



California Healthcare Eligibility,
Enrollment, and Retention System



JOB AID: REPORT A CHANGE, RECERTIFY, REAPPLY, & DISCONTINUE

September 19, 2025

This Job Aid is intended for Provider Staff and Site Certifiers assisting Clients and illustrates how to complete a Report a Change (RAC), Recertify, and Reapply application for Family Planning, Access, Care, and Treatment (Family PACT) as well as the process to discontinue Family PACT coverage on behalf of the Client.

Eligibility is determined when a RAC, Recertify, or Reapply application is submitted. Family planning services eligibility is determined using the Client's age, California residency, insurance coverage, income, and medical necessity. Client's eligibility for coverage is for one year from the application submit date. Changes resulting in an eligibility redetermination may impact the Client's eligibility for coverage.

This job aid highlights the steps to complete common changes or complete the next available action:

- The Client utilizes the RAC application to make changes to their personal demographics and income information
- A recertification for the next benefit year needs to be completed within the last 60 days of the Client's coverage end date
- Clients that are Ineligible and have new information that may make them Eligible may reapply for coverage
- Clients may discontinue coverage at any time. Changes to the Client's eligibility criteria may also result in an ineligible determination

Next Steps Section

The Client Dashboard dynamically displays the next available action depending on the current case status:

- **Report a change** – When the Client is Eligible
- **Reapply** – When the Client is Ineligible
- **Recertify** – When the Client's eligibility end date is within 60 days
- **Continue** – When an application has been initiated but not yet submitted

The screenshot shows the HCS Family PACT Client Dashboard for Robert Smith. The dashboard has a dark blue header with the HCS logo, Family PACT logo, and navigation links for Dashboard, Message Center, and a user profile icon (RS). The main content area is white with a dark blue banner saying "Welcome, Robert!". Below the banner, there's a section for "Continue Reapply" with a "Continue" button and a "Cancel application" link. The "Continue Reapply" section also displays the user's name (Robert Smith), HAP ID (9000150526), and a message: "Continue reapply to update your application. This application will expire on 07/24/2025." There's also a "Need help?" section with a link to "Find a Certified Provider" and an "Apply for Insurance Affordability Program" section with a brief description.

Messaging displays the date by when the Client needs to submit the application.

The **Cancel application** link displays when an action has been initiated but not yet submitted and allows the user to cancel the application.

Report a Change

Clients needing to report a change to their household information use a RAC. The Client Dashboard with an Active status displays the next step action of **Report a change** making it easy for the Client to update the case.

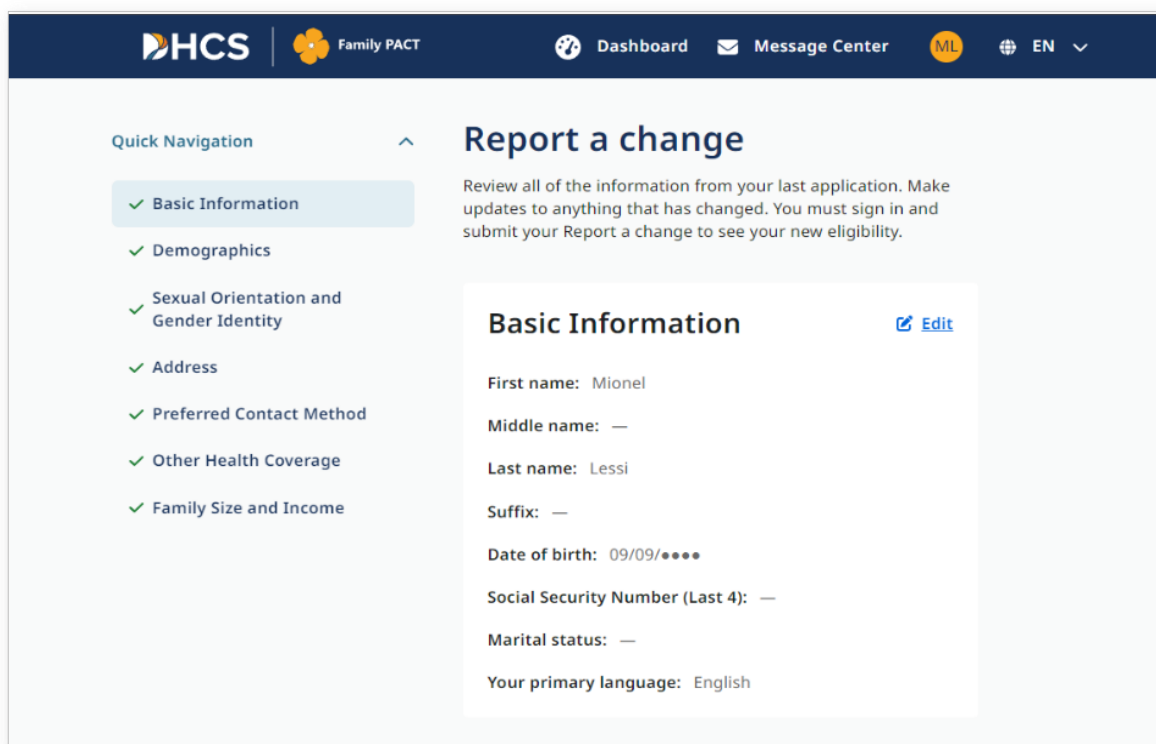
The screenshot shows the HCS Family PACT Client Dashboard for Peter Paul. The dashboard has a dark blue header with the HCS logo, Family PACT logo, and navigation links for Dashboard, Message Center, and a user profile icon (RS). The main content area is white with a dark blue banner saying "Welcome, Peter!". Below the banner, there's a "Coverage Status: Active" badge and a "View my HAP card" link. The "Coverage Status" section also displays the user's name (Peter Paul), HAP ID (9001461023), and coverage dates (08/30/2024 - 08/29/2025). There's a green checkmark icon and a message: "Great news! You are eligible for Family PACT! You can use your benefits starting 08/30/2024." Below this, there's a "Need to report something new?" section with a "Report a change" button and a message: "Report any changes that may affect your eligibility".

