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

California Healthcare Eligibility, Enrollment, and Retention System

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.

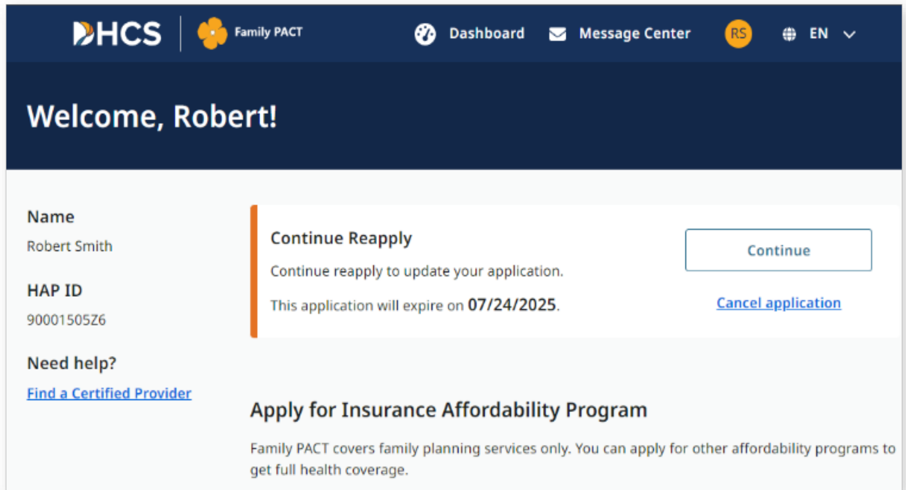
This job aid highlights the steps to complete common changes or complete the next available action:

- 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

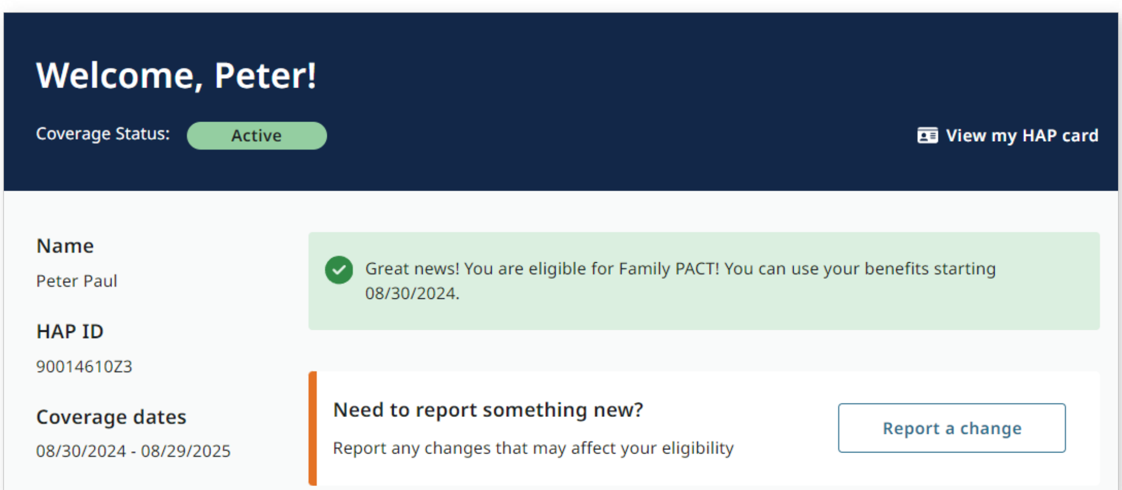


Messaging displays the date by when the Client needs to submit the application.

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

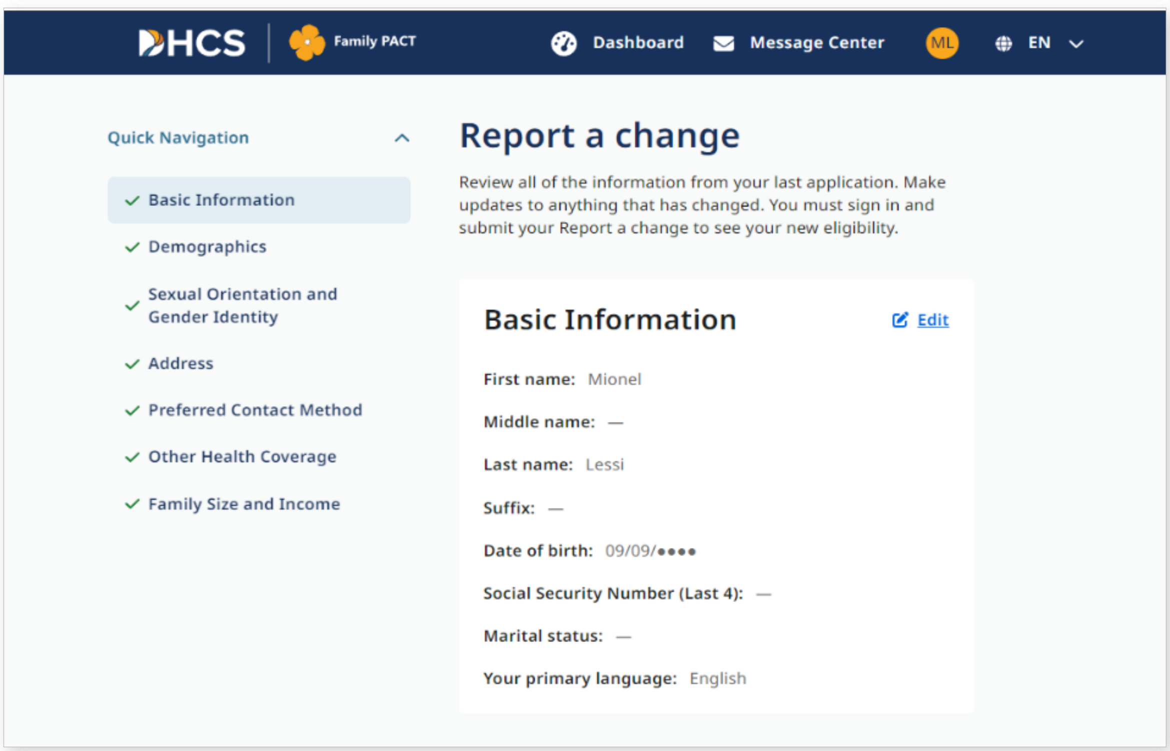
Clients needing to report a change to their household information use a RAC. The Client Dashboard with an Active status displays the next step action of **Report a change** making it easy for the Client to update the case.



