking the **Ok** button closes the popup and displays the *Add Provider Staff* page



No Match Found

We were not able to find an account matching this daisy@gmail.com. You can try searching by a different method, or create an invitation for a new Provider Staff.

Ok



Provider Staff Already Associated to Site

This provider staff is already associated to this site. If you manage multiple sites, you may choose a different site from the Access Management Dashboard to add this provider staff to. You may also close this modal and choose a new provider staff not associated with this site.

Access Management Dashboard

Close



Maximum Sites Reached

This user has reached the maximum number of provider sites they can be associated with. You can continue to add the currently selected site, but will not be able to add any more without first removing sites through Manage Site Access.

Confirm



Maximum Sites Reached

This user has reached the maximum number of provider sites they can be associated with. You will not be able to add any more sites. To add new sites to this user, you will need to remove site access through Manage Site Access.

Ok

Clicking the **Next** button on the *Add Provider Staff* page navigates the Site Certifier to the *Add Site Access (Optional)* page. Messaging displays at the top informing the user the number of sites the Provider Staff is associated to, and the number of sites that can be added for the Provider Staff.

- OR

Note: A *You have reached the maximum number of locations.* message displays when the Provider Staff is already associated to the maximum number of site locations (40).

- Click the **Confirm** button. The *Access Management Dashboard* displays with a *New staff account added* message informing the user that the member is successfully added.

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Add Site Access (Optional)

📍

Site Information

AIDS PROJECT OF THE EAST BAY
8400 ENTERPRISE WAY, STE 101,
SANTA ANA, CA, 92173
NPI: 9990001385

Med and Care Clinic
2742 Oak Rd, 203,
Walnut Creek, CA, 94597
NPI: 9200000121

TEST MEDICAL CLINIC
600 MAIN STE,
SOLEDAD, CA, 93960
NPI: 2003822517

You may give this provider staff access to other sites in addition to the sites shown in the Site Information panel. Choose additional sites from the list of sites below.

This provider staff is already associated with 3 sites. You may add 37 more sites.

Provider staff name
TEST STAFF

Added Sites (0/37)
[Select all](#)

☐

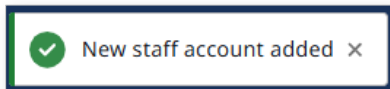
ELM CHILDRENS COMM HLTH
2798 ELM AVENUE, SUITE 330,
GLENDALE, CA, 92173
NPI: 9990000418

☐

SCHWARTZ, STANLEY H MD
INC
12980 FREDERICK ST,
BLOOMINGTON, CA, 92173
NPI: 9990002449

Confirm

Cancel



- Clicking the **Cancel** button navigates the user to the *Access Management Dashboard*

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

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

Mariez, Jose	josemariez@mailinator.com	07/11/2024	⋮
Sandoval, Marco	marco@mailinator.com	07/11/2024	

Resend invitation

Edit Staff Account

Revoke invitation

- **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 [Provider]*
- *Staff* page with fields to update the pending Provider Staff's **First name, Middle name, Last name, Email address,** [and *Email language*.

The **Confirm and send invitation** button displays when the Provider Staff is associated to one site. The **Next** button displays when the Provider Staff is associated to more than one site.]

Clicking the **Confirm and send invitation** button resends the Family PACT account creation invitation email. A *Changes saved successfully.* message displays.

[Clicking the **Next** button navigates the user to the *Edit Site Access (Optional)* page.

The *Edit Site Access (Optional)* page displays sites associated with the Provider Staff. Selecting one or more [*Site Name*] checkboxes and clicking the **Confirm and send invitation** button removes the sites and resends the Family PACT account creation invitation email. A *Changes saved successfully.* message displays.

- Clicking the **Cancel** button navigates the user to the *Access Management Dashboard*]

The screenshot shows the 'Edit Provider Staff' form. On the left, under 'Site Information', there are two site entries: 'AIDS PROJECT OF THE EAST BAY' and 'ELM CHILDRENS COMM HLTH'. The main form area contains fields for:

- * First name:** Text input with 'Jerry'.
- Middle name:** Text input (empty).
- * Last name:** Text input with 'Jones'.
- * Email address:** Text input with 'jerry@mailinator.com'.
- Email language:** Dropdown menu set to 'English'.