The *Report a change* page displays the previously submitted information and allows users to update the case information. The *Report a change* page displays client information in several sections.

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The **Quick Navigation** section navigates users to the respective section on the *Report a change* page:

- **Basic Information**
- **Demographics**
- **Sexual Orientation & Gender Identity**
- **Address**
- **Preferred Contact Method**
- **Other Health Coverage**
- **Family Size and Income**



HCS | **Family PACT** | **Dashboard** | **Message Center** | **ML** | **EN** ▾

Quick Navigation ▴

- ✓ **Basic Information**
- ✓ Demographics
- ✓ Sexual Orientation and Gender Identity
- ✓ Address
- ✓ Preferred Contact Method
- ✓ Other Health Coverage
- ✓ Family Size and Income

Report a change

Review all of the information from your last application. Make updates to anything that has changed. You must sign in and submit your Report a change to see your new eligibility.

Basic Information [Edit](#)

First name: Mionel

Middle name: —

Last name: Lessi

Suffix: —

Date of birth: 09/09/****

Social Security Number (Last 4): —

Marital status: —

Your primary language: English

An **Edit** link displays for each section allowing the user to add, remove or update information for that section.

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The application sections progress bar displays at the top of all pages in the RAC. Clicking an application section displays the corresponding section:

- A yellow circle with the section number indicates the current application section
- A green circle with a checkmark indicates a complete section

The screenshot shows the top navigation bar of the HCS Family PACT application. The progress bar at the top has five steps: 1. Personal Details (yellow circle with '1'), 2. Address and Contact (green circle with checkmark), 3. Other Health Coverage (green circle with checkmark), 4. Family Size and Income (green circle with checkmark), and 5. Review and Submit (green circle with '5'). Below the progress bar, the 'PERSONAL DETAILS' section is active, showing a list of sub-sections: Basic Information (checked), Demographics (checked), and Sexual Orientation and Gender Identity (checked). The 'Basic Information' sub-section is expanded, showing a form for 'First name'.

Additionally, a list of the pages within the section of the application display on the left for quick navigation. Blue highlight indicating the current page. Clicking the page name displays the corresponding page. This functionality exists on all pages within the RAC application.

Update Address Information

Clients needing to report an address change use the RAC application. Clicking the **Edit** link in the *Address* section of the Report a Change application displays the *Address* page. The *Address* page displays the existing address and contact information.

A blue banner displays *The Department of Health Care Services does not send mail to the address provided.* messaging.

