



California Healthcare Eligibility,  
Enrollment, and Retention System



## JOB AID: SITE CERTIFIER ACCOUNT CREATION

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.

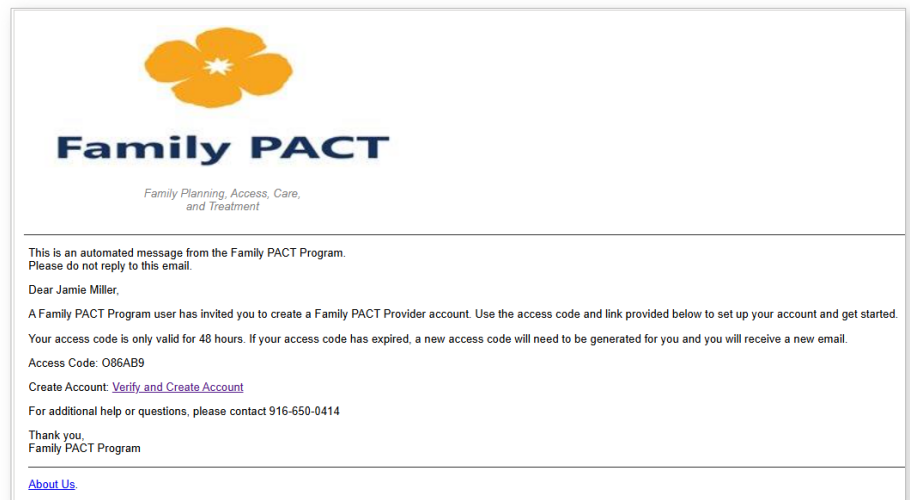
- Entering the access code, included in the email, in the **Access code** field is required

**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



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### 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:

The screenshot shows a web form titled "Site Certifier Account" with a subtitle "Enter your details below to complete account creation." The form is divided into two main sections: "Site Information" and "Provider Information".

**Site Information:** This section contains pre-populated text for three different sites. The first site is "AIDS PROJECT OF THE EAST BAY" with address "8400 ENTERPRISE WAY, STE 101, SANTA ANA, CA, 92173" and NPI "9990001385". The second site is "ELM CHILDRENS COMM HLTH" with address "2798 ELM AVENUE, SUITE 330, GLENDALE, CA, 92173" and NPI "9990000418". The third site is "SCHWARTZ, STANLEY H MD INC" with address "12980 FREDERICK ST, BLOOMINGTON, CA, 92173" and NPI "9990002449".

**Provider Information:** This section contains fields for the provider's details. The "First name" field is pre-populated with "James". The "Middle name" field is empty. The "Last name" field is pre-populated with "Tyler". The "Email address" field is pre-populated with "jamestyler@mailinator.com". The "Email language" dropdown menu is set to "English". Below this is a hint: "Hint: This will default to English if another language is not chosen." There are two radio buttons for the question "Do you have a professional license number?": "Yes" (selected) and "No". Below this is a text field for the "Professional license number" with a hint: "Enter the professional license number given to you by the certified medical board you are affiliated with." There is a "Date of birth" field with a placeholder "mm/dd/yyyy" and a calendar icon.

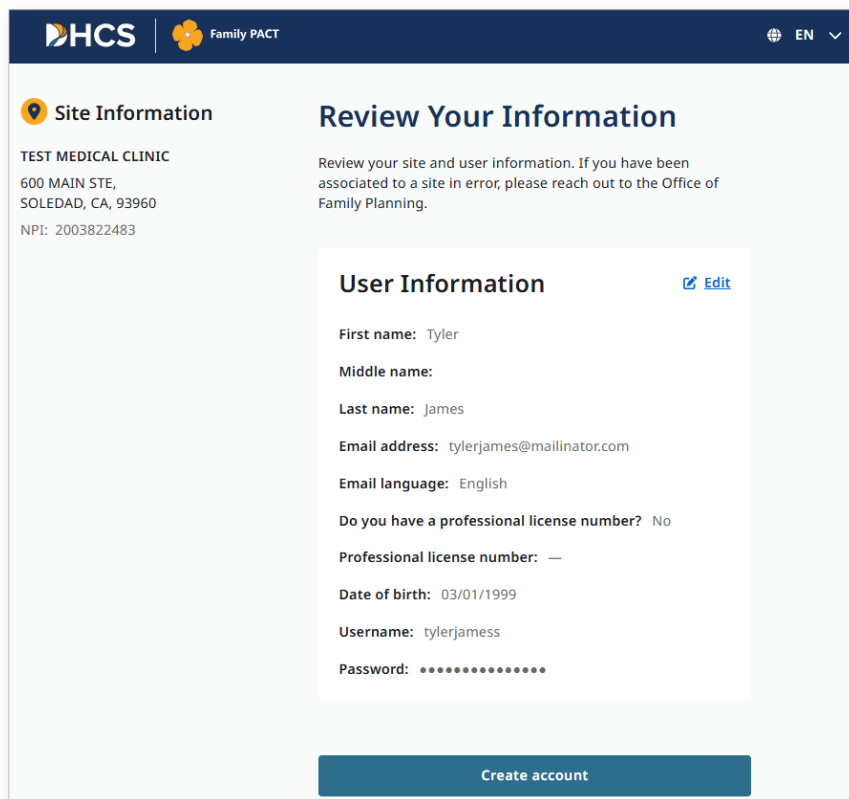
**Account Setup:** This section contains three required fields: "Username", "Password", and "Confirm Password". Each field has a corresponding input box. At the bottom of the form is a blue button labeled "Next step →".