The *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.

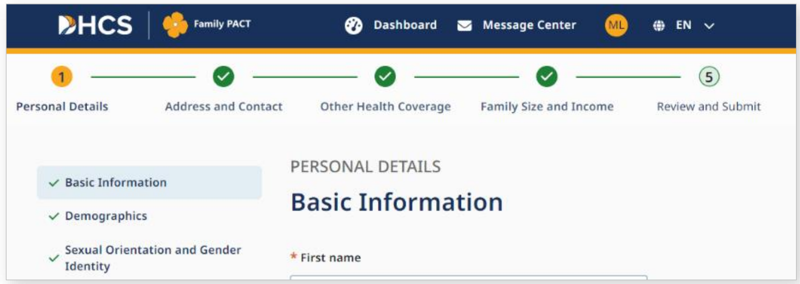
The **Quick Navigation** section navigates users to the respective section on the *Report a change* page:

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



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

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

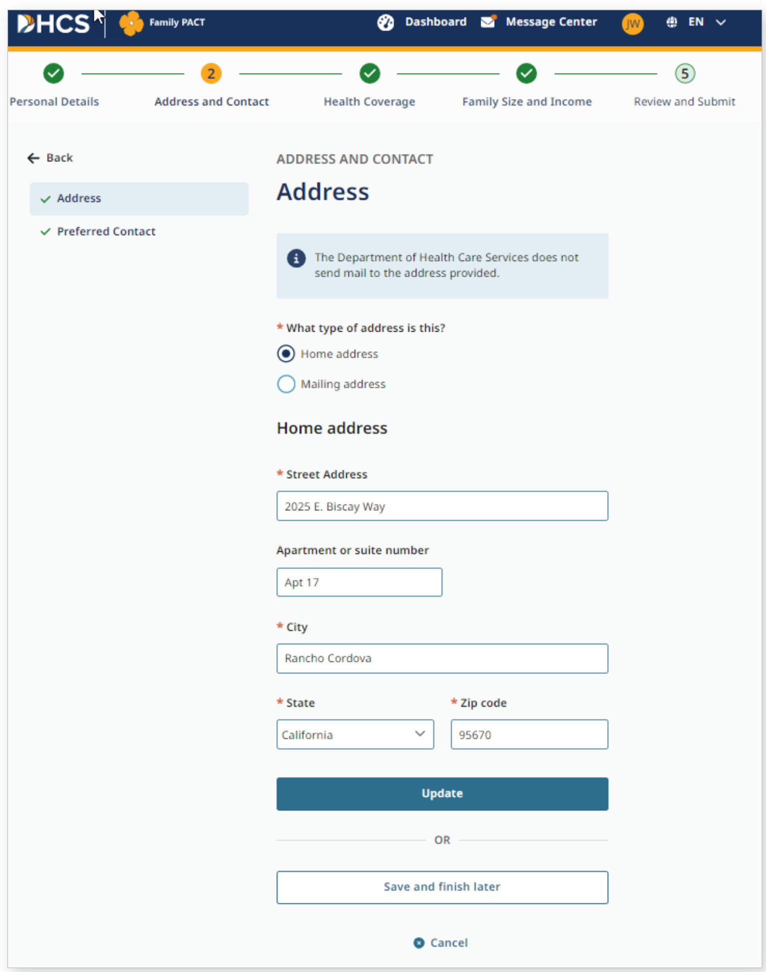


- A yellow circle with the section number indicates the current application section
- A green circle with a checkmark indicates a complete section

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.

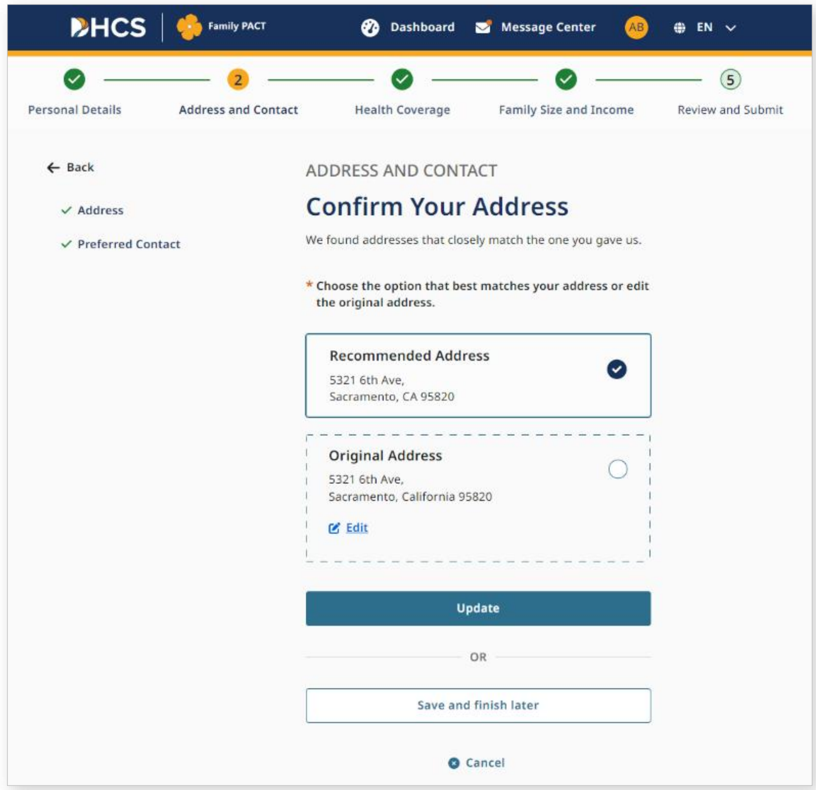
A *What type of address is this?* displays with the following radio buttons:

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

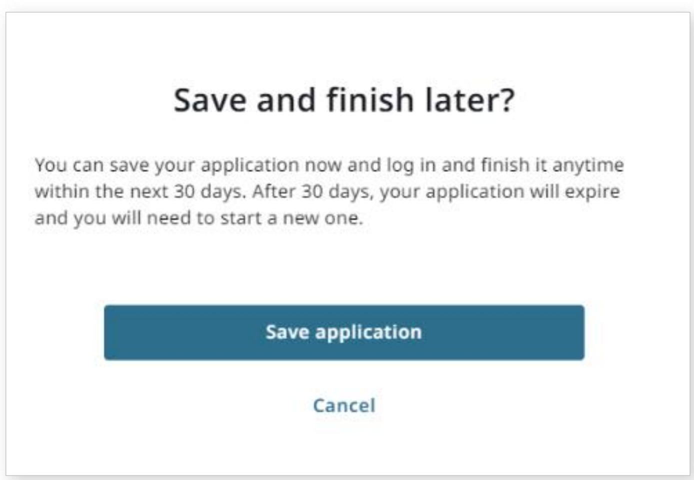
  Selecting a radio button dynamically displays the *Home address* or *Mailing address* section with the following:

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

- 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



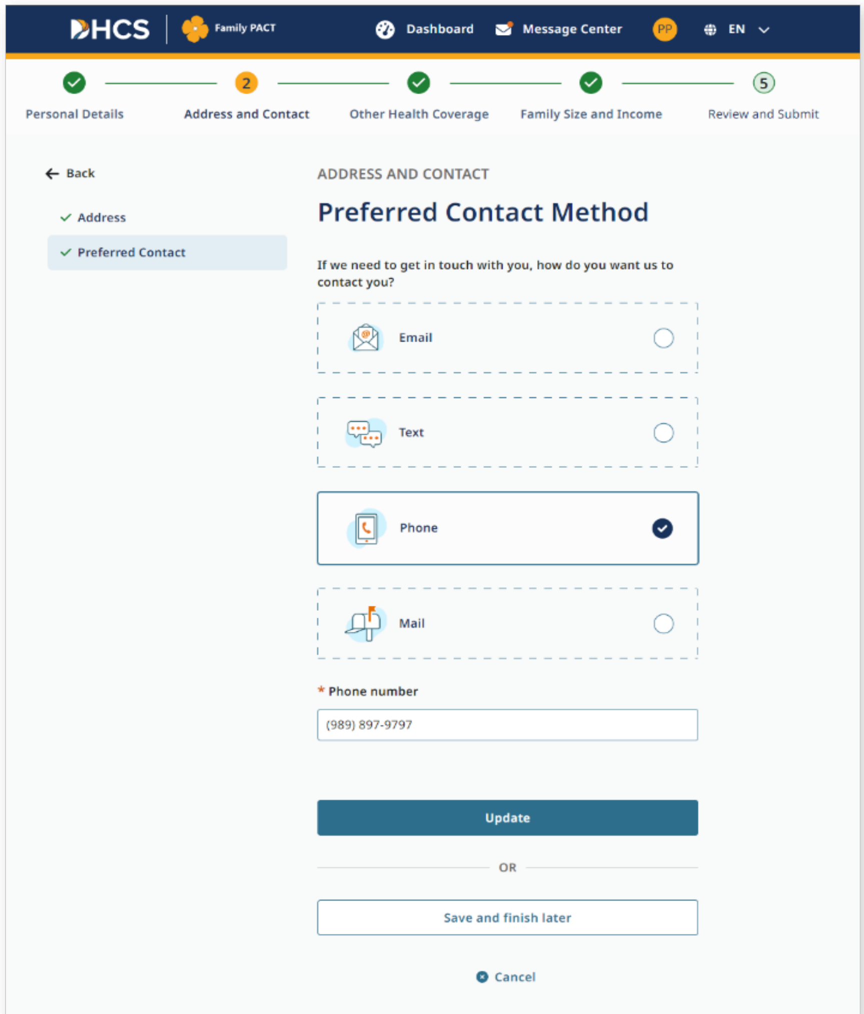
Change the Preferred Contact Method

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**

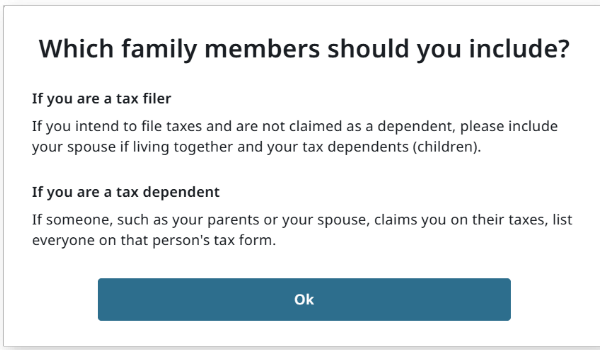
A dynamic field displays to add or update the **Email address**, **Cell phone number** or **Phone number** based on the radio button selection.