A *What type of address is this?* displays with the following radio buttons:

- **Home address**
- **Mailing address**

Selecting a radio button dynamically displays the *Home address* or *Mailing address* section with the following:

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

The screenshot shows the 'ADDRESS AND CONTACT' section of the HCS Family PACT application. The progress bar at the top has five steps: 1. Personal Details (green circle with checkmark), 2. Address and Contact (yellow circle with '2'), 3. Health Coverage (green circle with checkmark), 4. Family Size and Income (green circle with checkmark), and 5. Review and Submit (green circle with '5'). Below the progress bar, the 'Address' sub-section is active. A blue banner at the top of the form area displays the message: 'The Department of Health Care Services does not send mail to the address provided.' Below the banner, there is a section titled 'What type of address is this?' with two radio buttons: 'Home address' (selected) and 'Mailing address'. Below this, the 'Home address' section is displayed with form fields for: 'Street Address' (2025 E. Biscay Way), 'Apartment or suite number' (Apt 17), 'City' (Rancho Cordova), 'State' (California), and 'Zip code' (95670). At the bottom of the form, there is an 'Update' button, an 'OR' separator, a 'Save and finish later' button, and a 'Cancel' button.

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- Clicking the **Update** button on the *Address* page displays the *Confirm Your Address* page where the user selects the **Recommended Address** or **Original Address** tile
 - Clicking the **Edit** link in the Original Address tile displays the *Address* page to edit the address
- Clicking the **Update** button on the *Confirm Your Address* page displays the *Report a change* page
- Clicking the **Save and finish later** button anywhere in the RAC application displays the *Save and finish later?* popup. The popup displays messaging to complete the application within 30 days
 - Clicking the **Save application** button saves the information, closes the popup, and navigates the user to the Client Dashboard
 - Clicking the **Cancel** button closes popup

The screenshot shows the 'Confirm Your Address' page within the HCS Family PACT application. The page has a dark blue header with the HCS logo, 'Family PACT', and navigation links for 'Dashboard', 'Message Center', and user information 'AB EN'. Below the header is a progress bar with five steps: 'Personal Details' (checked), 'Address and Contact' (active, marked with a '2'), 'Health Coverage' (checked), 'Family Size and Income' (checked), and 'Review and Submit' (marked with a '5'). The main content area is titled 'ADDRESS AND CONTACT' and 'Confirm Your Address'. It states, 'We found addresses that closely match the one you gave us.' and instructs the user to 'Choose the option that best matches your address or edit the original address.' There are two address tiles: 'Recommended Address' (5321 6th Ave, Sacramento, CA 95820) with a blue checkmark icon, and 'Original Address' (5321 6th Ave, Sacramento, California 95820) with an 'Edit' link. At the bottom, there are three buttons: 'Update' (blue), 'Save and finish later' (white with blue border), and 'Cancel' (blue with white text).

The screenshot shows a 'Save and finish later?' popup. The title is 'Save and finish later?'. The text inside says, 'You can save your application now and log in and finish it anytime within the next 30 days. After 30 days, your application will expire and you will need to start a new one.' At the bottom, there are two buttons: 'Save application' (blue) and 'Cancel' (blue with white text).

Change the Preferred Contact Method

The *Preferred Contact Method* page displays when clicking the **Edit** link on the *Report a Change* page. The user may update the existing *Preferred Contact Method*.

The *If we need to get in touch with you, how do you want us to contact you?* question displays with the following radio buttons:

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

A dynamic field displays to add or update the **Email address**, **Cell phone number** or **Phone number** based on the radio button selection.

The screenshot shows the 'Preferred Contact Method' page within the HCS Family PACT system. The page is part of a multi-step process, with 'Address and Contact' being the current step (indicated by a yellow circle with the number 2). The navigation bar at the top includes links for Dashboard, Message Center, and a language selector (EN). The main content area is titled 'ADDRESS AND CONTACT' and 'Preferred Contact Method'. It asks the user, 'If we need to get in touch with you, how do you want us to contact you?'. There are four radio button options: Email, Text, Phone, and Mail. The 'Phone' option is currently selected, indicated by a blue checkmark. Below the radio buttons, there is a text input field for the phone number, which currently contains '(989) 897-9797'. At the bottom of the form, there are two buttons: 'Update' and 'Save and finish later'. A 'Cancel' link is also present at the very bottom.

Change Family Size and Income

The *Your Family Size and Income* page displays when clicking the **Edit** link on the *Report a Change* page. The *Your Family Size and Income* page allows the user to add or update family members and make changes to income.

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

Which family members should you include?

If you are a tax filer

If you intend to file taxes and are not claimed as a dependent, please include your spouse if living together and your tax dependents (children).

If you are a tax dependent

If someone, such as your parents or your spouse, claims you on their taxes, list everyone on that person's tax form.

Ok

Note: The **+ Add family member** button is disabled and *A You have reached the maximum family size.* error displays when a user adds 19 family members.

