e-Applications

Purpose

The purpose of this job aid is to provide instructions on processing an e-Application (e-App) within the System, as well as the other functions of e-Tools.

e-Application Terminology

The e-Application is an online application that applicants can access via the internet. This application is formatted after the SAWS 2.

Terminology	Definition
e-Application	An e-Application is the application that was completed and submitted by the Customer online.
Pending Clearance	The e-Application is pending CIN number selection, case number and worker assignment.
Data Transfer	The data or information provided by the applicant is pulled into the System and is ready for the user to review.
Transferred to System	The e-Application data is reviewed and the System data has been updated.
Not Accepted	The e-Application is canceled and was not transferred into the System.

Search for e-Applications

This section of the job aid provides you with information on how to access and use the e-Application Search page.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	On the **e-Application Search** page: a) Select **<e-App Status>** from the **e-App Status** drop list. b) Select **<Search By>** from the **Search By** drop list. c) Enter additional search information, if appropriate. Clicking the **Advanced Search** caret opens up additional criteria for searching. d) Click the **Search** button.

Identifying Expedited Service (ES) & Immediate Need (IN) e-Applications

The e-Application Search page displays an ES/IN column. This column identifies whether the applicant completed the ES and/or IN questions. The code(s) displayed are as follows:

- ES – Displays if the applicant potentially qualifies for ES
- IN – Displays if the applicant potentially qualifies for IN
- ES/IN – Displays if the applicant is potentially eligible to ES and IN
- No – Displays if the applicant does not meet ES or IN criteria or did not answer the ES or IN questions

Identifying e-Application Source

The e-Application Summary page contains an Origin field. This field identifies whether the e-Application was submitted by the Customer or Anonymous User directly or through a CBO. The values for the Origin field are as follows:

- Customer
- Anonymous User
- Community Based organization

Identifying Applications with an Authorized Representative

The e-Application Search page displays Authorized Representative information that the applicant enters in the Self-Service Portal. This information is populated in the Authorized Representative section on the e-Application Summary page. The information provided displays in the following fields:

- CalFresh Authorized Representative
- Phone Number of the CalFresh Authorized Representative

- Medi-Cal Authorized Representative
- Phone Number of the Medi-Cal Authorized Representative
- Address of the Medi-Cal Representative
- Organization Name
- I.D. Number
- Application Start Date
- e-Signature
- e-Signature Date

In addition, customers are able to designate an EBT Authorized Cardholder for CalFresh through the following fields in the Authorized Representative section on the e-Application Summary page:

- CalFresh EBT Authorized Cardholder
- Phone Number of the CalFresh EBT Authorized Cardholder
- Address of the CalFresh EBT Authorized Cardholder

Linking an e-App for a Customer who is Known to the System

The purpose of this section is to provide you with information on how to complete clearance for an e-Application when the primary applicant is known to the System.

This step-by-step starts after the application is submitted.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	On the **e-Application Search** page: a) Select **<e-App Status>** from the **e-App Status** drop list. b) Select **<Search By>** from the **Search By** drop list. c) Enter additional search information if appropriate. d) Click the **Search** button.
4.	In the **Search Results Summary** page section: a) Click the **e-App Number** hyperlink to select an e-Application.
5.	On the **e-Application Summary** page: a) Click the **Link e-App to Case** button to start the clearance process.
6.	On the **New Person Search** page: a) Click the **Search** button. **Note:** Fields are editable in the **New Person Search** page.

Step	Action
7.	On the **New Person Search Results** page: a) If the person record is for the e-Applicant/Recipient, click the **Select** button. **OR** If the person record is not for the e-Applicant/Recipient, click the **Cancel** button. b) Repeat step 6a until the e-Applicant/Recipient is identified and added.
8.	On the **New Person Detail** page: a) Click the **Continue** button. **OR** Click **Edit** to make updates/changes.
9.	On the **Previous Case List** page: a) Select the appropriate radio button for the case. b) Select the checkbox for each person applying for benefits. c) Click the **Select** button to select the existing System case.
10.	On the **Case Member List** page: a) Click the **Add Person** button to add individuals who are not listed on the case. **Note:** The **Add Person** button no longer displays once all individuals from the e-Application have been added. **OR** If all applicants are listed, click the **Save and Continue** button.
11.	On the **Program Application List** Page: a) Click either **Apply** or **Reapply** button.
12.	On the **New/Reapplication Detail** page: a) Select the **<Primary Applicant>** from the **Primary** drop list. b) Validate that the **<Application Date>** in the **Application Date** field is correct. c) Validate that the **<Beginning Date of Aid>** in the **Requested BDA** field is correct. i. Select **<Yes** or **No>** from the **Inter-County Transfer** drop list. If **<Yes>** is selected: Enter the appropriate **<Application Date>** in the **Prior County Application Date** field, if applicable. ii. Enter the appropriate **<Authorization Date>** in the **Prior County Initial Authorization Date** field, if applicable. iii. Enter the appropriate **<RE Due Month>** in the **Prior County RE Due Month** field, if applicable. d) Click the checkbox for each individual reapplying for the program. e) Click all other applicable program information. f) Click the **Save and Return** button.