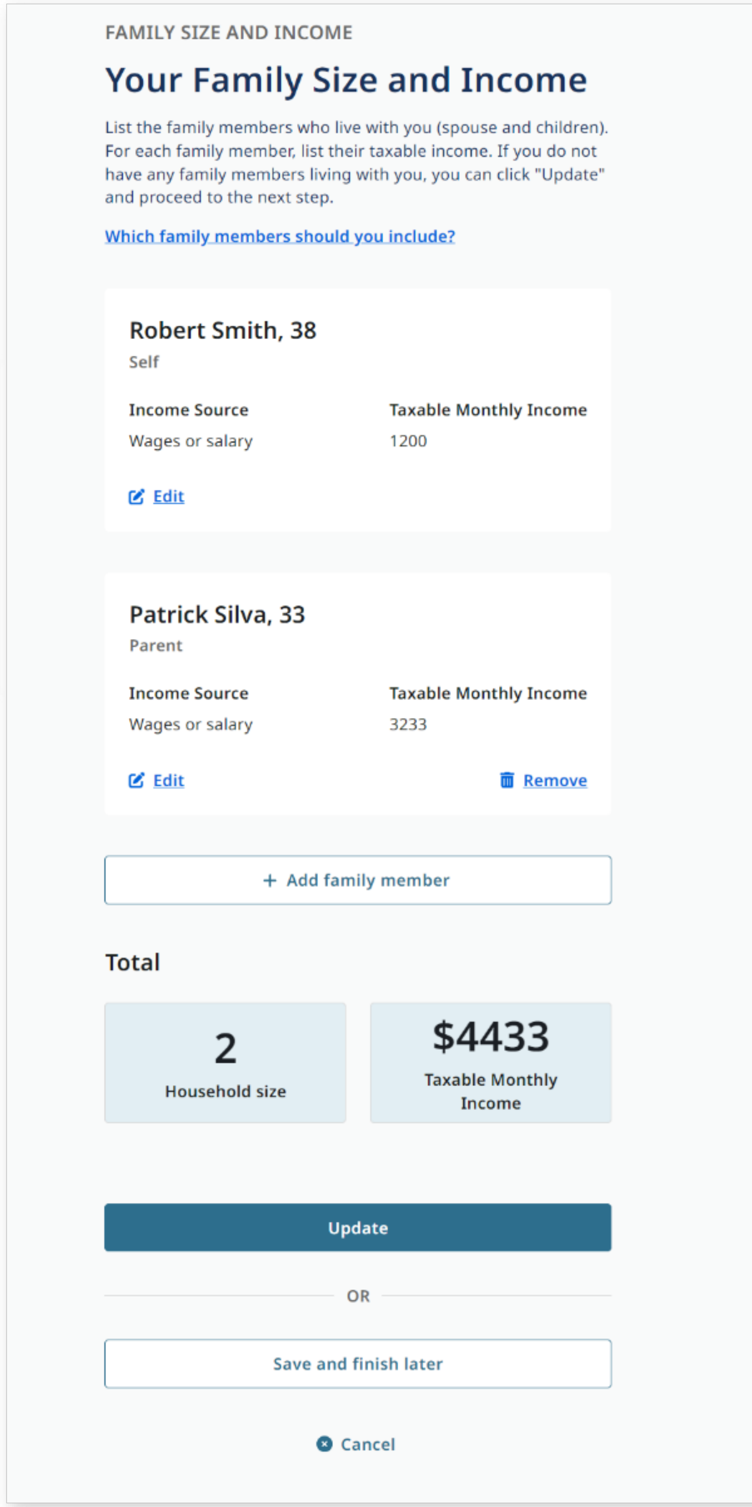
Change Family Size and Income

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

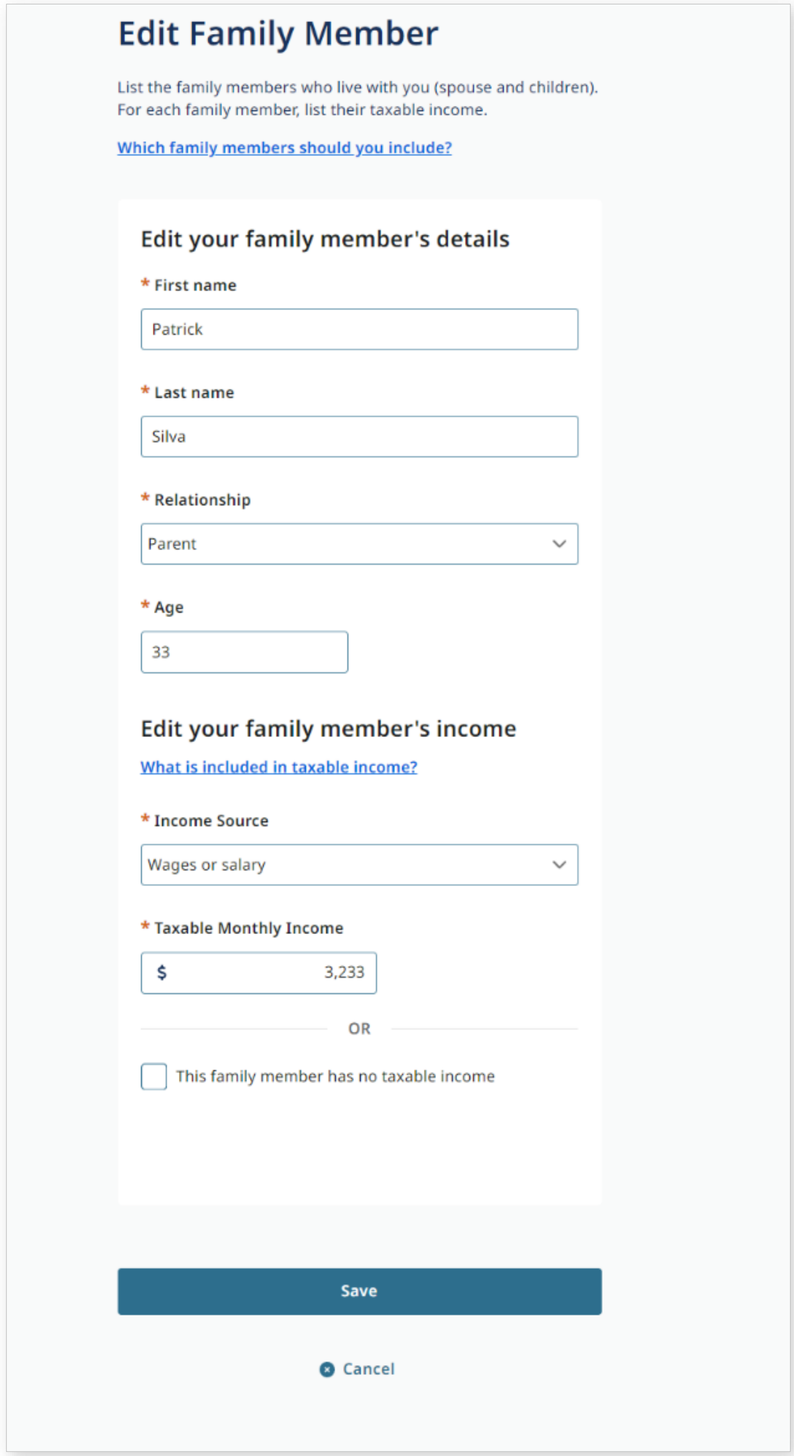


Note: The **+ Add family member** button is disabled and *A You have reached the maximum family size.* error displays when a user adds 19 family members.