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- **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.



**HCS** | **Family PACT** EN

**Site Information**

TEST MEDICAL CLINIC  
600 MAIN STE,  
SOLEDAD, CA, 93960  
NPI: 2003822483

**Review Your Information**

Review your site and user information. If you have been associated to a site in error, please reach out to the Office of Family Planning.

**User Information** [Edit](#)

First name: Tyler  
Middle name:  
Last name: James  
Email address: tylerjames@mailinator.com  
Email language: English  
Do you have a professional license number? No  
Professional license number: —  
Date of birth: 03/01/1999  
Username: tylerjames  
Password: ••••••••••

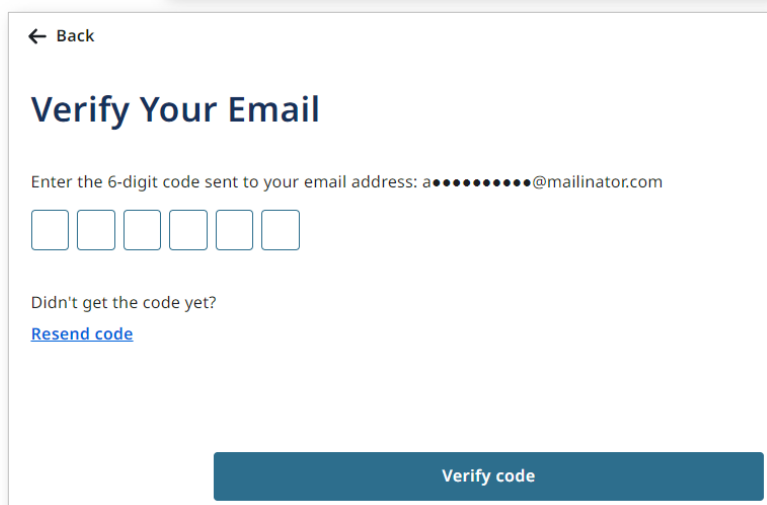
**Create account**



**Family PACT**  
Family Planning, Access, Care,  
and Treatment

This is an automated message from the Family PACT Program.  
Please do not reply to this email.

You have requested a One-Time Passcode, which is included for you below.  
One-Time Temporary Passcode: 026929



[← Back](#)

**Verify Your Email**

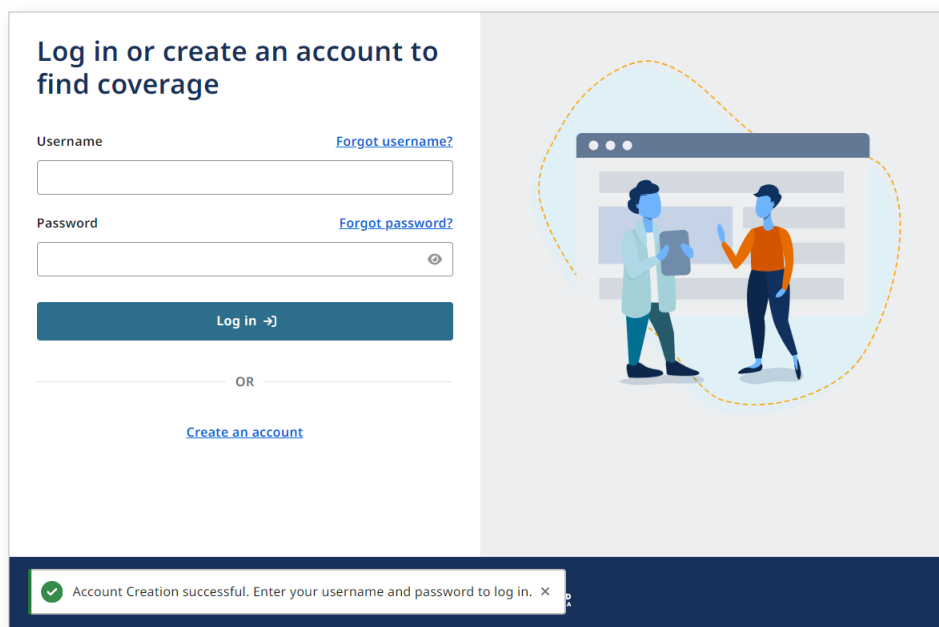
Enter the 6-digit code sent to your email address: a••••••••@mailinator.com

Didn't get the code yet?  
[Resend code](#)

**Verify code**

## JOB AID: SITE CERTIFIER ACCOUNT CREATION

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

Enter the 6-digit code sent to your email address: d.....@mailinator.com

2 3 4 2 3 4

❗ The passcode you entered does not match what is on file. Please try again.