FAMILY SIZE AND INCOME

Your Family Size and Income

List the family members who live with you (spouse and children). For each family member, list their taxable income. If you do not have any family members living with you, you can click "Update" and proceed to the next step.

[Which family members should you include?](#)

Robert Smith, 38
Self

Income Source	Taxable Monthly Income
Wages or salary	1200

[Edit](#)

Patrick Silva, 33
Parent

Income Source	Taxable Monthly Income
Wages or salary	3233

[Edit](#)

[Remove](#)

+ Add family member

Total

2
Household size

\$4433
Taxable Monthly Income

Update

OR

Save and finish later

Cancel

The *Edit Family Member* page displays the following when a user clicks the **Edit** link for a family member:

- The *Edit your family member's details* section displays the following previously saved family member information:
 - **First name** field
 - **Last name** field
 - *Relationship* dropdown
 - **Age** field
- The *Edit your family member's income* section displays the following previously saved information for the family member:
 - **What is included in taxable income?** link – Clicking the link displays the *What is included in taxable income?* popup
 - *Income Source* dropdown
 - **Taxable Monthly Income** field
 - **This family member has no taxable income** checkbox
- Clicking the **Save** button saves and closes the page

Edit Family Member

List the family members who live with you (spouse and children).
For each family member, list their taxable income.

[Which family members should you include?](#)

Edit your family member's details

* First name
Patrick

* Last name
Silva

* Relationship
Parent

* Age
33

Edit your family member's income

[What is included in taxable income?](#)

* Income Source
Wages or salary

* Taxable Monthly Income
\$ 3,233

OR

☐ This family member has no taxable income

Save

[Cancel](#)

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The **+ Add family member** button on the *Your Family Size and Income* page allows the user to add a family member and displays the following:

- **First Name** field
- **Last Name** field
- **Relationship** dropdown
- **Age** field

The *Add your family member's income* section displays:

- **What is included in taxable income?** link—
Clicking the link displays the *What is included in the taxable income?* popup
- **Income Source** dropdown
- **Taxable Monthly Income** field
- **This family member has no taxable income** checkbox
- Clicking the **Save** button displays the *Your Family Size and Income* page with the new [#] *Household size* and the \$[#] *Taxable Monthly Income* updates

Add Family Member

List the family members who live with you (spouse and children). For each family member, list their taxable income.

[Which family members should you include?](#)

Add your family member's details

* First name

* Last name

* Relationship

Select one

* Age

Add your family member's income

[What is included in taxable income?](#)

* Income Source

Select one

* Taxable Monthly Income

\$0,000

OR


☐ This family member has no taxable income

Save

Cancel

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- Clicking the **Update** button on the *Your Family Size and Income* page saves the change and displays the *Report a change* page
- A **Remove** link displays when there is more than one family member in the household. Clicking the Remove link displays the *Remove family member?* popup
 - Clicking the **Remove family member** button removes the family member and closes the popup
 - Clicking the **Cancel** button closes the popup



Remove family member?

Please confirm you would like to remove this family member. This action will delete their details and income data and cannot be undone.

Remove family memberCancel

The **Edit** link in the *[Client Name], [Age]* section allows the user to edit the Client's income while clicking the **Edit** link for a family member navigates the user to the *Edit Family Member* page where the income for other family members may be edited.

FAMILY SIZE AND INCOME

Your Family Size and Income

List the family members who live with you (spouse and children). For each family member, list their taxable income. If you do not have any family members living with you, you can click "Update" and proceed to the next step.

[Which family members should you include?](#)

Robert Smith, 39
Self

Income Source	Taxable Monthly Income
Wages or salary	1200

[Edit](#)

Patrick Silva, 33
Domestic partner or common law

Income Source	Taxable Monthly Income
Wages or salary	3233

[Edit](#)[Remove](#)

Lydia Silva, 5
Child

Income Source	Taxable Monthly Income
—	—

[Edit](#)[Remove](#)

+ Add family member

Total

3
Household size

\$4433
Taxable Monthly Income

Update

OR

Save and finish later

[Cancel](#)

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The *Your Income* page, for the Client, displays the following:

- *List your taxable income first, such as income that comes from employment, self-employment and social security. If you have income from more than one place, you can add up your income sources and provide one total monthly amount.*
- **What is included in taxable income?** link – Clicking the link displays the *What is included in taxable income?* popup
 - Clicking the **Ok** button closes the popup

What is included in taxable income?

