JOB AID: CLIENT APPLICATION

California Healthcare Eligibility, Enrollment, and Retention System

September 19, 2025

This Job Aid is intended for Provider Staff assisting a Client and illustrates the steps to complete and submit a Family PACT application. The first step in completing a Family PACT application is creating a Family PACT account. This Job Aid is written from the perspective of a Client who has previously created a Family PACT account and is initiating the application process.

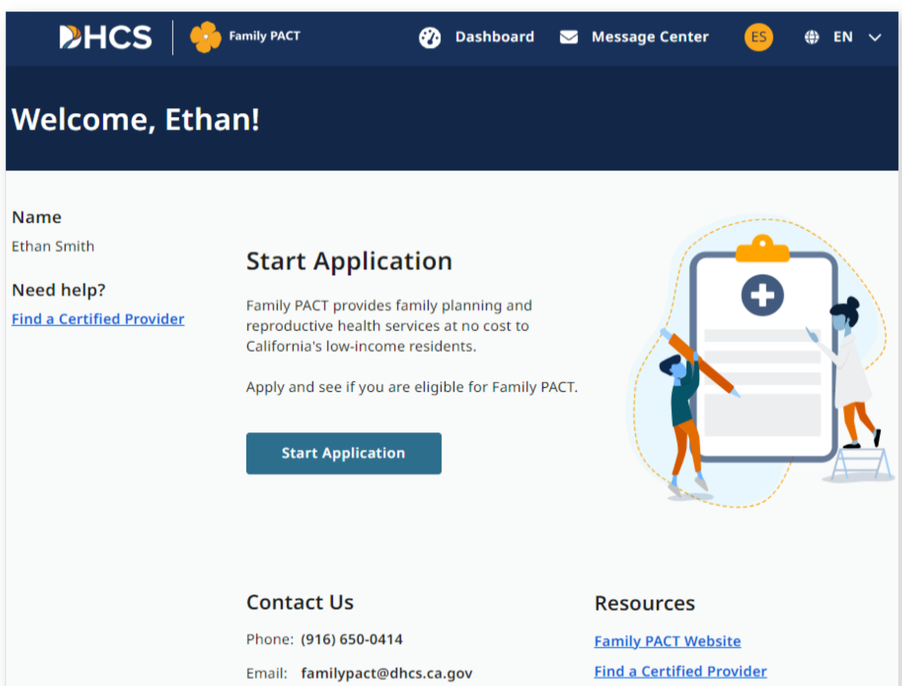
The Family PACT application is divided into five sections:

- *Personal Details*
- *Address and Contact*
- *Health Coverage*
- *Family Size and Income*
- *Review and Submit*

Start a New Application

The Client Dashboard displays when the Client logs in on the *Log in or create an account to find coverage* page.

Clients start the application process by clicking the **Start Application** button. The *Basic Information* page displays.



As Clients navigate through the application, a progress header with the name of each section, along with a numbered orange circle and dotted lines display at the top of each page. A green check mark displays above the section name when the section is complete.

Personal Details Section

The *PERSONAL DETAILS* section allows Clients to enter their personal details such as their name, ethnicity, and sexual orientation.

Basic Information

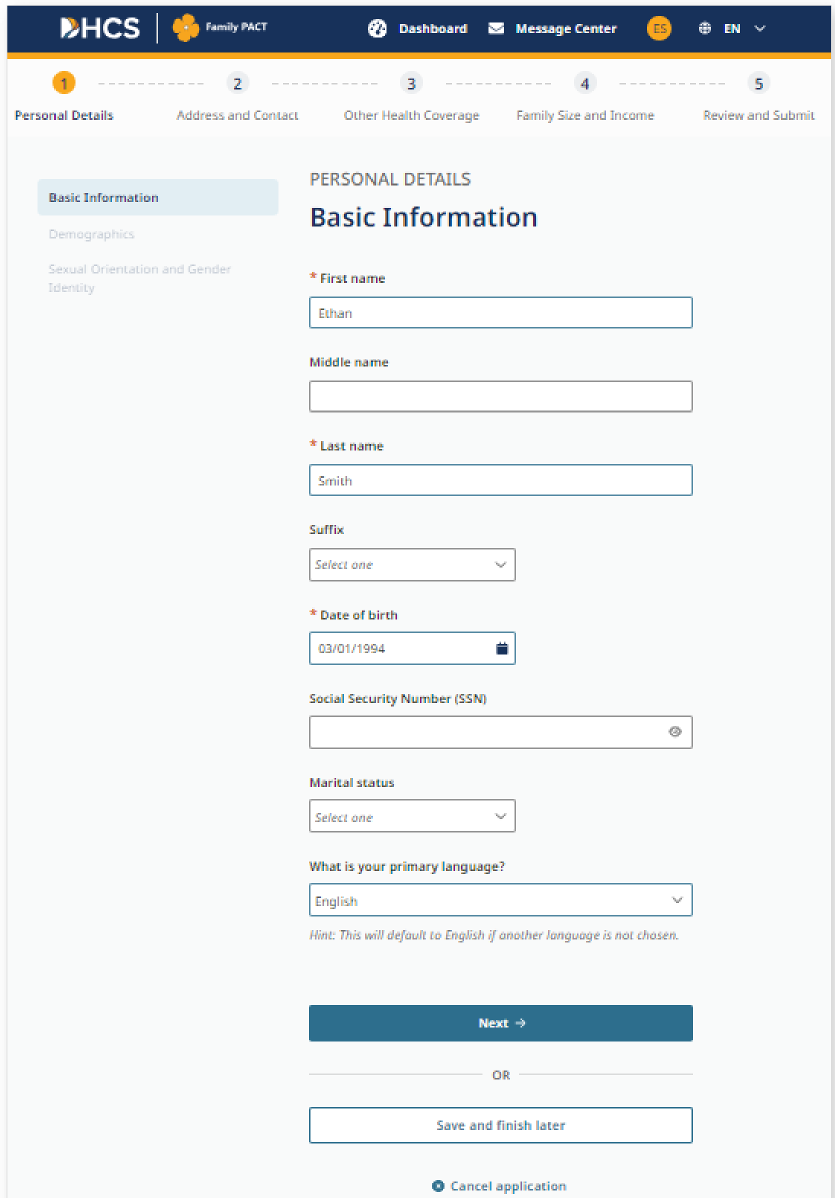
Clients enter following information on the *Basic Information* page:

- **First Name**
- **Last Name**
- **Middle Name**
- *Suffix*
- **Date of birth**
- **Social Security Number (SSN)**
- *Marital Status*
- *What is your primary language?*
  - Defaults to **English**

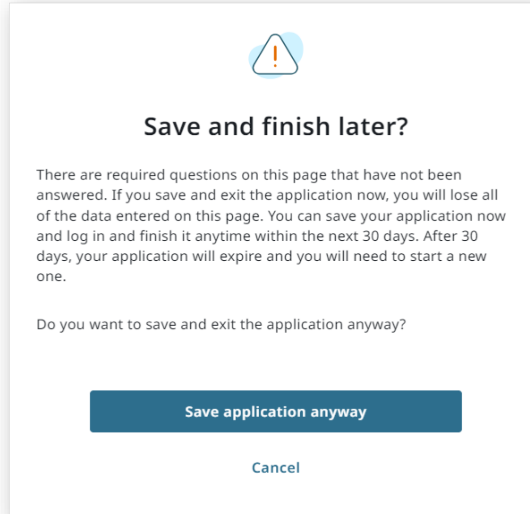
A red asterisk identifies required fields.