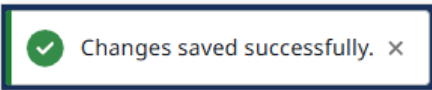
 At the bottom, there is a blue 'Next' button and a 'Cancel' link.

The screenshot shows the 'Edit Site Access (Optional)' form. It includes a 'Back' link and a message: 'Select the sites you want to remove from the invitation. You must keep at least one site to send the invitation.' Below this, the 'Provider staff name' is listed as 'Jerry Jones'. Under 'Sites that will be removed (0/2)', there are two entries, each with a checkbox:

- ☐ AIDS PROJECT OF THE EAST BAY (NPI: 9990001385)
- ☐ ELM CHILDRENS COMM HLTH (NPI: 9990000418)

 At the bottom, there is a blue 'Confirm and send invitation' button and a 'Cancel' link.

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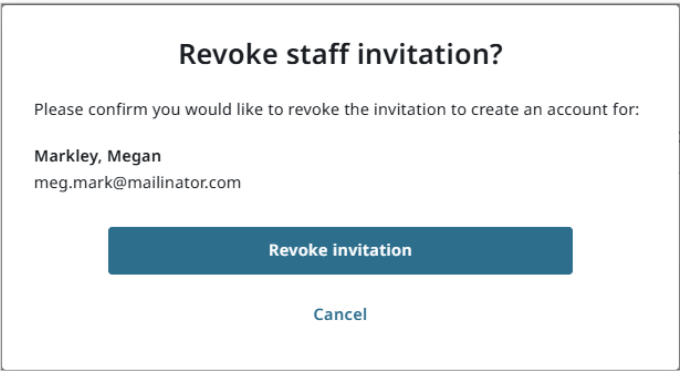
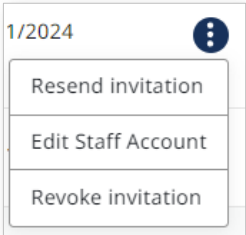


- **Revoke invitation** – Clicking the **Revoke invitation** option displays the *Revoke staff invitation?* popup with the staff's first name, last name, and email address allowing the user to review the account information being revoked

- 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

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

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	⋮

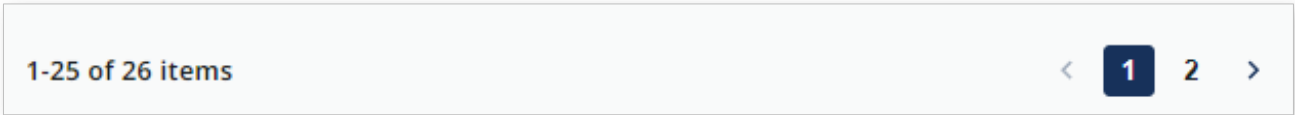
1-2 of 2 items

<

1

>

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



JOB AID: ACCESS MANAGEMENT DASHBOARD

- 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

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

[**Note:** An icon displays next to the Provider Staff name to identify those Provider Staff who have access management privileges.]

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

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, closes the popup, and displays a *Staff Account deactivated successfully.* message



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.

Pending			
Active			
Deactivated			
Active Staff Accounts			
STAFF NAME	STAFF EMAIL	ADDED ON	
STAFF, TEST	teststaff137@mailinator.com	08/04/2025	
Miller, Josh	joshmiller@mailinator.com	08/22/2025	
1-2 of 2 items			

07/29/2025

Deactivate staff account

Add entitlement

Manage site access

Deactivate staff account?

Please confirm if you want to deactivate this user's account. If you do, they will be unable to access any of their provider sites or use their account.

Gene, Tara
taragene@mailinator.com

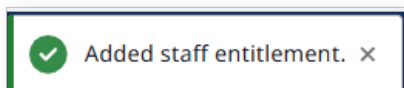
Deactivate

Cancel

- Clicking the **Cancel** button closes the popup and cancels the deactivation process
- [Add entitlement – Clicking the **Add entitlement** option displays the *Add entitlement?* popup allowing the Site Certifier to add an entitlement to the Provider Staff's account

