California Healthcare Eligibility, Enrollment, and Retention System
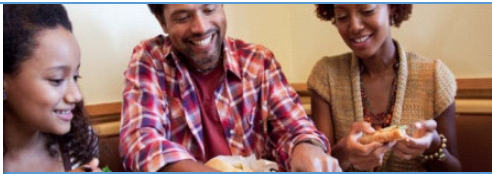
September 19, 2025

This Job Aid illustrates the account settings functionality for Family Planning, Access, Care, and Treatment (Family PACT) and is written from the perspective of a Site Certifier. Account Settings are 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

Navigate 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.
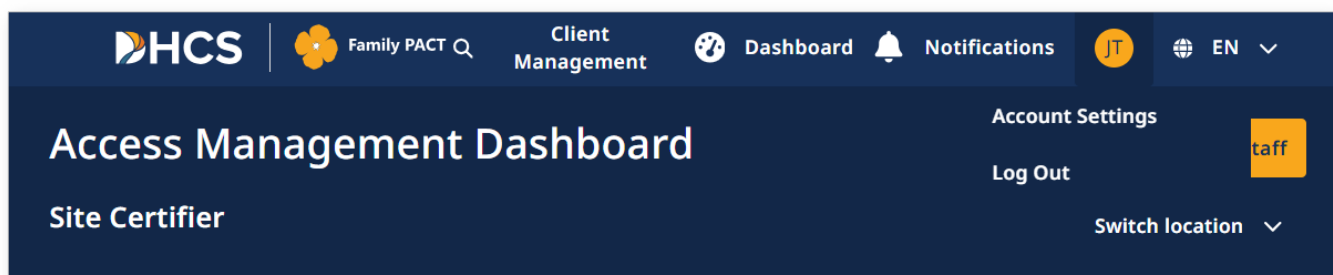
Personal Details

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 [four] section links: **Personal Details**, **Login Information**, **Security Preferences**, [and **Site Access**]. Users can quickly navigate to the section or page by clicking the link for that page.

[**Note**: The **Site Access** link only displays for Site Certifiers and Provider Staff.]

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

- **First name**

- **Middle name – Displays only** for Super Admin, SCR Admin, Site Certifiers, and Provider Staff

- **Last name**

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

  The *HAP ID* field only displays for Clients.

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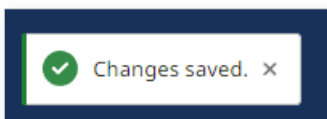
Changing a Password

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.
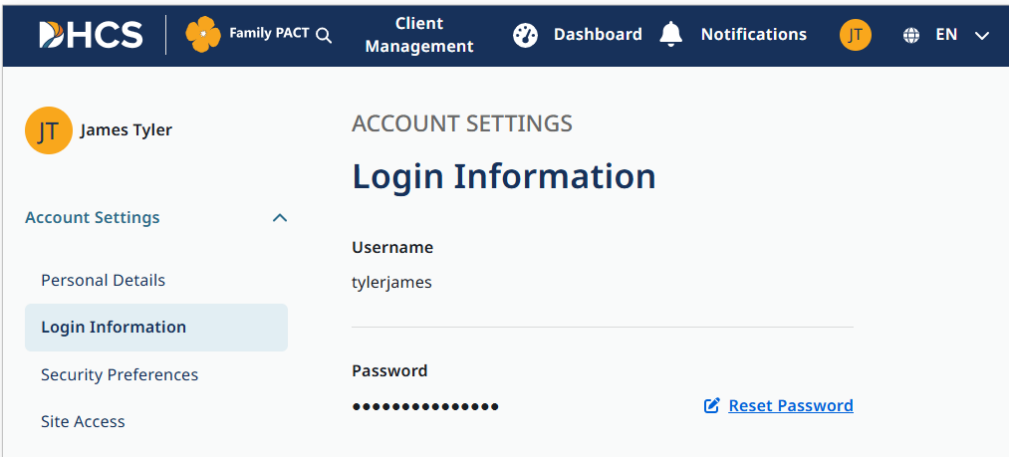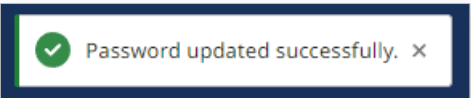