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

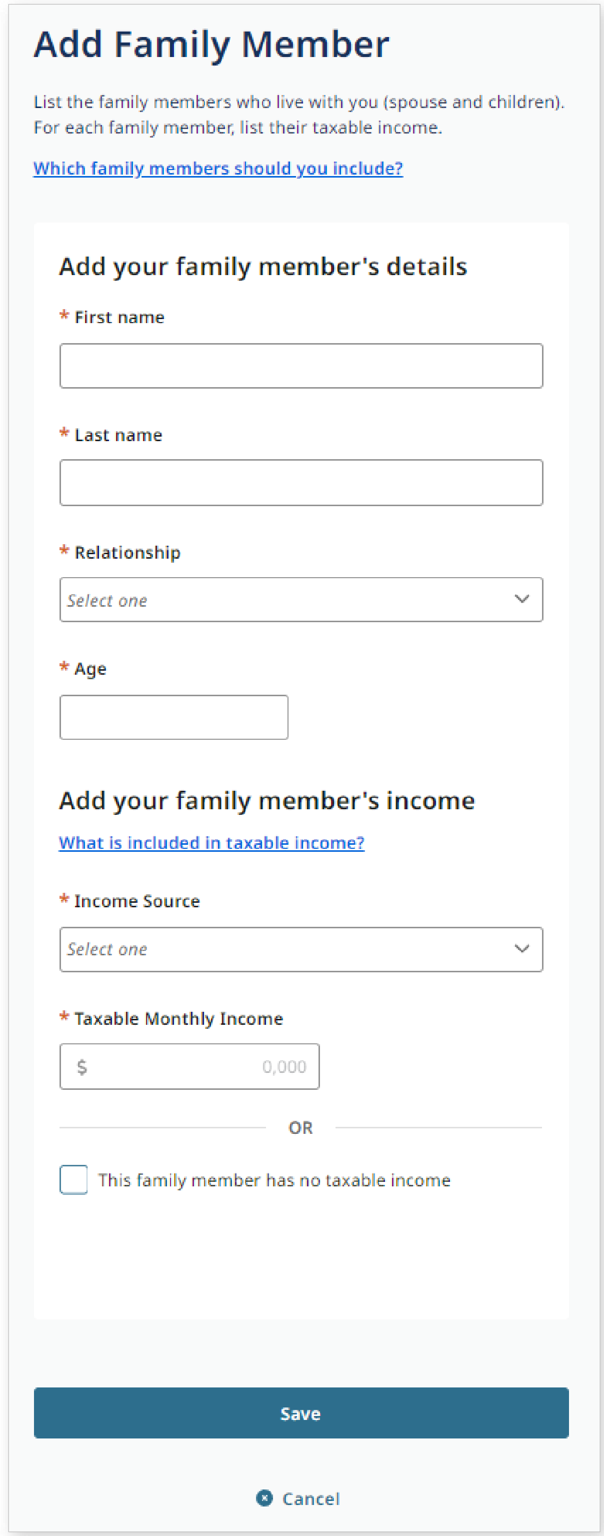


The **+ Add family member** button on the *Your Family Size and Income* page allows the user to the add a family member and displays the following:

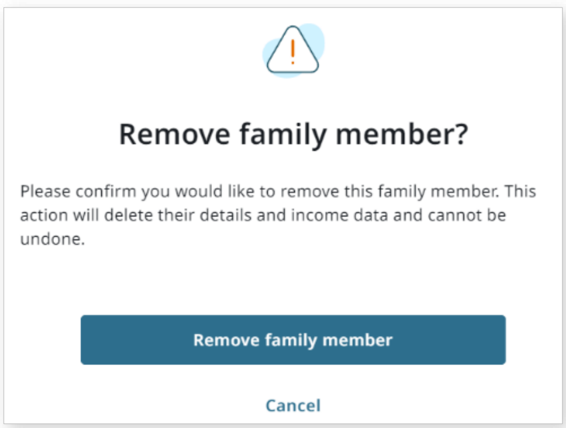
- **First Name** field
- **Last Name** field
- *Relationship* **dropdown**
- **Age** field