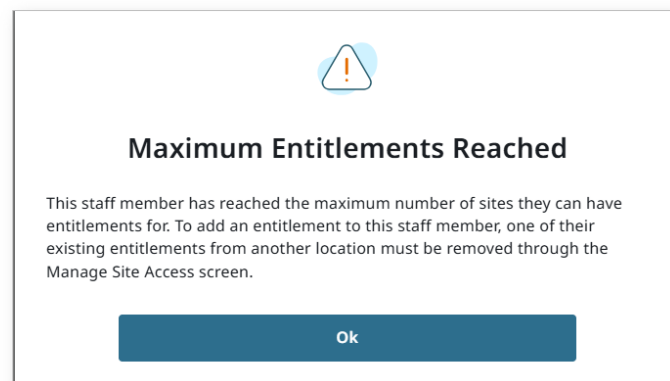
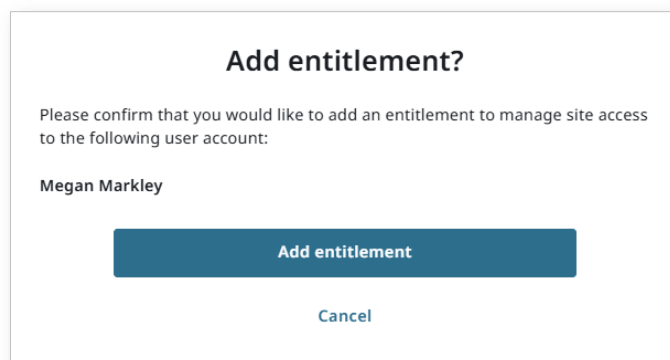
Note: Adding the entitlement or privilege allows the Provider Staff to manage site access for other Provider Staff.

- Clicking the **Add entitlement** button closes the popup and displays the *Added staff entitlement.* message



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

Note: The *Maximum Entitlements Reached* popup displays when the site or the selected Provider Staff has reached the maximum allowable entitlements. Site locations may only have two Provider Staff with the additional entitlement to manage site access. Clicking the **Ok** button closes the popup.



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- **Manage site access** – Clicking the **Manage site access** option navigates the Site Certifier to the *Manage Site Access* page







Note: A *Privileged Provider Staff (#)* section with a **Remove entitlement** link displays for Privileged Provider Staff who have access management privileges at one or more locations.

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Deactivate staff account

Add entitlement

Manage site access

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Manage Site Access

Provider staff name
 John Daly

Privileged Provider Staff (1)

AIDS PROJECT OF THE EAST BAY

 8400 ENTERPRISE WAY, STE 101,
 SANTA ANA, CA, 92173

 NPI: 9990001385

[Remove entitlement](#)
[Remove site access](#)

Provider Staff (2)

ELM CHILDRENS COMM HLTH

 2798 ELM AVENUE, SUITE 330,
 GLENDALE, CA, 92173

 NPI: 9990000418

[Remove site access](#)

SCHWARTZ, STANLEY H MD INC

 12980 FREDERICK ST,
 BLOOMINGTON, CA, 92173

 NPI: 9990002449

[Remove site access](#)

- Clicking the **Remove entitlement** link displays the *Remove entitlement* popup
 - Clicking the **Remove entitlement** button removes the entitlement, closes the popup, and displays a *Removed staff entitlement.* message

✓ Removed staff entitlement. ✕

Remove entitlement?

Please confirm that you would like to remove this entitlement for the following user account:

John Daly

AIDS PROJECT OF THE EAST BAY

8400 ENTERPRISE WAY, STE 101,
SANTA ANA, CA, 92173

NPI: 9990001385

Remove entitlement

Cancel

- Clicking the **Cancel** button closes the popup
- Clicking the **Remove site access** link displays the *Remove site access?* popup to remove the site access for the user account

ELM CHILDRENS COMM HLTH
2798 ELM AVENUE, SUITE 330,
GLENDALE, CA, 92173
NPI: 9990000418

JOB AID: ACCESS MANAGEMENT DASHBOARD

- Clicking the **Remove site access** button removes the site access, closes the popup, and displays a *Removed site access.* message



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

Note: The **Remove site access** button enables when the Provider Staff is associated to more than one site location.]

Remove site access?

Please confirm that you would like to remove site access for the following user account:

John Daly

AIDS PROJECT OF THE EAST BAY
8400 ENTERPRISE WAY, STE 101,
SANTA ANA, CA, 92173
NPI: 9990001385

Remove site access

Cancel

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

Pending

Active

Deactivated

Deactivated Staff Accounts

Use the Add Staff feature if you want to reactivate a staff member who was previously deactivated.

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

1-2 of 2 items

<1>