JOB AID: SITE CERTIFIER ACCOUNT CREATION

California Healthcare Eligibility, Enrollment, and Retention System

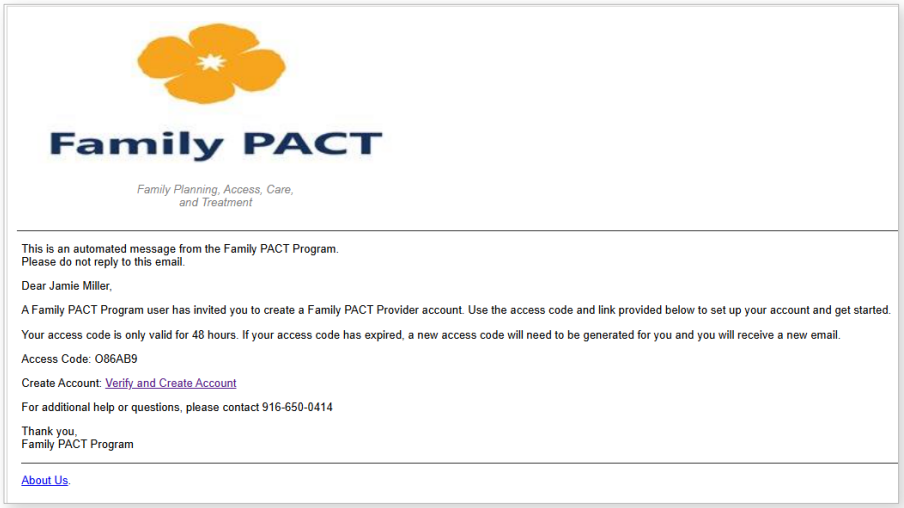
November 3, 2025

This Job Aid is intended for Site Certifiers and illustrates how to complete the Family Planning, Access, Care, and Treatment (Family PACT) account creation process.

Confirming Site Access

Site Certifiers receive a Family PACT invitation email with the Subject: *Create Your Family PACT Account – Action Needed*. The invitation email is created for Site Certifiers when the Super Admin adds a site certifier to a Site location. This invitation email includes an access code and a **Verify and Create Account** link for the user to create their account. Clicking the **Verify and Create Account** link in the email navigates the user to the *Confirm Site Access* page.

The *Confirm Site Access* page displays for Site Certifiers to begin creating an account.



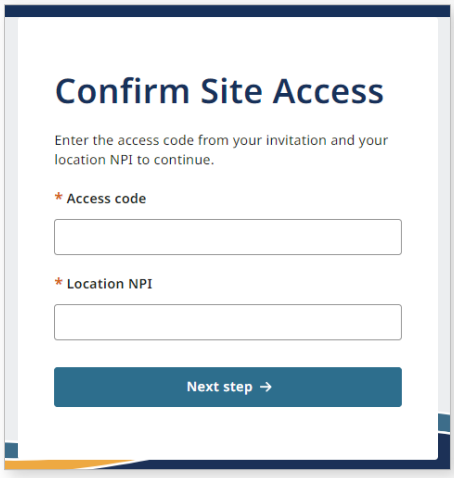
- Entering the access code, included in the email, in the **Access code** field is required

  Note: Error messaging displays when the access code is not entered correctly or expired. Access codes expire after [48] hours.

- Entering the National Provider Identifier (NPI) location number in the **Location NPI** field is also required

