

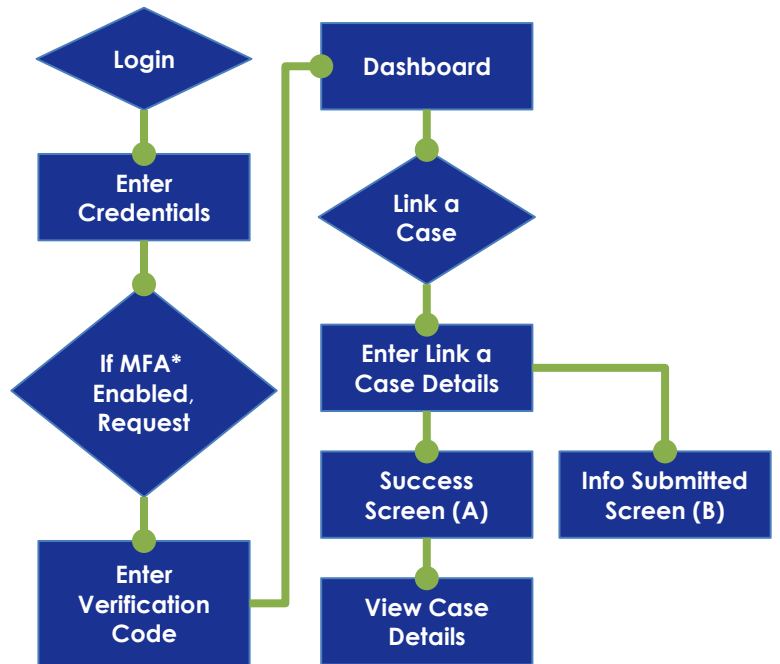
## BenefitsCal | Quick Guide: Link to Case

### Purpose

The purpose of this BenefitsCal Quick Guide is to provide instructions to County workers to help customers to login and link their account to a case. Once the case is linked, the customer can view Case Details and check out the Dashboard for more information.

If an account does not link immediately, the County will need to take further action to link the case to the customer's account. Once the case is linked, the customer receives a notification.

### High-Level Process Flow



*\*Multi-Factor Authentication*

### FAQs

**Q: How can the customer tell if the case is linked?**

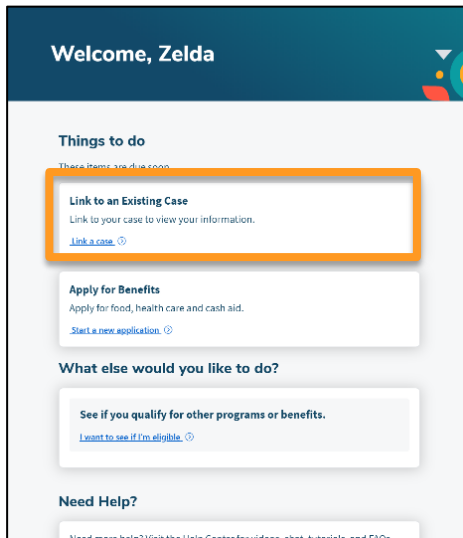
**A:** Case information will display on the dashboard.

**Q: If the customer moves to a new County, does the case have to be unlinked?**

**A:** Yes, the prior County will need to unlink the case to allow the new County to link. Please follow instructions in the CalSAWs Quick Guide "BenefitsCal Integration."

## Link to a Case:

1



### Customer Dashboard

From the Customer Dashboard, select the **Link a case** hyperlink.

2

A screenshot of the "Link Case Details" form. The title is "Enter the following information to link your existing case." The form has several fields: "Date of Birth" (MM/DD/YYYY), "Zip Code", "Select one other field" (with radio buttons for "Last 4 of SSN Number", "EBT Number", and "Case Number"), "County" (a dropdown menu), and "Case Number". The "Date of Birth", "Zip Code", "Case Number" radio button, and "Case Number" text input fields are highlighted with an orange border. At the bottom right is a red "Next" button.