Note: The **First name**, **Last name**, and **Date of birth** fields pre-populate with information entered during the account creation process.

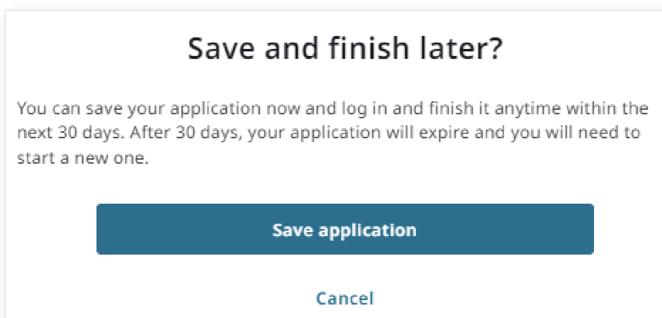
Clicking the **Next** button navigates the Client to the *Demographics Information* page.



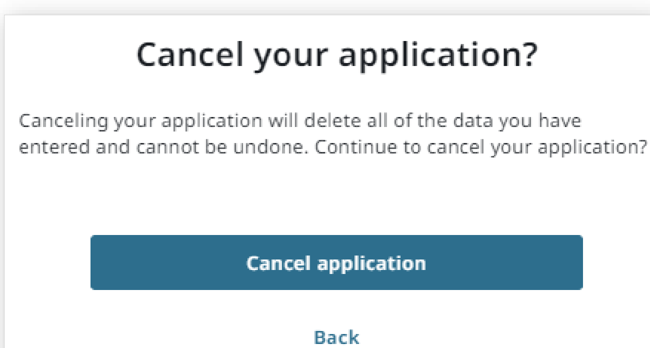
- The **Save and finish later** button displays at the bottom of each application page allowing the client to save their progress and complete the application later. Clicking the **Save and finish later** button displays one of two options based on the information saved in the application:



  - The *Save and finish later?* popup displays with an explanation point when required information is missing from the application
    - Clicking the **Save application anyway** button deletes the information entered on the page
    - Clicking the **Cancel** button closes the popup
  - The *Save and finish later?* popup displays when all required information has been entered. A message displays informing the Client that they have 30 days to finish the application.
    - Clicking the **Cancel** button closes the popup



- The **Cancel application** button displays at the bottom of each application page allowing the Client to cancel their application. Clicking the **Cancel application** button displays the *Cancel your application?* popup. Clients are informed that all entered data is deleted. Clicking the **Back** button closes the popup

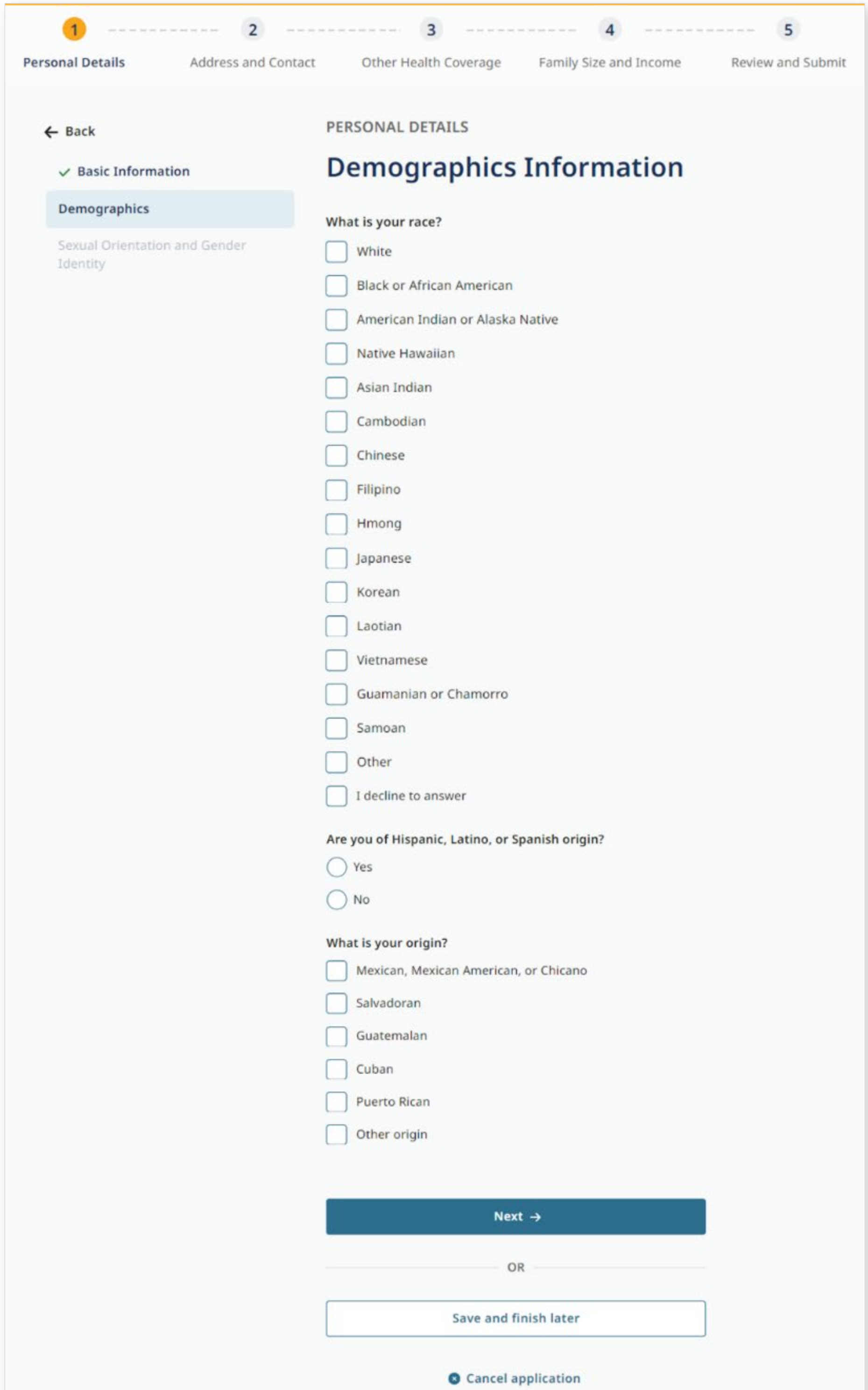


Demographics Information

The *Demographics Information* page displays optional questions as follows:

- **What is your race?**
- **Are you of Hispanic, Latino, or Spanish origin?**
- **What is your origin?**

Clicking the **Next** button navigates the Client to the *Sexual Orientation and Gender Identity* page.