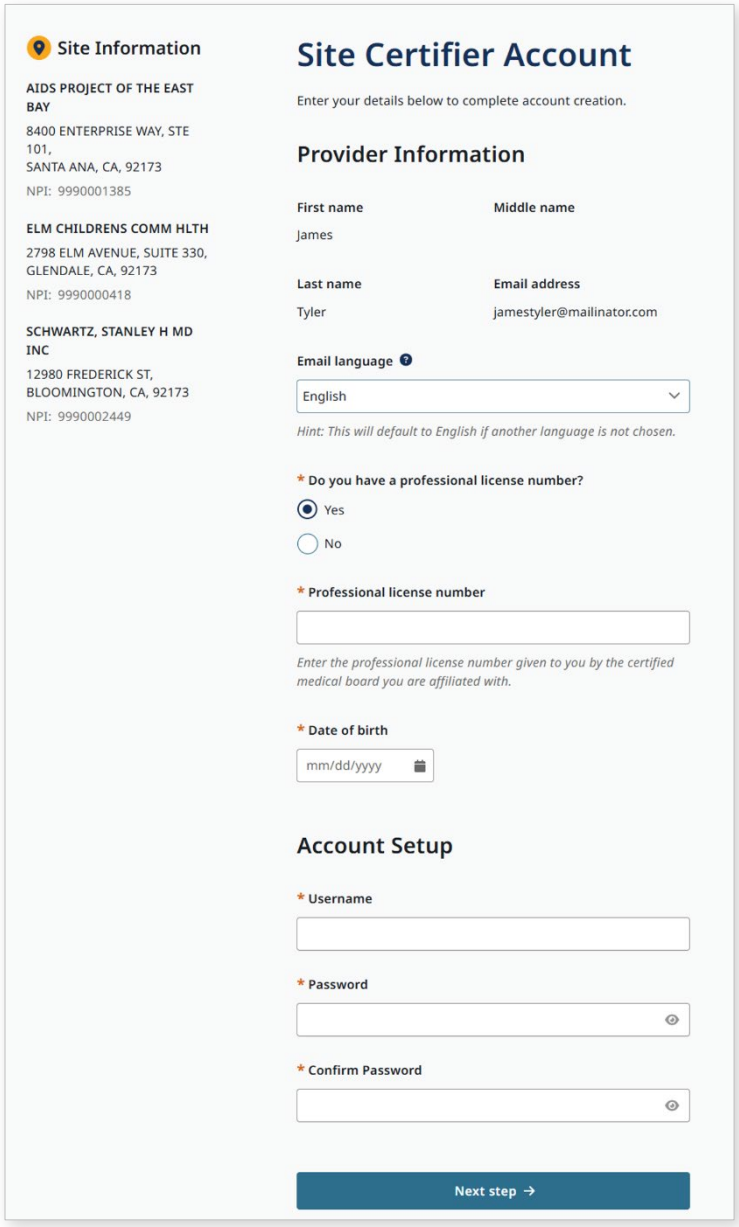
  Note: Error messaging displays when the **Location NPI** is invalid or does not match the access code.

- Clicking the **Next step** button navigates Site Certifiers to the *Site Certifier Account* page



Site Certifier Account Creation

The *Site Certifier Account* page displays the following pre-populated information entered as part of the initial account creation process:



- *Site Information* –Displays all site locations associated with the Site Certifier:
  - *Site name*
  - *Site address*
  - *NPI*
- *Provider Information:*
  - *First name*
  - *Middle name*
  - *Last name*
  - *Email address*

Site Certifiers are required to complete the account setup process to be able to log in to Family PACT. The following steps illustrate the process:

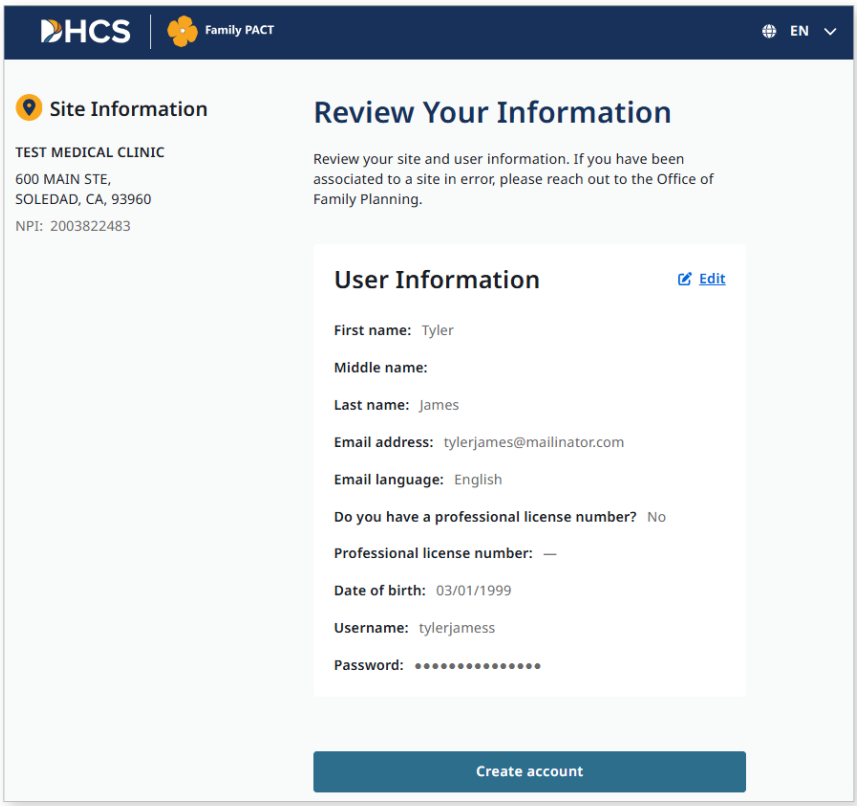
1. Select a language from the *Email language* dropdown.