### Link Case Details

Enter the **Date of Birth, Zip Code.**

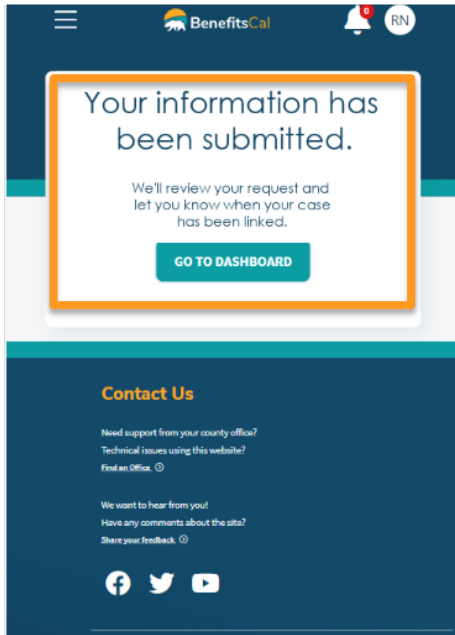
Click a **radio** button to select one additional field to complete and enter the information requested.

Click the **NEXT** button.



If the information entered matches an existing case (exactly) within CalSAWS, the account will be linked right away (near real time).

3



### Case Link Submitted – Requires Review

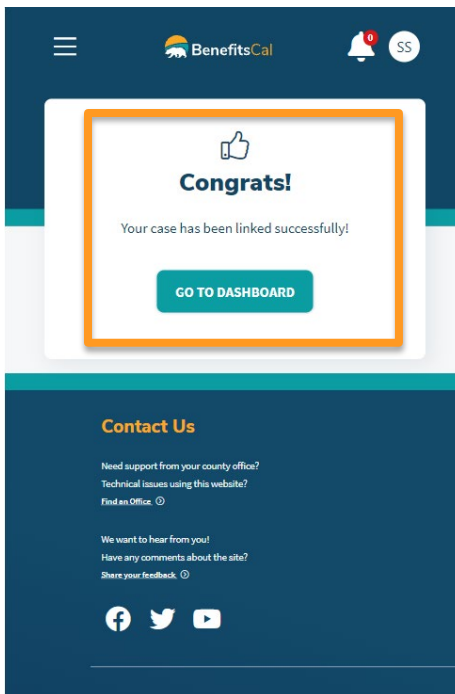
If the information entered does not match exactly, the confirmation message will display: Your Information has been submitted. We'll review your request and let you know when your case has been linked.

The County will need to link the case for the customer.



**CalSAWS:** To link the case in CalSAWS, go to the **Case Link Request** hyperlink on the Task navigation bar. Refer to CalSAWS Quick Guide "BenefitsCal Integration" for more information.

4

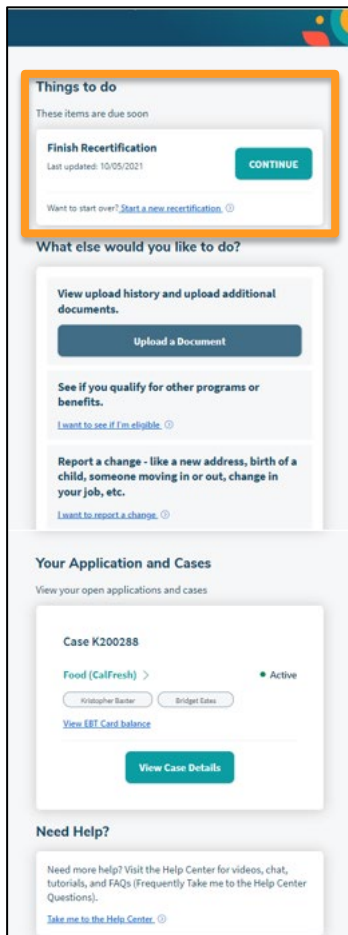


### Success Screen

If the information entered matches an existing case (exactly) within CalSAWS, the account will be linked right away (near real time).

The system will display a confirmation message: The case has been successfully linked. Click the **GO TO DASHBOARD** button to review case details.

5



## View Case Details

When the case is linked, the case information will display reminders on the Customer Dashboard of any upcoming Renewals, Redeterminations and Periodic Reports that are due.