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

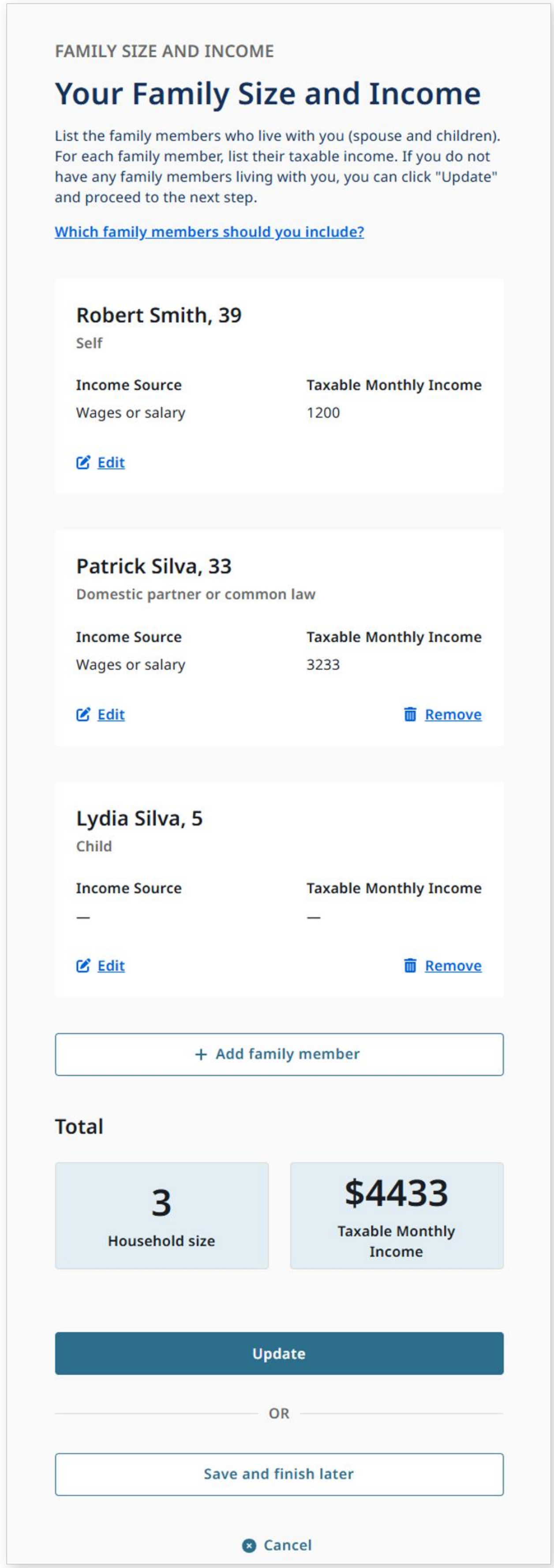
- **What is included in taxable income**? link– Clicking the link displays the *What is included in the taxable income?* popup
- *Income Source* dropdown
- **Taxable Monthly Income** field
- **This family member has no taxable income** checkbox
- Clicking the **Save** button displays the *Your Family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



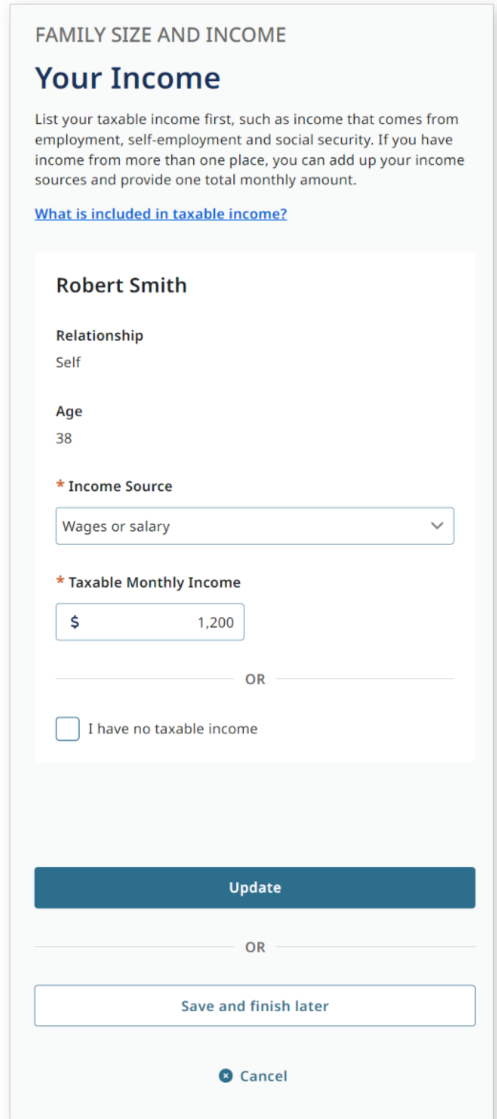
- Clicking the **Update** button on the *Your Family Size and Income* page saves the change and displays the *Report a change* page
- A **Remove** link displays when there is more than one family member in the household. Clicking the Remove link displays the *Remove family member?* popup
    - Clicking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



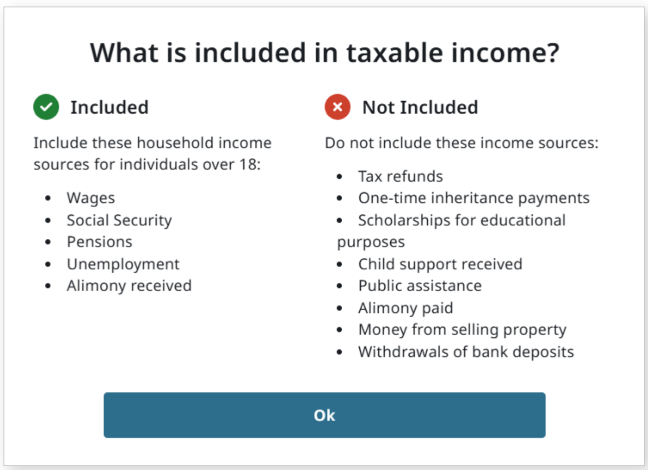
The **Edit** link in the *[Client Name]*, *[Age]* section allows the user to edit the Client's income while clicking the **Edit** link for a family member navigates the user to the *Edit Family Member* page where the income for other family members may be edited.