Step	Action
13.	On the **Program Application List** page: a) Repeat steps 11 and 12 for each program being applied for. b) Click the **Continue** button.
14.	On the **Pending Assignment List** page: a) Select and assign a Worker. b) Update any other applicable case assignment options. c) Click the **Assign** button.
15.	On the **e-Application Summary** page: a) Click the **Close** button. **Note:** The e-Application is now ready for the user to review the data that the applicant entered.

Note: When you navigate to the Case Member List page and click the Save and Continue button, the following message may appear: The selected case has an associated e-Application that has not transferred to the System.

This means Data from a previous e-Application has not yet been transferred to the System; refer to the Data Transfer section in this Job Aid to complete the transfer.

Linking an e-App to a Case for a Customer not in System

This section of the job aid provides you with information on how to complete clearance for an e-App when the Primary Applicant is not known to the System.

This step-by-step starts after the application is submitted.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	On the **e-Application Search** page: a) Select **<e-App Status>** from the **e-App Status** drop list. b) Select **<Search By>** from the **Search By** drop list. c) Enter additional search information if appropriate. d) Click the **Search** button.
4.	In the **Search Results Summary** page section: a) Click the **e-App Number** hyperlink to select an e-Application.
5.	On the **e-Application Summary** page: a) Click the **Link e-App to Case** button to start the clearance process.
6.	On the **New Person Search** page: a) Confirm the information pre-populated in the fields. b) Click the **Search** button. **Note:** The person search fields are editable.
7.	On the **New Person Search Results** page: a) Click the **Add New Person** button when the person in the e-App is not known.

Step	Action
8.	On the **New Person Detail** page: a) Confirm sufficient info for a CIN and click the **Search** button under **Client Index Number** field.
9.	On the **Client Index Number (CIN) Search Results** page: a) Click the radio button next to the **Name** of the person and click the **Select** button. **OR** If unknown, click the **Request New CIN** button.
10.	On the **New Person Detail** page: a) Enter additional information if necessary (i.e., Address). **Note:** At least the Primary Applicant must be associated to an address to be listed as a Primary in any Program. b) Click the **Save and Continue** button.
11.	On the **Previous Case List** page: a) Click the **Create New Case** button.
12.	On the **Case Member List** page: a) Click the **Add Person** button to add additional case members. Repeat steps 6 through 10 until all people have been added and appear on the **Case Member List** page. **Note:** When all people have been added the Add Person button on the Case Member List page no longer displays. b) When all Case Members have been added, click the **Save and Continue** button.
13.	On the **New Programs Detail** page: a) Confirm the information pre-populated in the fields is correct. b) Click the **Edit** button if the **Program Information** needs to be updated for an individual. If no **Program Information** needs to be updated, continue to step 16.
14.	On the **Select Programs** page: a) Click the checkboxes for all programs for which the Individual is applying. b) Click the **Select** button.
15.	On the **New Programs Detail** page: a) Click the **Save and Continue** button.
16.	On the **Pending Assignment List** page: a) Select and assign a Worker according to your county procedures. b) Update any other applicable case assignment options. c) Click the **Assign** button.

Step	Action
17.	On the **e-Application Summary** page: a) Click the **Close** button. **Note:** The **Assigned Worker Information** page section is populated with the assignment information. The **e-App Status** field changes to Data Transfer and the **System Case Number** field is updated. The e-Application is now ready for the user to review the data that the applicant entered.

Unlinking an e-Application from a Case in the System

If you inadvertently link an e-Application to the incorrect case, you can repeat the steps to link the e-Application to the correct case. Once you repeat the steps, the e-Application shows as linked to the new/correct case and disappears from the case it was linked to.

Assigning or Reassigning an e-Application

The purpose of this section is to provide you with information on how to assign or reassign an e-Application to a worker.

This step-by-step starts from the Case Summary page for the linked e-Application.

Step	Action
1.	On the **Case Summary** page: a) Click on the caret for the **Self-Service Portal** section.
2.	In the **Self-Service Portal** section of the **Case Summary** page: a) Click the **e-App Number** hyperlink for the most current e-Application.
3.	On the **e-Application Summary** page: a) Click the **Edit** button. b) Click the **Select** button under the **Assigned Worker Name** field in the **Assigned Worker Information** section.
4.	On the **Select Worker** page: a) Enter the appropriate search information. b) Click the **Search** button.
5.	On the **Select Worker** page: a) Click the radio button for the appropriate Worker. b) Click the **Select** button.
6.	On the **e-Application Summary** page: a) Click the **Assign** button. b) Click the **Close** button.