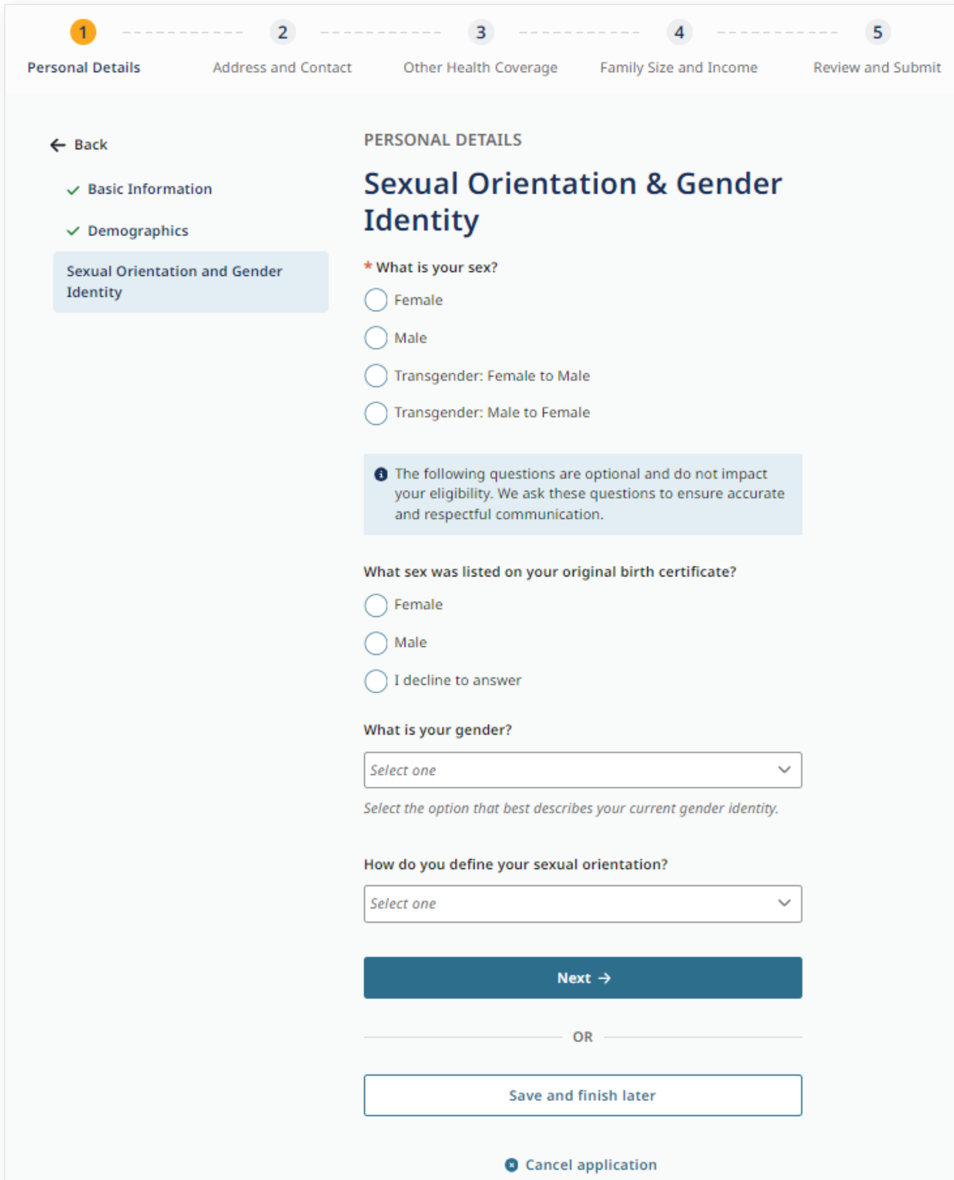
Sexual Orientation & Gender Identity

The *Sexual Orientation & Gender Identity* page displays questions related to the Client's sexual orientation and identity.

The only required question for this page is: ***What is your sex?*** The following options display for selection:

- **Female**
- **Male**
- **Transgender: Female to Male**
- **Transgender: Male to Female**

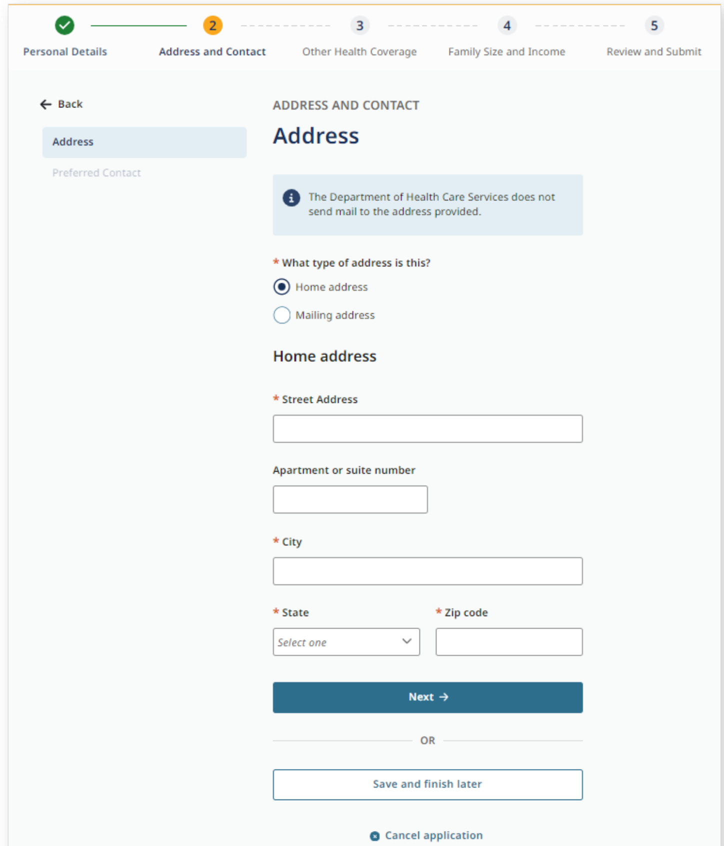
Clicking the **Next** button navigates the Client to the *Address and Contact* section.



Address and Contact Section

Clients enter their address and preferred contact method to receive information from the Department of Health Care Services (DHCS) regarding their Family PACT benefits.

Address



The *Address* page allows the Client to enter either their home or mailing address.

What type of address is this? displays for Clients to identify the type of address being entered. Available options are:

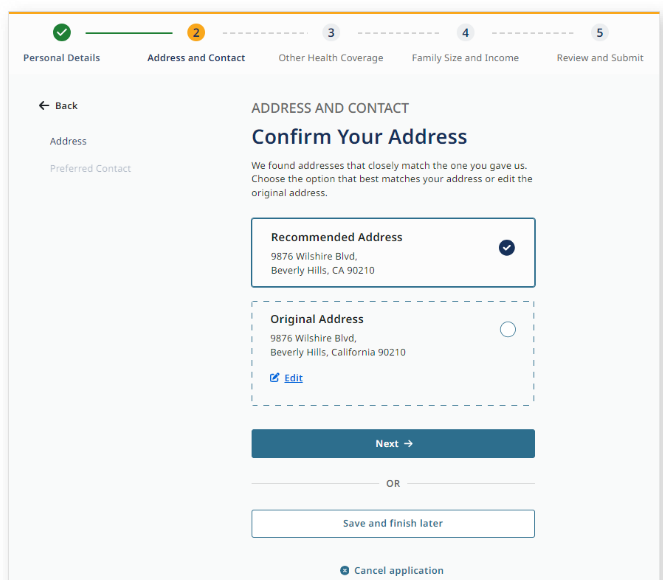
- **Home address** (default)
- **Mailing address**

The standard address fields are required:

- **Street Address**
- **Apartment or Suite number**
- **City**
- **State**
- **Zip code**

Clicking the **Next** button navigates the Client to the *Confirm Your Address* page.