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

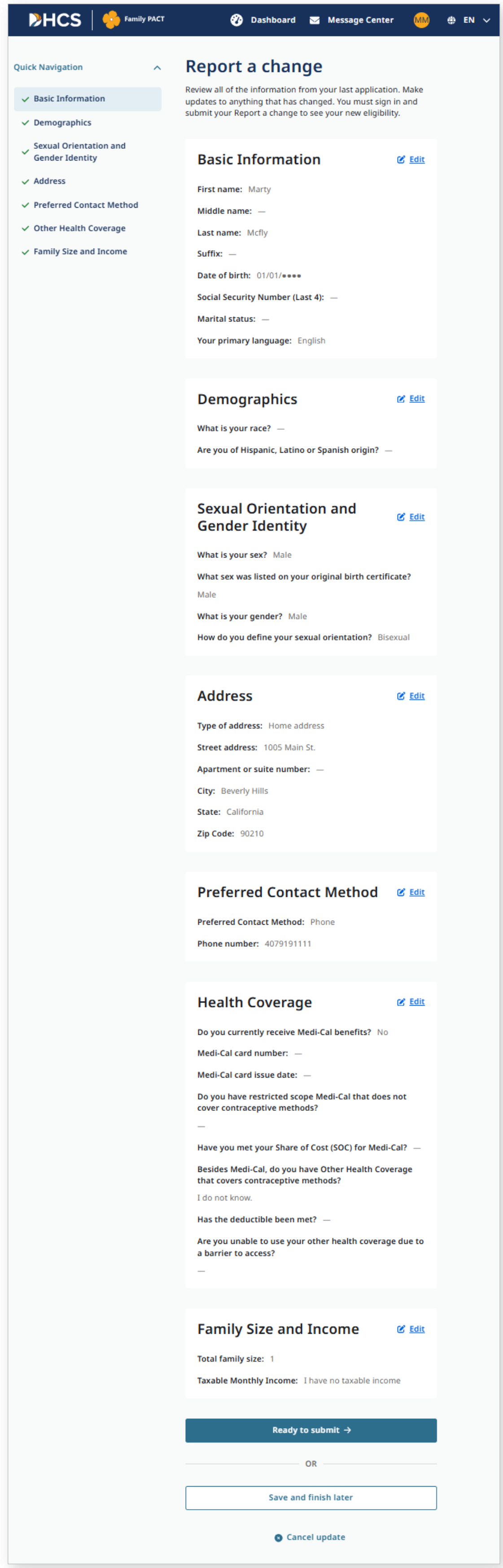


- Client *[First and Last name]*
  - *Relationship*
  - *Age*
  - *Income Source* dropdown – Allows the user to change the income source
- The **Taxable Monthly Income** field displays the existing monthly taxable income and may be updated to the new income amount
- Clicking the **I have no taxable income** 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

Review and Submit

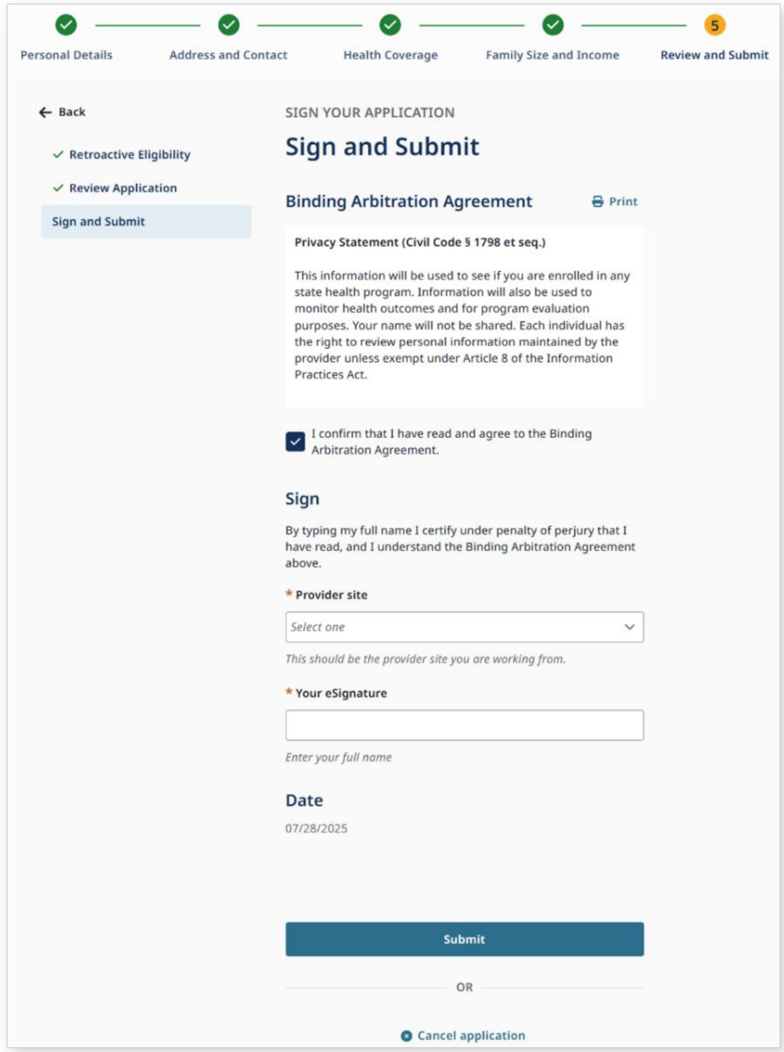
The *Report a change* page displays the changes and allows the user to confirm the information before submitting.

- 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.



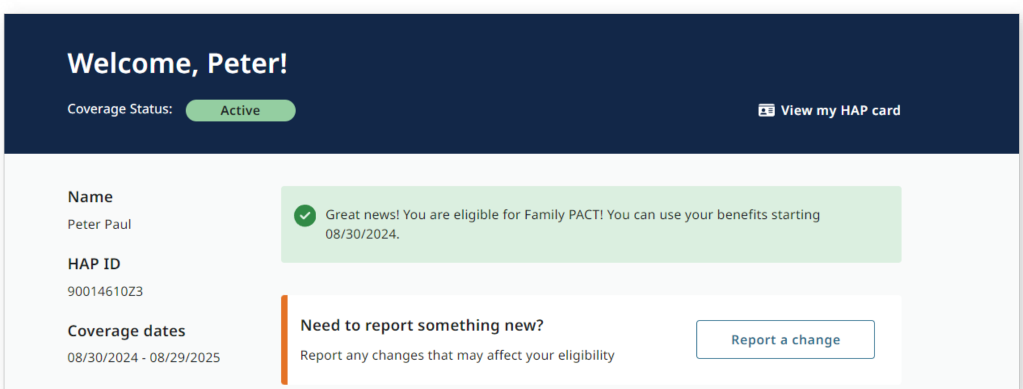
The *Sign* section displays the following required fields:

- [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.