Uploaded Documents from the Self-Service Portal

Applicants may upload documents from the Self-Service Portal account in the following 2 scenarios:

- Applicants are applying through the Self-Service Portal for the first time and have never linked their account to their System case.
- Applicants/recipients have an open case and a Self-Service Portal account.

When documents are uploaded from the Self-Service Portal, a webservice transfers the images to the CalSAWS/Highland Imaging System. Once the e-Application is linked to a case in the System, the images are transferred and available in the System.

Data Transfer

The purpose of this section is to provide you with information on the data transfer process. Review all information submitted by the applicant through the e-Application on all appropriate data collection pages. Information submitted by an applicant is indicated by the e-Data icon ( ) on the list and detail pages. You can accept or reject e-Data information for each field or drop list as necessary.

This step-by-step starts after the application is submitted and linked to a case. These steps assume you are in the context of a case.

Step	Action
1.	Place the cursor over **Eligibility** on the **Global** navigation bar.
2.	Select **Customer Information** from the **Local** navigator.
3.	Click the **Individual Demographics** link on the **Task** navigation bar.
4.	On the **Individual Demographics List** page: a) Click the **Name** hyperlink or the **Add** or **Edit** button to verify each applicants Individual Demographics information. **Note:** The e-Data icon ( ) displays indicating the System has electronically received information through the Self-Service Portal.
5.	On the **Individual Demographics Detail** page under the **e-Data Comparison** section: a) Determine what information to accept or update. b) Unclick the checkbox for any e-Data not being updated. c) Click the **Import Selected Data** button. **Note**: The information is updated in the corresponding fields. d) Click the **Page Reviewed/Update Status** checkbox. **Note:** This verifies the e-Application review is complete. The e-Data icons no longer display. e) Click the **Save and Return** button. **Note:** Fields may also be updated individually throughout the Individual Demographics Detail page. Follow Step 6 to manually update each field with an e-Data icon.
6.	On the **Individual Demographics Detail** page in the e-Data: a) Determine what information to accept or update.

Step	Action
	b) For data being accepted or updated, click the **e-Data** icon, and then click the e-data pop-up for each field or drop list. **Note:** The information is transferred to the corresponding field or drop list. c) Click the **Page Reviewed/Update Status** checkbox. **Note:** This verifies the e-Application review is complete. The e-Data icons no longer display. d) Click the **Save and Return** button.
7.	Repeat steps 4 through 6 until all data collection pages have been reviewed and updated.
8.	Navigate to the **e-Application Summary** page: a) Click the **Edit** button. b) Change the status of the e-Application by selecting **Transferred to System** from the **e-App Status** drop list**.** c) Click the **Save** button. d) Click the **Close** button.

SAR 7s Submitted through the Self-Service Portal

Customers can complete and sign SAR 7s from their Self-Service Portal account. A webservice transfers the data submitted by the customer to CalSAWS. CalSAWS uses the data submitted to populate the SAR 7 and send it to the imaging system. The imaging system updates the Customer Reporting List page to show the SAR 7 has a status of Received. Refer to the Semi-Annual Report (SAR 7) – Process Job Aid for more information on processing a SAR 7.

REs Submitted through the Self-Service Portal

Customers can complete and sign their RE from their Self-Service Portal account. A webservice calls the data submitted by the customer to CalSAWS. CalSAWS uses the data to populate the RE form and sends it to the imaging system. The imaging system updates the Customer Reporting List page to show the RE has a status of received.

Case Link Requests to the Self-Service Portal

Customers may link their Self-Service Portal Account to their case via the Self-Service Portal. If the linking does not occur automatically then the county user must manually complete the process. Case Link requests must be completed by the county user on the **Case Link Request Search** page.

Self Service Portal accounts are at the Person Level and will automatically link to <u>all</u> cases in which the person is associated.

This step-by-step begins when the link request is received from the Self-Service Portal.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Click **Case Link Request** link on the **Task** navigation bar.
4.	On the **Case Link Request Search** page: a) Enter the **Registrant First Name** and/or **Registrant Last Name** b) Click on **Search** c) In the **Search Results Summary** click the **Submit** button for the **Registrant Name** being processed.
5.	On the **Select Person** page: **Note:** The information the Registrant entered from the Self-Service Portal pre-populates a) Click the **Search** button.
6.	On the **Select Person** page: **Note:** Registrant may have multiple entries in the Search Results Summary, Worker should determine the correct person to select from the results. a) Click the radio button for the appropriate person. b) Click the **Select** button.
7.	On the **Case Link Select Person Summary** page **Note:** The information provided by the Registrant is displayed along with the Person Information in CalSAWS: a) If the person information appears to match what was provided by the Registrant click the **Continue** button and go to Step 7c. b) If the Person information appears not to match click the Cancel button and return to Step 6. c) The Linked Person **Registration Status** updates to Processed, click the **Close** button. **Note:** If the customer is already linked to another Self-Service Portal account or is not the Primary Applicant on the Case a Validation message appears. Follow the steps for **Rejecting a Case Link Request** when this occurs.