Confirm Your Address

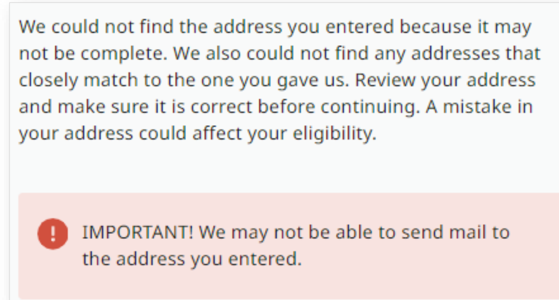


Smarty Streets software compares the address entered and dynamically displays the following on the *Confirm Your Address* page:

- *Recommended Address* tile – Displays the address when there is a match identified
- *Original Address* tile – Displays the original address entry
  - **Edit** link – Navigates the Client to the *Address* page to edit address information

Note: An *Other Matches* section displays with other likely addresses when the address entered cannot be confirmed. A **View more** link displays additional suggested addresses when more than one suggested address exists.

- Messaging displays informing the Client to review the address and make updates before continuing when no address is found



Clicking the **Next** button on the *Confirm Your Address* page navigates the Client to the *Preferred Contact Method* page.

Preferred Contact Method

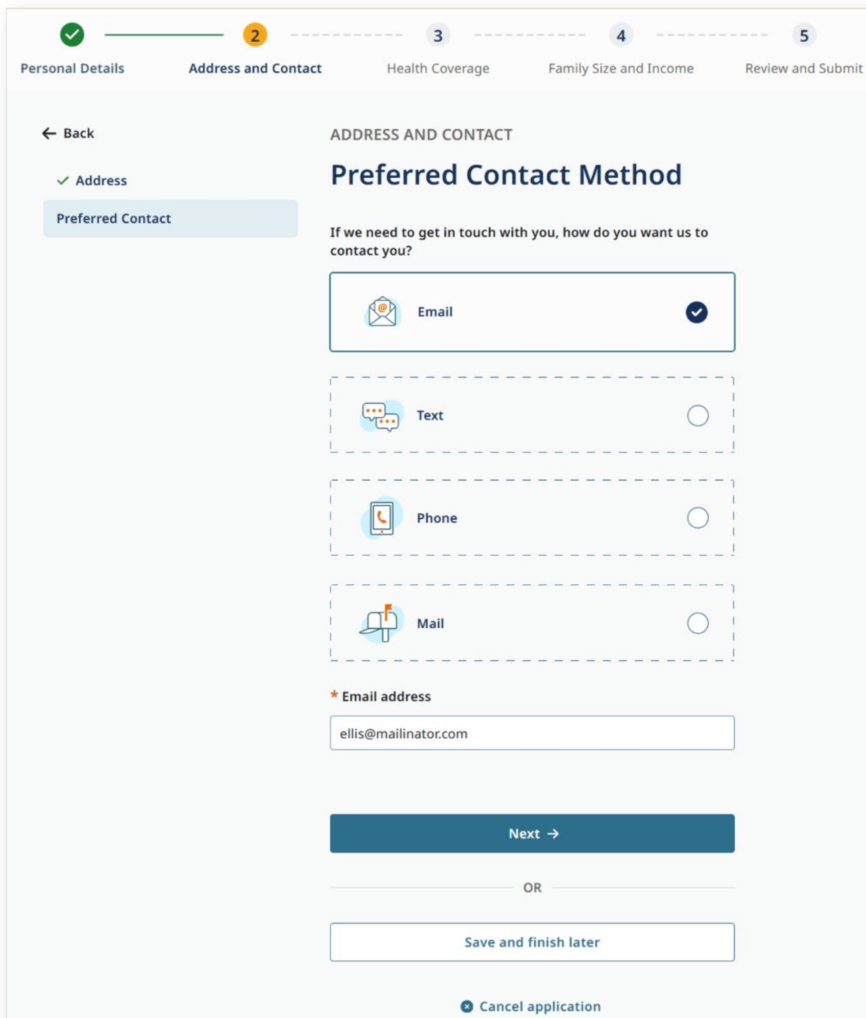
The *Preferred Contact Method* page displays a tile for each of the different contact methods. The method chosen during account creation pre-populates. Clients may select a different method by selecting the tile for that method.

The following contact methods display:

- **Email**
- **Text**
- **Phone**
- **Mail**

An **Email address** or **Phone number** field displays to enter contact information when **Phone**, **Email** or **Text** is selected as the preferred method.

Clicking the **Next** button navigates the Client to the *Health Coverage* section.

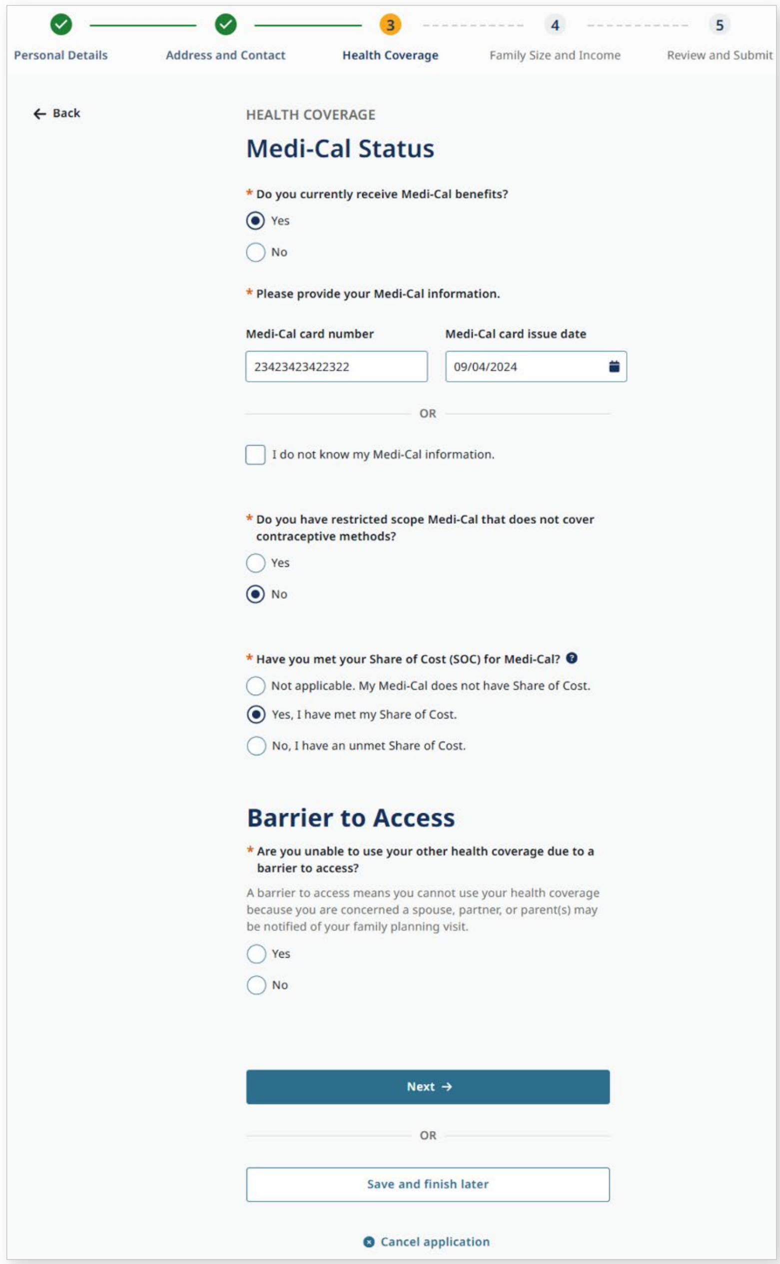


Health Coverage Section

The *Health Coverage* section displays questions about the Client's Medi-Cal status and other healthcare that covers contraceptive methods and Share of Cost.