   Note: **English** is the default selection.

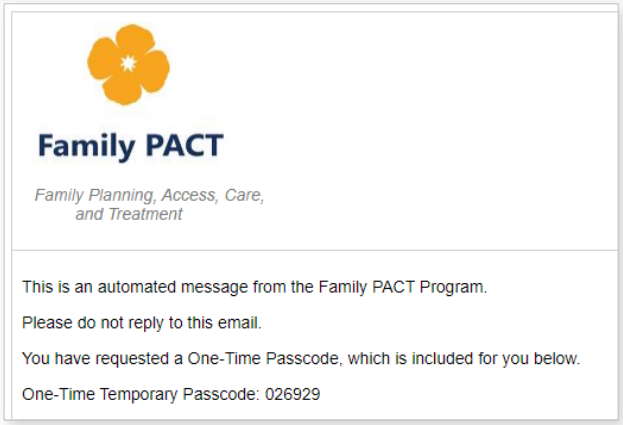
2. Select a radio button option for the *Do you have a professional license number?* question.
   - Clicking the **Yes** radio button dynamically displays the **Professional license number** field. Users are required to enter a professional license number to proceed
   - Clicking the **No** radio button allows the Site Certifier to proceed with account creation without entering a professional license number
3. Enter a date in the **Date of birth** field or click the **calendar** icon to display a calendar for date selection.
4. Complete the following fields in the *Account Setup* section:

- **Username**
- **Password**
- **Confirm Password**

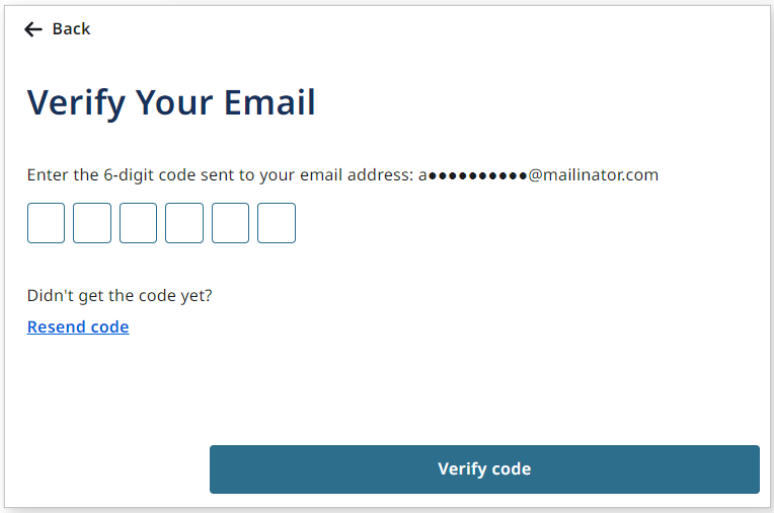
5. Click the **Next step** button on the *Site Certifier Account* page. The *Review Your Information* page displays allowing the Site Certifier to confirm their information before creating the account.
    - Clicking the **Edit** link allows the user to edit the information before creating the account
6. Click the **Create account** button on the *Review your Information* page. The *Verify Your Email* page displays.