- Clicking the **Reset Password** link displays the *Reset Password* page

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

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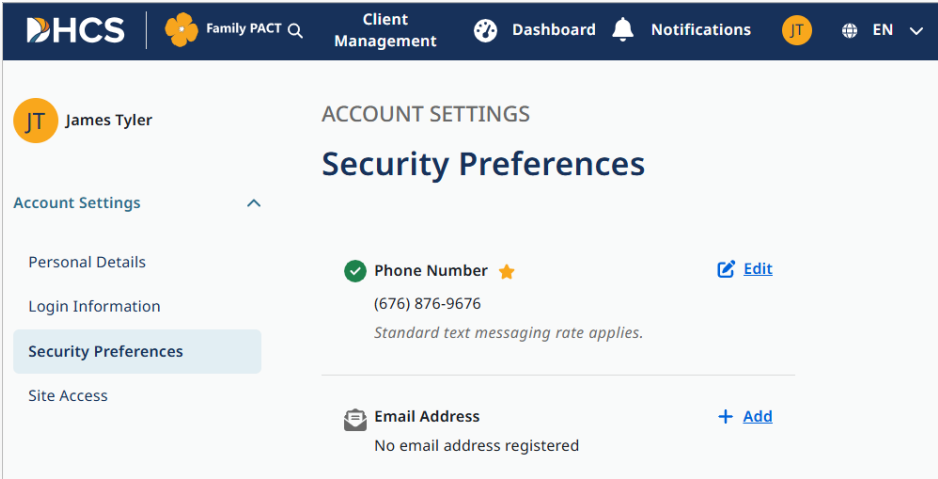
Adding a *Security Preference* otherwise known as a verification method:

- Clicking the **+ Add** link next to the *Phone Number* displays the *Register Your Phone Number* page

    o 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

- Clicking the **+ Add** link next to an unregistered email displays the *Register Your Email Address* page

- Entering an email, selecting a language for email communications, and clicking the **Send code** button sends the verify code to the email entered

Register Your Email Address

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.

* Email address

> mike.ross@mailinator.com

Email language ❓

> English ⌄

Hint: This will default to English if another language is not chosen.

Send code

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

JT James Tyler

Account Settings ⌃

Personal Details

Login Information

Security Preferences

Site Access

ACCOUNT SETTINGS

Security Preferences

✅ Phone Number ⭐   ✏️ Edit | 🗑️ Remove
(676) 876-9676
Standard text messaging rate applies.

✅ Email Address   ✏️ Edit | 🗑️ Remove
tylerjames@mailinator.com
English

Change preferred verification method

← Back

Edit Your Registered Phone Number

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.

* Phone number

> (564) 655-5565

Send code

- Clicking the **Edit** link next to a registered email displays the *Edit Your Registered Email Address* page

  o Entering a new email, selecting an email language, and clicking the **Save changes** button sends an email to the email address entered. The Family PACT One Time Passcode email includes the code to verify the email

← Back

Edit Your Registered Email Address

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. We will not send you a code if you are only updating your email language preference.

* Email address

mike.ross@mailinator.com

Email language ?

English ⌄

Hint: This will default to English if another language is not chosen.

Save changes

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

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

  ✓ Verification Method removed. ✕
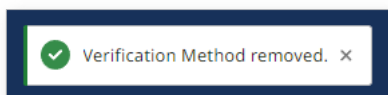
  o Clicking the **Cancel** button closes the popup

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

JT James Tyler

ACCOUNT SETTINGS

Security Preferences

Account Settings ⌃

Personal Details

Login Information

Security Preferences

Site Access

✓ **Phone Number** ⭐   ✎ Edit 🗑 Remove
(676) 876-9676
Standard text messaging rate applies.

✓ **Email Address**   ✎ Edit 🗑 Remove
tylerjames@mailinator.com
English

Change preferred verification method

⚠

Remove verification method?