☒ **Included**
Include these household income sources for individuals over 18:

- Wages
- Social Security
- Pensions
- Unemployment
- Alimony received

☐ **Not Included**
Do not include these income sources:

- Tax refunds
- One-time inheritance payments
- Scholarships for educational purposes
- Child support received
- Public assistance
- Alimony paid
- Money from selling property
- Withdrawals of bank deposits

Ok

- Client *[First and Last name]*
 - *Relationship*
 - *Age*
 - *Income Source* dropdown – Allows the user to change the income source
- The **Taxable Monthly Income** field displays the existing monthly taxable income and may be updated to the new income amount
- Clicking the **I have no taxable income** checkbox disables the *Income Source* dropdown and the **Taxable Monthly Income** field
- Clicking the **Update** button completes the update and closes the *Family Size and Income* section

FAMILY SIZE AND INCOME

Your Income

List your taxable income first, such as income that comes from employment, self-employment and social security. If you have income from more than one place, you can add up your income sources and provide one total monthly amount.

[What is included in taxable income?](#)

Robert Smith

Relationship
Self

Age
38

*** Income Source**
Wages or salary

*** Taxable Monthly Income**
\$ 1,200

OR

☐ I have no taxable income

Update

OR

Save and finish later

Cancel

- Clicking the **Ready to submit** button on the *Report a change* page navigates the user to the *Sign and Submit* page

Sign and Submit

The *Sign and Submit* page displays a *Binding Arbitration Agreement* that may be printed using the **Print** link. The user must confirm they have read and agree to the agreement by scrolling to the bottom of the agreement messaging and selecting the **I confirm that I have read and agree to the Binding Arbitration Agreement.** checkbox.

The *Sign* section displays the following required fields:

- [The *Provider site* dropdown when the user is associated with more than one site location]
- The **Your eSignature** field

Completing these fields certifies under penalty of perjury that they have read and understand the *Binding Arbitration Agreement*.

- Clicking the **Cancel application** button displays the *Cancel your application?* popup
- Clicking the **Submit** button submits the application and navigates the user to the Client Dashboard

The Client Dashboard displays with the current eligibility Family PACT status.

The screenshot shows the 'Sign and Submit' page, which is the final step in a five-step process (Personal Details, Address and Contact, Health Coverage, Family Size and Income, Review and Submit). The 'Review and Submit' step is highlighted with a yellow circle containing the number 5. On the left, a sidebar shows progress for 'Retroactive Eligibility', 'Review Application', and 'Sign and Submit' (which is selected). The main content area is titled 'SIGN YOUR APPLICATION' and 'Sign and Submit'. It includes a 'Binding Arbitration Agreement' section with a 'Print' link and a checkbox for 'I confirm that I have read and agree to the Binding Arbitration Agreement.' Below this is a 'Sign' section with a text box for the signature and a dropdown for 'Provider site'. At the bottom, there is a 'Date' field showing '07/28/2025', a large blue 'Submit' button, and a 'Cancel application' link.

The screenshot shows the 'Welcome, Peter!' client dashboard. At the top, it says 'Welcome, Peter!' and 'Coverage Status: Active' with a green pill. There is a 'View my HAP card' link. Below this, a green box contains a message: 'Great news! You are eligible for Family PACT! You can use your benefits starting 08/30/2024.' To the left, personal information is listed: Name (Peter Paul), HAP ID (9001461023), and Coverage dates (08/30/2024 - 08/29/2025). At the bottom, there is a section titled 'Need to report something new?' with the text 'Report any changes that may affect your eligibility' and a 'Report a change' button.

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Recertify and Reapply

The Client Dashboard displays the following when coverage is about to end or has ended:

- **Recertify** – Displays up to 60 days prior to the Client’s coverage end date. Clicking the **Recertify** button displays the *Recertify* page
- **Reapply** – Displays when the Client's status is Inactive. Clicking the **Reapply** button navigates the user to the *Reapply* page

Both the *Recertify* and *Reapply* pages follow the same functionality as the Report a Change application as outlined above.

The screenshot shows the HCS Family PACT Client Dashboard for a user named Jade. The top navigation bar includes the HCS logo, Family PACT icon, and links to Dashboard, Message Center, and a user profile icon. The main header says 'Welcome, Jade!' and shows 'Coverage Status: Inactive' with a 'View my HAP card' link. A message box states: 'You have discontinued your Family PACT coverage.' Below this, a 'Reapply for Family PACT' button is prominently displayed. To the left of the button, text reads: 'You may apply again for the Family PACT program if any information changes on your application form.' The left sidebar contains personal information: Name (Jade Bellingham), HAP ID (9000580824), Coverage dates (—), and a 'Need help?' link.