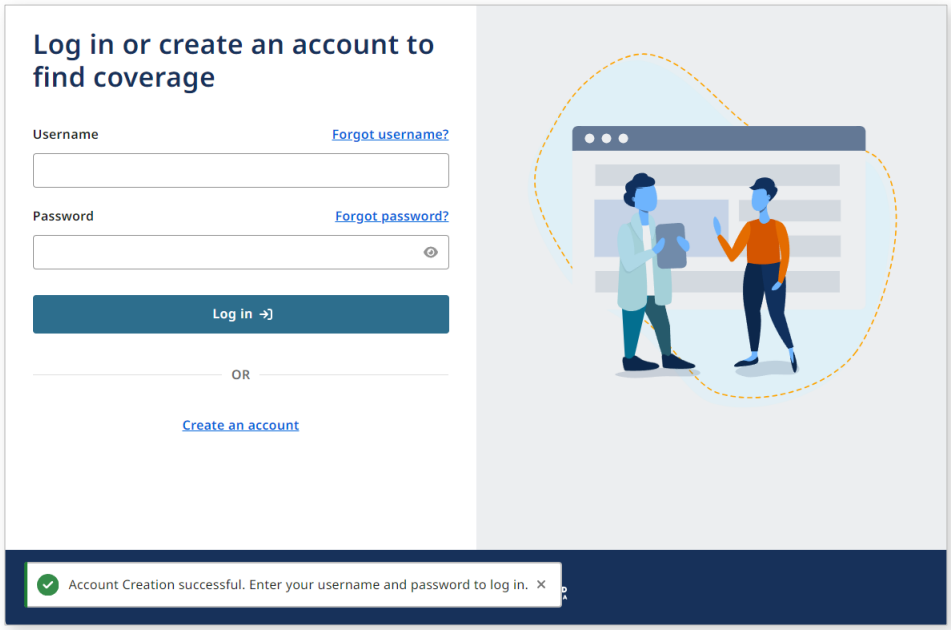
The Site Certifier receives an email with a *One-Time Temporary Passcode/*Verify code, also known as an OTP, to verify their account on the *Verify Your Email* page. [OTP is valid for 15 minutes.]



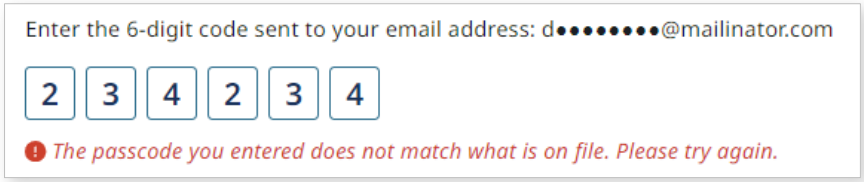
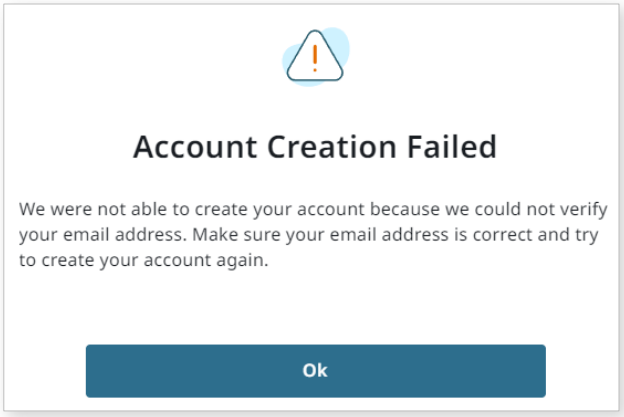
7. Enter the OTP on the *Verify Your Email* page.
    - Clicking the **Resend code** link sends a new OTP
8. Click the **Verify code** button. The *Log in or create an account to find coverage* page displays.



An *Account Creation successful. Enter your username and password to log in.* message displays on the bottom of the *Log in or create an account to find coverage* page confirming the account creation was successful.



Note: Error messaging displays when the passcode entered does not match the passcode on file.



- Clicking the **Verify code** button after five incorrect OTP attempts displays the *Account Creation Failed* popup with messaging indicating the Site Certifier's account creation failed
    - Clicking the **Ok** button closes the popup and navigates the user to the *Confirm Site Access* page to restart the account setup process