Please confirm that you would like to remove the following verification method:

Email address
marcom@mailinator.com

Remove verification method

Cancel

- 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

  o Selecting the preferred verification method and clicking the **Save changes** button updates the preferred verification method

  o Clicking the **Cancel** button closes the popup
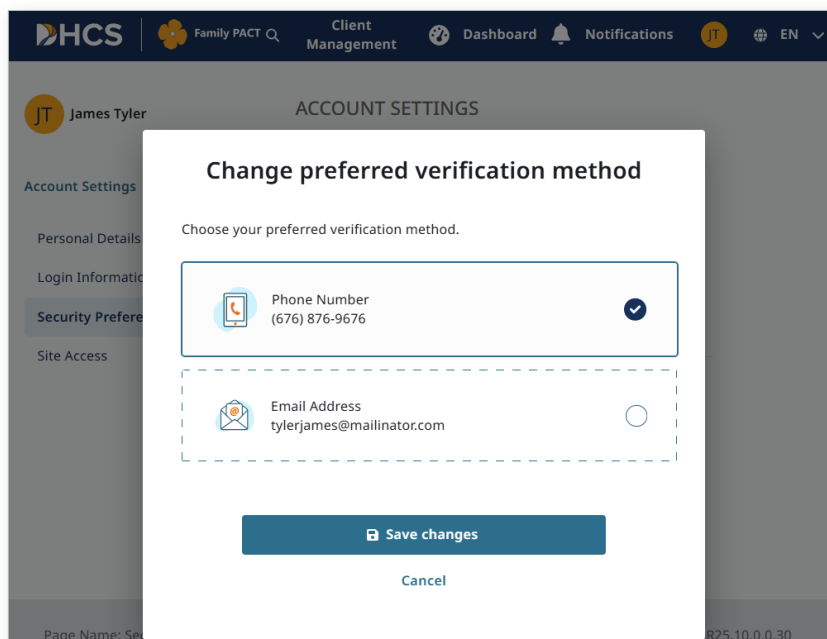
[**Viewing Site Access**

The **Site Access** link displays in the *Account Settings* section for the Site Certifiers and Provider Staff. Clicking the **Site Access** link displays all the Site Certifier locations the user is associated with. The number of locations displays next to the *Site Certifier [#]*.

- *Site name*

- *Site address*

- *NPI*
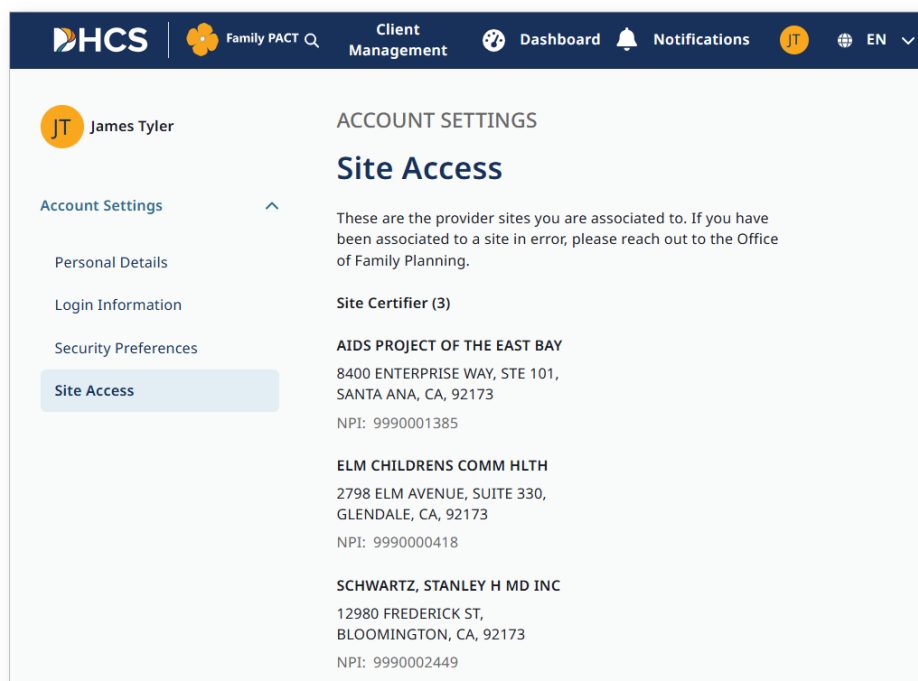
Note: A *Privileged Provider Staff (#)* section displays for Provider Staff who have been given additional privileges.

- Clicking the tooltip displays the message: *You have access management privileges at these locations.*]