The screenshot shows the HCS Family PACT 'Reapply' page. The top navigation bar is identical to the dashboard. The left sidebar, titled 'Quick Navigation', lists sections: Basic Information, Demographics, Sexual Orientation and Gender Identity, Address, Preferred Contact Method, Other Health Coverage, and Family Size and Income. The main content area is titled 'Reapply' and includes a sub-header: 'Review all of the information from your last application. Make updates to anything that has changed. You must sign in and submit your Reapply to see your new eligibility.' The form consists of several sections, each with an 'Edit' link:
1. **Basic Information**: First name (Kaylor), Middle name (SS), Last name (Navas), Suffix (—), Date of birth (01/01/****), Social Security Number (Last 4: —), Marital status (—), and Your primary language (English).
2. **Demographics**: What is your race? (—) and Are you of Hispanic, Latino or Spanish origin? (—).
3. **Sexual Orientation and Gender Identity**: What is your sex? (Male), What sex was listed on your original birth certificate? (—), What is your gender? (—), and How do you define your sexual orientation? (—).
4. **Address**: Type of address (Mailing address), Street address (400 W 17th St), Apartment or suite number (333), City (California), State (California), and Zip Code (90078).
5. **Preferred Contact Method**: Preferred Contact Method (Phone) and Phone number (7999576576).
6. **Health Coverage**: Do you currently receive Medi-Cal benefits? (No), Medi-Cal card number (—), Medi-Cal card issue date (—), Do you have restricted scope Medi-Cal that does not cover contraceptive methods? (—), Have you met your Share of Cost (SOC) for Medi-Cal? (—), Besides Medi-Cal, do you have Other Health Coverage that covers contraceptive methods? (I do not know), Has the deductible been met? (—), and Are you unable to use your other health coverage due to a barrier to access? (—).
7. **Family Size and Income**: Total family size (1) and Taxable Monthly Income (I have no taxable income).
At the bottom, there is a 'Ready to submit' button, an 'OR' separator, a 'Save and finish later' button, and a 'Cancel update' link.

Discontinue from Family PACT

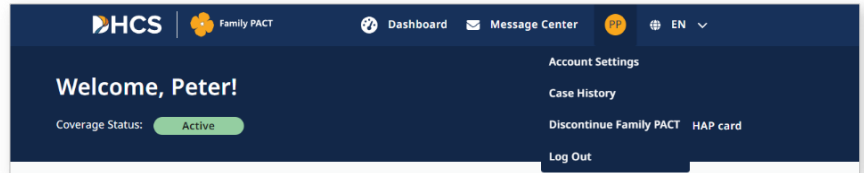
A Client or Admin user can end or discontinue Family PACT coverage. Clicking the **profile** icon in the Global header displays the **Discontinue Family PACT** option. Clicking the **Discontinue Family PACT** option navigates the user to the *Discontinue Family PACT* page.

The *Discontinue Family PACT* page displays reasons why the Client may be ending their Family PACT coverage and a reason is required to continue:

- **I no longer live in California**
- **I make over 200% of the Federal Poverty Guidelines**
- **I no longer have a medical necessity (sterilization)**
- **I have health insurance**
- **I have full scope Medi-Cal without Share of Cost**
- **Permanent deactivation due to a lost or stolen HAP card**

[**Note:** Users are required to select the site location. A *Provider site* dropdown displays when associated to more than one site.]

- Clicking the Continue button terminates coverage and displays an *Inactive* status with a blue banner message confirming Family PACT discontinuance
- Clicking the Cancel button cancels the discontinuance of coverage and closes the page

A screenshot of the "Discontinue Family PACT" form. The header is the same as the dashboard. The main content area has the title "Discontinue Family PACT" and a sub-header "Please choose a reason why you are discontinuing your Family PACT coverage. Once you submit, your coverage will be discontinued immediately." Below this is a section titled "Why are you leaving the Family PACT Program?" with six radio button options: "I no longer live in California", "I make over 200% of the Federal Poverty Guidelines", "I no longer have a medical necessity (sterilization)", "I have health insurance", "I have full scope Medi-Cal without Share of Cost", and "Permanent deactivation due to a lost or stolen HAP card". At the bottom, there are "Continue" and "Cancel" buttons.A screenshot of a dropdown menu titled "Provider site". The menu has a "Select one" option and a downward arrow. Below the dropdown, there is a note: "This should be the provider site you are working from."