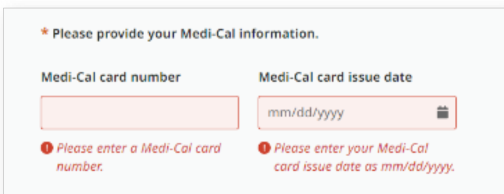
Medi-Cal Status

Clients answer questions regarding Medi-Cal benefits and provide additional Medi-Cal information. Questions dynamically display based on the Client's response.



Clicking the **Yes** radio button on the **Do you currently receive Medi-Cal benefits?** question displays:

- **Medi-Cal card number** field
- **Medi-Cal card issue date** field



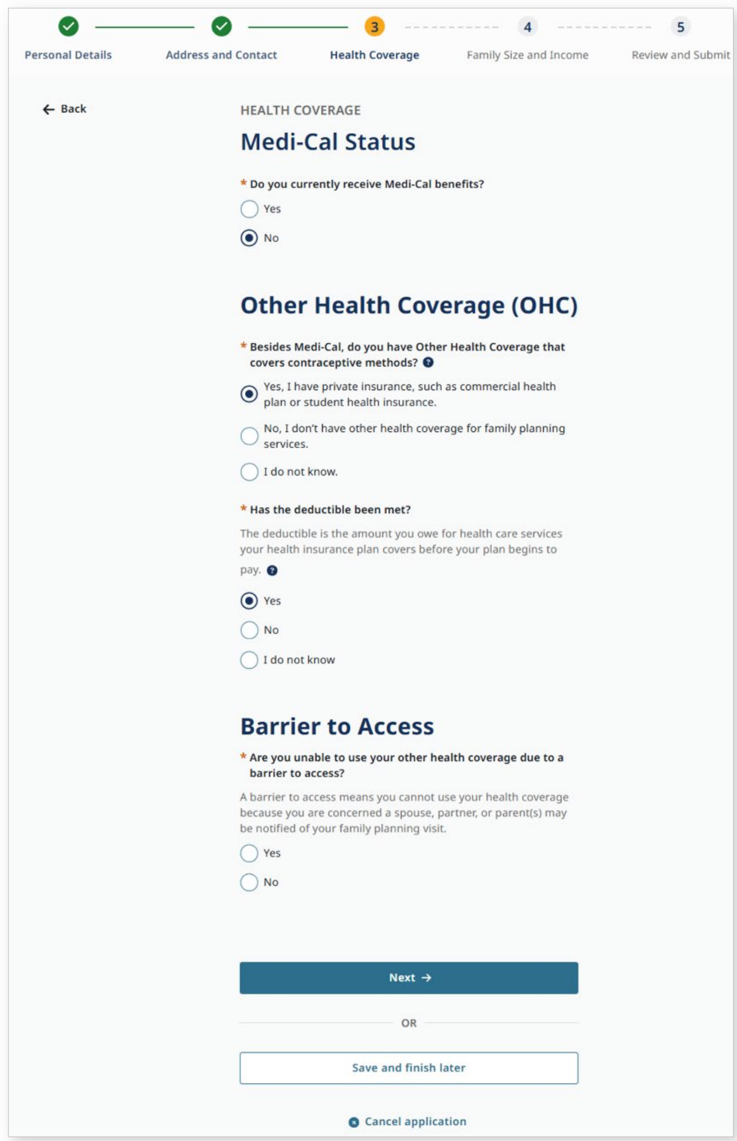
- **I do not know my Medi-Cal Information.** checkbox – Clicking the checkbox disables the **Medi-Cal card number** and the **Medi-Cal card issue date** fields
- **Do you have restricted scope Medi-Cal that does not cover contraceptive methods?** – Clicking the **Yes** radio button displays the *Other Health Coverage (OHC)* section
  - Clicking the **Not applicable. My Medi-Cal does not have Share of Cost.** or the **Yes, I have met my Share of Cost.** radio button displays the *Barrier to Access* section
  - Clicking the **No** radio button displays the **Have you met your Share of Cost (SOC) for Medi-Cal?** question. Clients select one of the following radio buttons:

- **Not applicable. My Medi-Cal does not have Share of Cost.**
- **Yes, I have met my Share of Cost.**
- **No, I have an unmet Share of Cost.**

  - Clicking the **No, I have an unmet Share of Cost.** radio button displays the *Other Health Coverage (OHC)* section

Note: Error messages display in red on the *Medi-Cal Status* page and prompts the Client to update the required fields when the Client skips the mandatory questions and clicks the **Update** button.

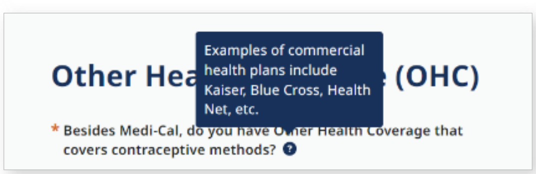
- Clicking the **tooltip** next to the **Have you met your Share of Cost (SOC) for Medi-Cal?** question displays:
- Share *of Cost (SOC) is similar to a private insurance plan's out-of-pocket deductible. It is a monthly dollar amount some Medi-Cal recipients must pay toward their medical expenses.*



Clicking the **No** radio button for the **Do you currently receive Medi-Cal benefits?** question displays the *Health Coverage (OHC)* section.

Clicking the tool tip by the question: **Besides Medi-Cal, do you have Other Health Coverage that covers contraceptive methods?** displays:

Examples of commercial health plans include Kaiser, Blue Cross, Health Net, etc.



- **Yes, I have private insurance, such as commercial health plan or student health insurance.** – Clicking the radio button displays the **Has the deductible been met?** question

- The **Has the deductible been met?** question displays the following radio buttons:
  - **Yes** – Clicking the **Yes** radio button displays the *Barrier to Access* section
  - **No**
  - **I do not know**

The *Barrier to Access* section displays the following messaging:

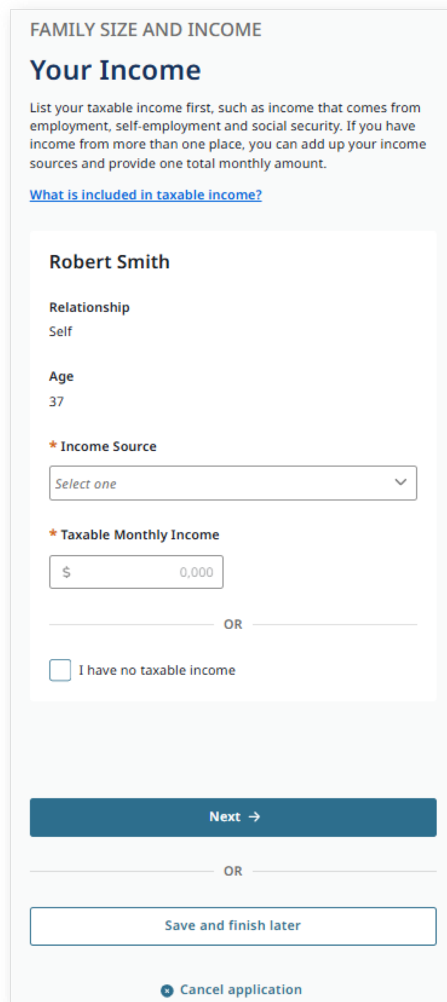
- *A barrier to access means you cannot use your health coverage because you are concerned a spouse, partner, or parent(s) may be notified of your family planning visit.* Clients respond by clicking the **Yes** or No radio button

Clicking the **Next** button navigates the Client to the *Family Size and Income* section.