Rejecting a Case Link Request

Under certain circumstances a case link request from a Self-Service Portal account must be rejected.

This step-by-step starts after the link request is submitted.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Click the **Case Link Request** link on the **Task** navigation bar.

Step	Action
4.	On the **Case Link Request Search** page: a) Enter the **Registrant First Name** and/or **Registrant Last Name** b) Click on **Search** c) Click the **hyperlink** for the **Registrant Name** being processed.
5.	On the **Case Link Select Person Summary** page: a) Review the data and click the **Reject** button. b) Click the **Close** button.

Unlinking a Case from a Self-Service Portal Account

Under certain circumstances a person must be unlinked from a Self-Service Portal account.

This step-by-step starts after a person has been linked to a Self-Service Portal account.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Click the **Case Link Request** link on the **Task** navigation bar.
4.	On the **Case Link Request Search** page: a) Click the **Unlink** button.
5.	On the **Select Person** page: a) Enter the appropriate search information. b) Click the **Search** button.
6.	On the **Select Person** page: a) Click the radio button for the appropriate person. b) Click the **Select** button.
7.	On the **Case Link Select Person Summary** page: a) Click the **Unlink** button. b) Click the **Close** button.

Sending e-Messages

e-Messages allows an e-message to be sent to the customer's Self-Service Portal account. If the customer provides a personal email address, an e-mail is sent informing them they have an e-message on their Self-Service Portal account. If the customer does not provide a personal email address, the e-message is only sent to their Self-Service Portal account.

Follow your county policy regarding e-Messages.

This step-by-step starts after a customer is linked to a Self-Service Portal account and has an active or pending case.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Click the **E-Messages** link on the **Task** navigation bar.
4.	On the **Select Person** page: a) Enter the appropriate search information. b) Click the **Search** button.
5.	On the **Select Person** page: a) Click the radio button for the appropriate person. b) Click the **Select** button.
6.	On the **e-Messages Search** page: a) Click the **Add** button.
7.	On the **e-Messages** pop-up: a) Enter the appropriate information on the **e-Message Subject** field. b) Enter the message to the customer on the **e-Message Body** field. c) Click the **Submit** button.
8.	On the **e-Messages Search** page a) The e-message **Status** can be reviewed. **OR** Click the **View** button to view the e-message sent to the customer.

Adding a Customer Privacy Request

Customers may not want their case information to be sent to their Self-Service Portal account for various privacy reasons. Customers requesting that no information be sent to their Self-Service Portal Account may have a Customer Privacy Record associated to their case. The Customer Privacy Record is used by a webservice when attempting to return case information to the Self-Service Portal to prevent the information being sent to the Self-Service Portal.

This step-by-step starts after a privacy request is submitted by the customer.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Click the **Self-Service Portal Customer Privacy** link on the **Task** navigation bar.
4.	On the **Select Person** page: a) Enter the appropriate search information. b) Click the **Search** button.

Step	Action
5.	On the **Select Person** page: a) Click the radio button for the person being updated. b) Click the **Select** button.
6.	On the **Self-Service Portal Customer Privacy Search** page: a) Confirm the customer's information is correct. b) Click the **Add** button.
7.	On the **Self-Service Portal Customer Privacy Detail** page: a) Select the case number from the **Case Number** field. b) Enter the **<Begin Date>** on the **Begin Date** field. c) Click the **Save and Return** button.

End Dating a Customer Privacy Request

Customers requesting case information, forms and NOAs be available through their Self-Service Portal Account after a Customer Privacy Request was processed can have their privacy request end dated.

This step-by-step starts after the privacy request has been processed for the customer.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Click the **Self-Service Portal Customer Privacy** link on the **Task** navigation bar.
4.	On the **Select Person** page: a) Enter the appropriate search information. b) Click the **Search** button.
5.	On the **Select Person** page: a) Click the radio button for person being updated. b) Click the **Select** button.
6.	On the **Self-Service Portal Customer Privacy Search** page: a) Confirm the customer's information is correct. b) Click the **Edit** button on the **Opted-Out Privacy History** section for the request being updated.
7.	On the **Self-Service Portal Customer Privacy Detail** page: a) Select the case number from the **Case Number** field. b) Enter the **<End Date>** in the **End Date** field. c) Click the **Save and Return** button.