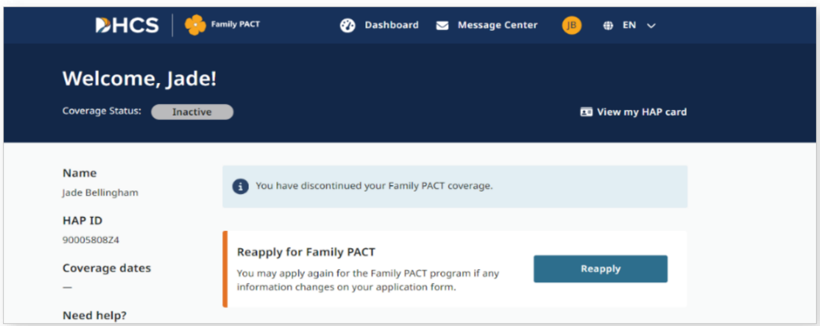


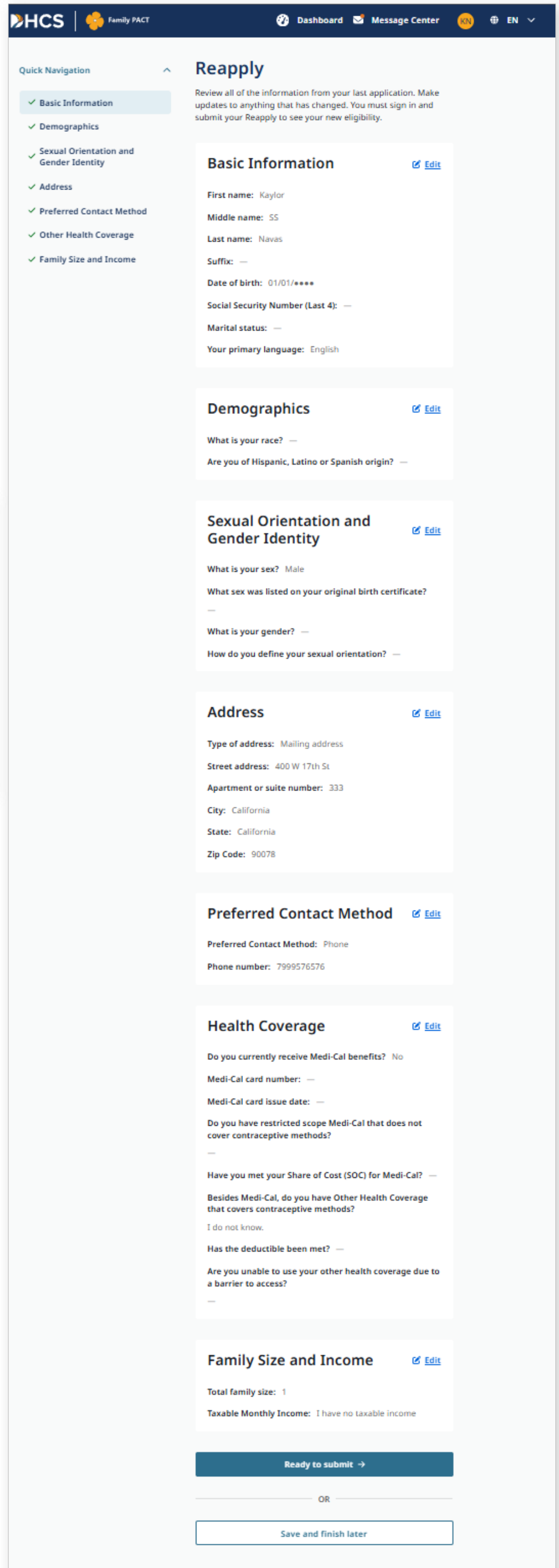
Recertify and Reapply

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

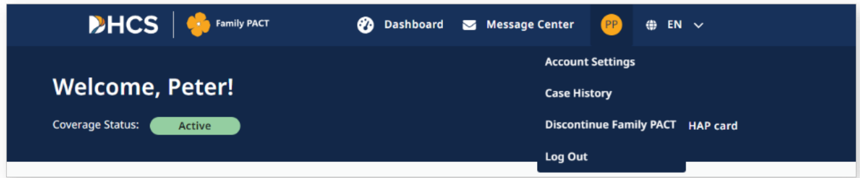
Both the *Recertify* and *Reapply* pages follow the same funcationality as the Report a Change application as outlined above.





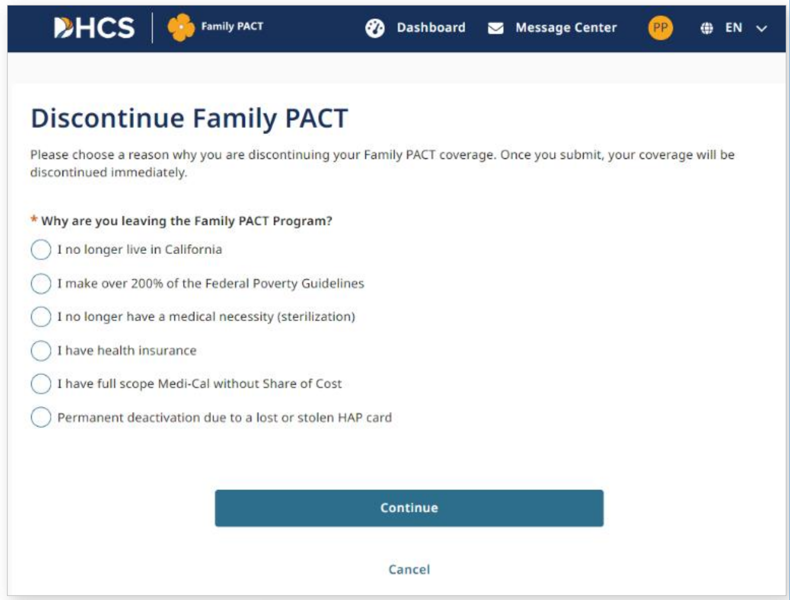
Discontinue from Family PACT

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.

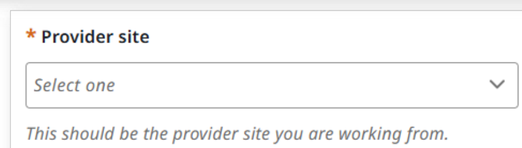


The *Discontinue Family PACT* page displays reasons why the Client may be ending their Family PACT coverage and a reason is required to continue:

- **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