Family Size and Income section

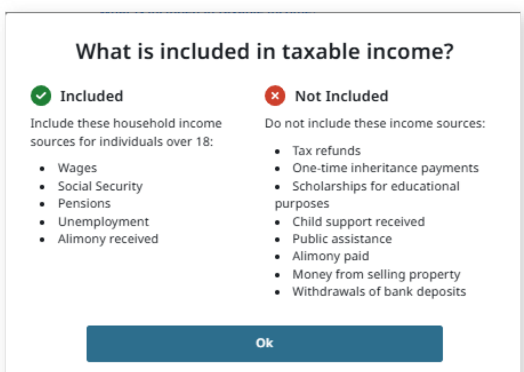
The *Family Size and Income* section allows Clients to enter information about their Household (HH) size, income source, and taxable income which is used to determine eligibility for Family PACT benefits.

Your Income



Clients enter their income from employment, self-employment, and Social Security on the *Your Income* page. A Client who has more than one income source should select one source and provide one total monthly amount from all income sources. The following displays:

- Informational messaging about acceptable income types
- Clicking the **What is included in taxable income?** link displays the *What is included in taxable income?* popup
  - Clicking the **Ok** button closes the popup



- The Client's first name, last name, *Relationship*, and *Age* pre-populate from details entered in the application

- Clicking the *Income Source* dropdown displays income sources for the Client to select such as **Self- employed**, **Wages or Salary**, **Social Security** etc.
- Clients enter their **Taxable Monthly Income**
- Checking the **I have no taxable income** checkbox disables the *Income Source* dropdown and **Taxable Monthly Income** fields

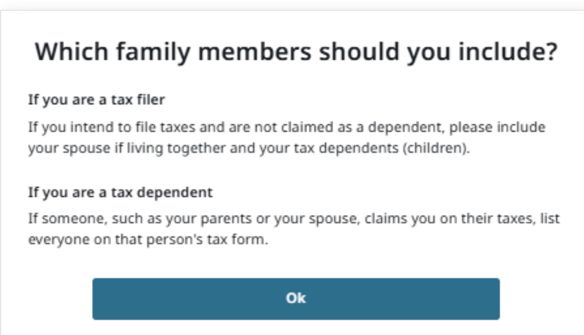
  Note: A minor's application is considered a Household (HH) of one and only the minor's income is considered.

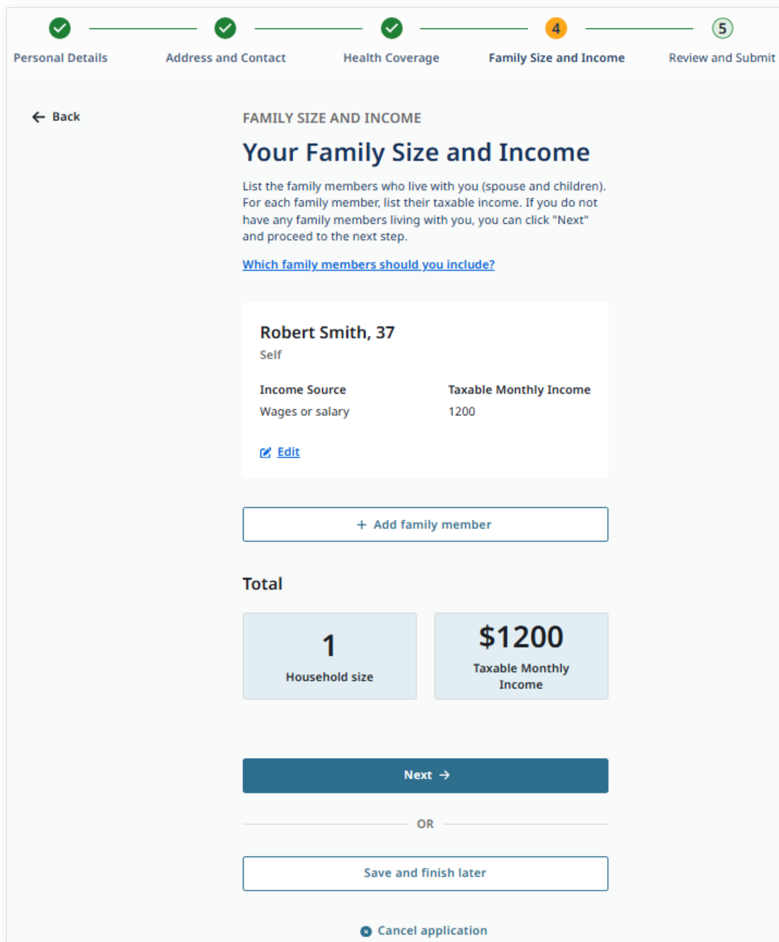
Clicking the **Next** button navigates the Client to the *Your Family Size and Income* page.

Your Family Size and Income

On the *Family Size and Income* page, the Client adds family members living in the same HH. The Client must list the taxable income for each family member added.

- Clicking the **Which family members should you include?** link displays the *Which family members should you include?* popup
- Clicking the **Ok** button closes the popup





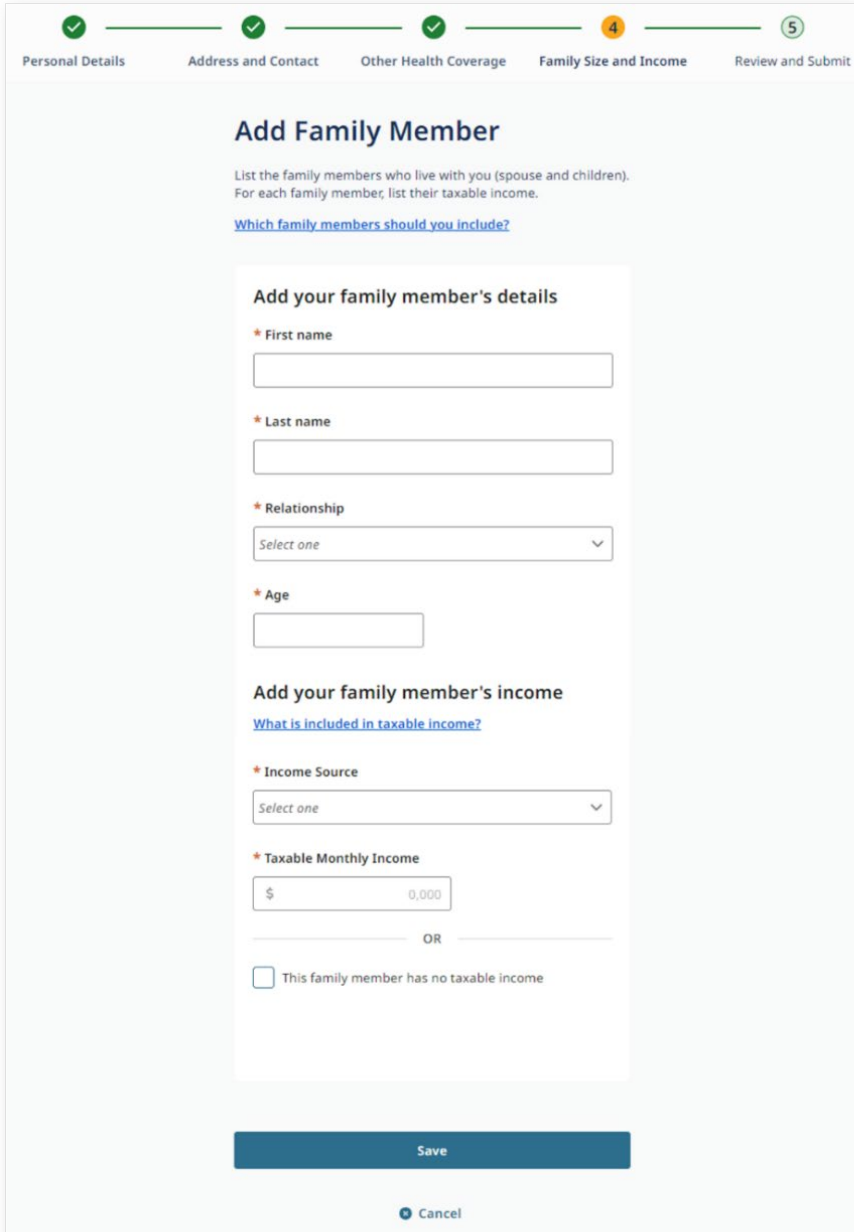
- Clicking the **Edit** link in the Client's *[Name], [Age]* tile navigates the Client to the *Your Income* page for the individual to edit the income source and taxable monthly income
- Clicking the **+ Add family member** button navigates the Client to the *Add Family Member* page. The **+ Add family member** button is disabled for minors

The *Add Family Member* page allows the Client to add family members living in the same household. The following family member information is required:

- *Add your family member's details* section:
  - **First Name**
  - **Last Name**
  - *Relationship*
  - **Age**
- *Add your family member's income* section:
  - *Income Source* dropdown
  - **Taxable Monthly Income** field

    OR

  - **This family member has no taxable income** checkbox – Select when the family member added does not have taxable income to report. The *Income Source* dropdown and **Taxable Monthly Income** fields disable

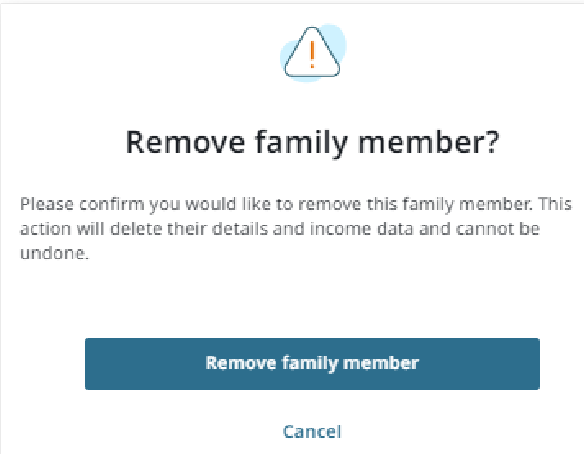


Clicking the **Save** button saves the family member's information and navigates the Client to the *Your Family Size and Income* page, displaying the new family member.

Clicking the **Cancel** button deletes all data entered and closes the page.

The *Your Family Size and Income* page displays all family members added to the Client's application.

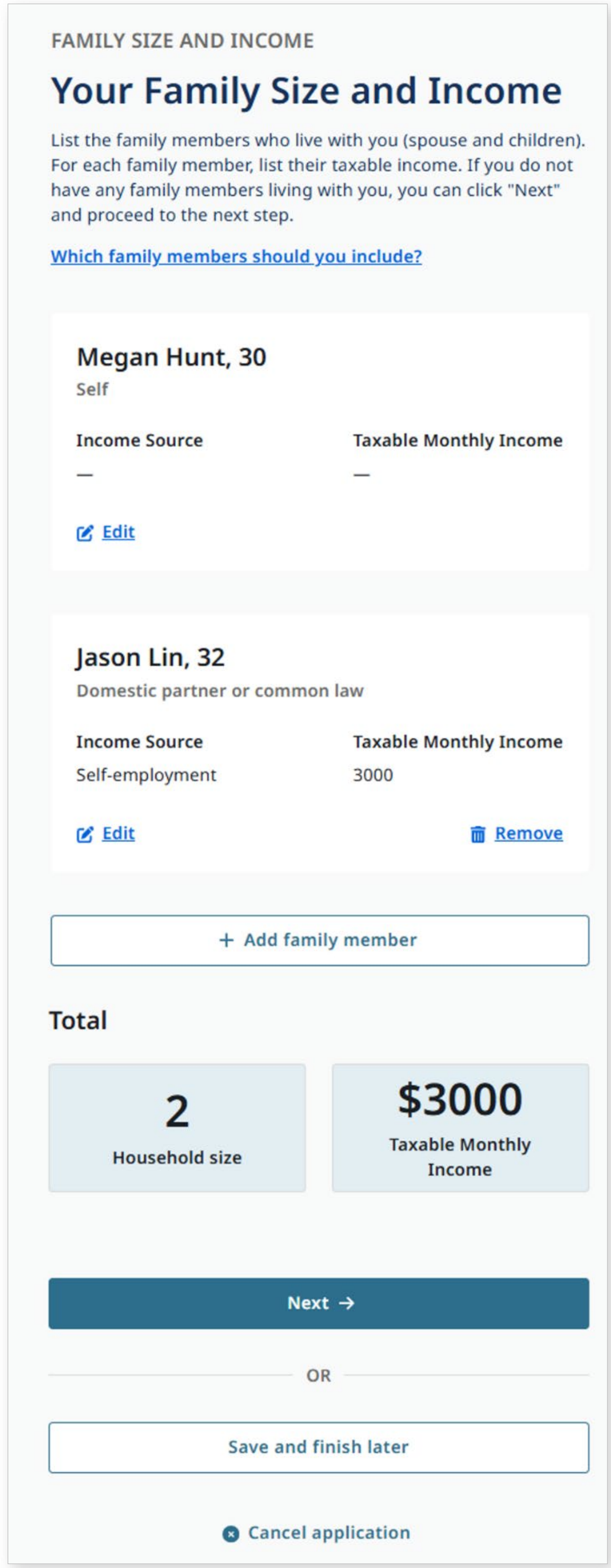
- Clicking the **Edit** link navigates the Client to the *Edit Family Member* page
- Clicking the **Remove** link displays the *Remove family member?* popup



  - Clicking the ***Remove family member?*** button removes the family member
  - Clicking the **Cancel** button closes the popup

- The *Total* section displays the Client's total *Household Size* and total *Taxable Monthly Income*

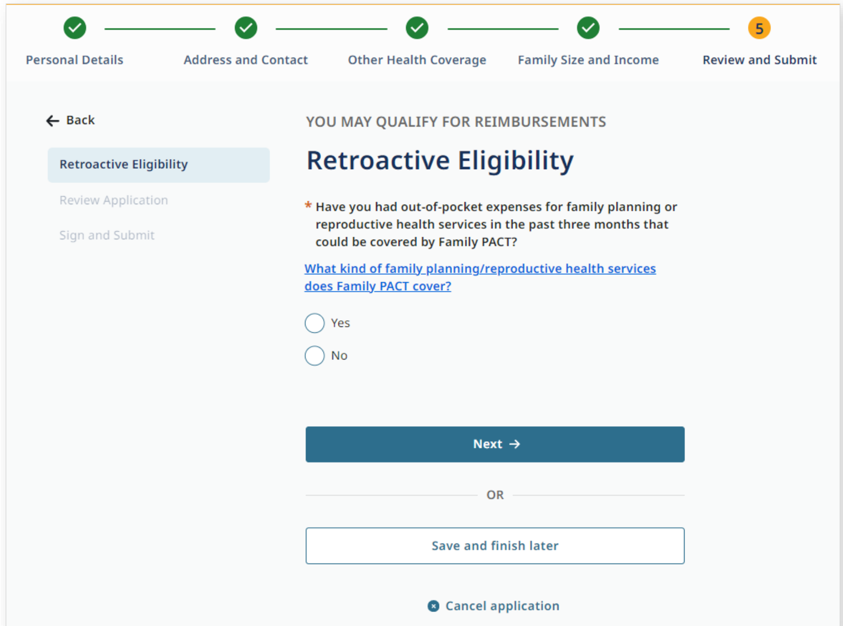
Clicking the **Next** button navigates the Client to the *Retroactive Eligibility* page.



Retroactive Eligibility

Retroactive Eligibility allows Clients who have paid for family planning or reproductive health services in the last 90 days to apply for reimbursement of those costs.

- Selecting the **Yes** radio button displays a *You may be eligible for Retroactive Eligibility!* tile in the *Get Started with your Family PACT Program* section on the Client Dashboard. Clicking the **How to apply** caret expands the section and displays steps on how to apply

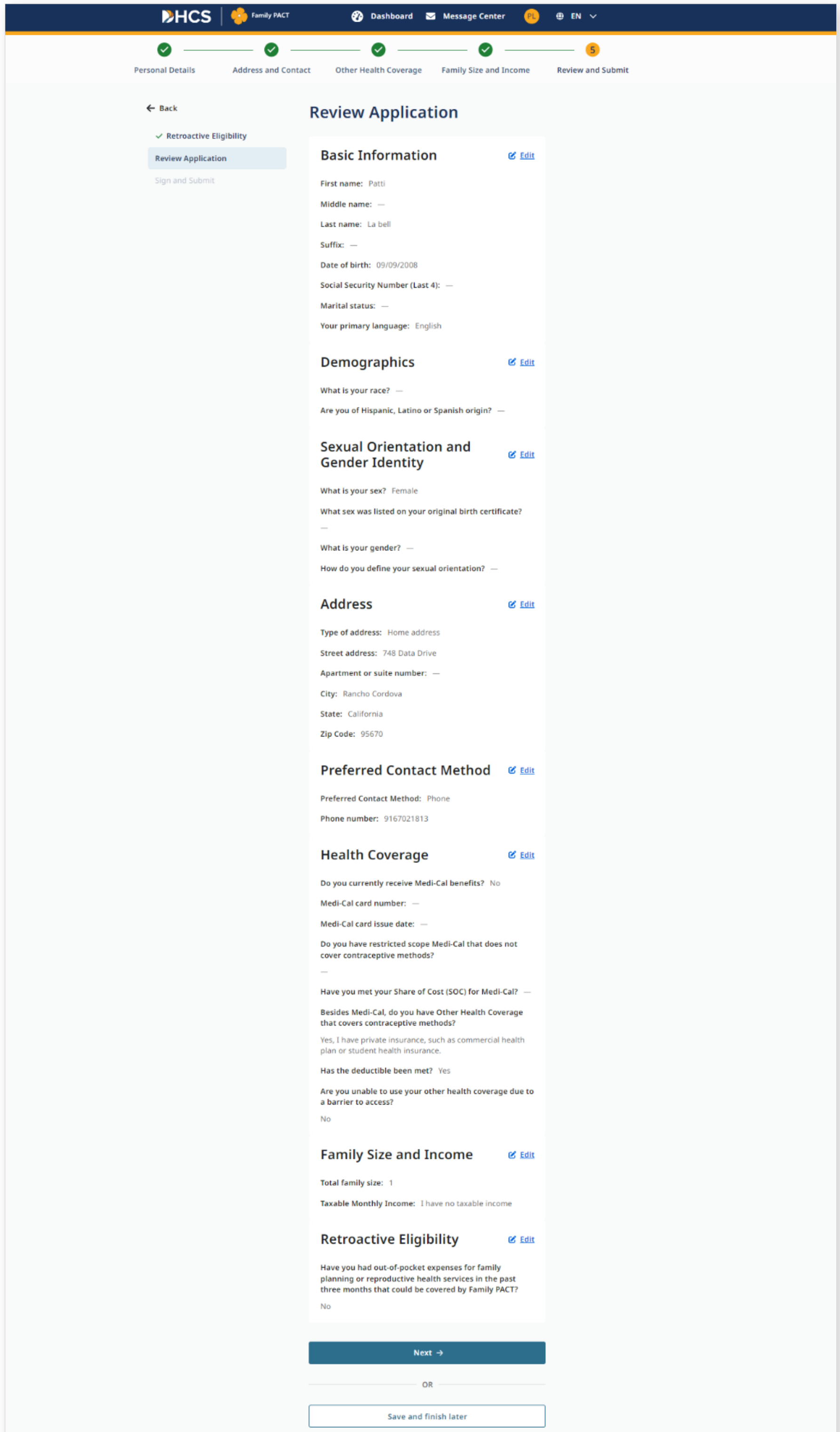


- Clicking the **What kind of family planning /reproductive health services does Family PACT cover?** link displays the *Family Planning or Reproductive Health Services* popup:
  - Clicking the **Medi-Cal** link navigates the Client to the Medi-Cal Providers website
  - Clicking the **Every Women Counts** link navigates the Client to the DHCS website
  - Clicking the **Covered California** link navigates the Client to the Covered California website
  - Clicking the **Ok** button closes the popup

Clicking the **Next** button on the *Retroactive Eligibility* page navigates the Client to the *Review Application* section.

Review Application

The *Review Application* page summarizes all information provided by the Client and allows the Client to edit and/or confirm the information entered.



The *Review Application* page displays each section of the Family PACT application.

- Clicking the **Edit** link next to a section allows the Client to update the corresponding section

Clicking the **Next** button allows the Client to sign and submit the application.

Sign and Submit

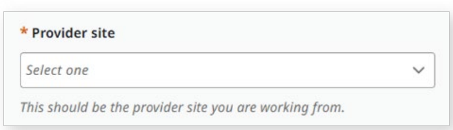
The *Sign and Submit* page displays a *Binding Arbitration Agreement*.

- Clicking the **Print** icon allows the Client to print the agreement

The Client is required to read and accept the terms by scrolling to the bottom and selecting the **I confirm that I have read and agree to the Binding Arbitration Agreement** checkbox.

The Client enters their eSignature in the ***Your eSignature*** field, certifying under penalty of perjury that they have read and understand the *Binding Arbitration Agreement*.

[**Note:** A *Provider site* dropdown displays for Provider Staff and Site Certifiers who are associated to more than one site location. Users are required to select the site location they are working from.]



Clicking the **Submit application** button submits the application and navigates the Client to the Client dashboard.