Self-Service Portal (SSP) e-Message

[Purpose](#purpose)
[Self-Service Portal (SSP) e-Message Pages](#)
[Send An e-Message](#)
[Two Way Messaging](#)
[Home Page](#)
[Case Summary Page](#)
[Action Request](#)
[Respond To An e-Message](#)
[Request An Action From The Customer](#)
[Closing an e-Message Action](#)

Purpose

The purpose of this job aid is to provide instructions for sending e-Messages to, requesting an Action from, or responding to a message from the SSP User.

Self-Service Portal (SSP) e-Message Pages

The Self-Service Portal (SSP) e-Message pages allows for messaging capability between the SSP User and the worker.

Any worker with the appropriate security rights can send an e-Message to the SSP User. If the customer has opted into e-Notification, an e-mail is sent informing them they have an e-message on their SSP account. If the customer does not opt into e-Notification, the e-message is only sent to their SSP account. To send an e-Message, the Customer must have created an SSP account.

Counties that opted into Two Way messaging have additional capability in the e-Messages pages. Workers also can receive an e-Message from the SSP User and respond if needed. Workers can also request an Action from the customer.

Send An e-Message

e-Messages functionality allows an Opted-In or Opted-Out County to send an e-message to the customer's SSP. If the customer provides an email address and has opted in for e-Notifications, an e-mail is sent informing them they have an e-message exists on their SSP account. If the customer is not opted-in to e-Notifications, the e-message is only sent to their SSP account.

To send an e-Message, the Customer must have created an SSP account. Follow your county policy regarding e-Messages.

This step-by-step starts after a customer is linked to a SSP 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 **e-Messages Search** page: a) Enter the appropriate search information. b) Click the **Search** button. c) Click the **Add e-Message** button.
5.	On the **e-Messages Detail** page: a) Select a <**Case Number**> by clicking on the **Select** button or manually enter the **Case Number**. b) Select a **<Person>** from the **Person Name** drop list. **Note:** A drop list only appears when a Case Number has been entered. c) Select **Message** from the **e-Message Type** drop list. d) Enter the <**Subject**> information in the **e-Message Subject** field. e) Enter the <**Message**> you wish to send to the SSP User in the **e-Message Body** text field. **Note**: There is a 4000-character limit for the e-Message Body text box. f) Click the **Save** button.
6.	On the **e-Messages Detail** page: a) Click the **Close** button.
7.	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.

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Two Way Messaging

Two Way Messaging allows the SSP User to send messages and responses to their worker. Workers can send Action requests to Customers and respond to SSP User messages.

Additional features on the Home page and on the Case Summary page display that a case has an available e-Message(s) for Opted In counties.

Home page:

The My e-Messages section displays on the Home page for workers that have the appropriate security rights and have a program that received an e-Message. When the worker logs into the System and accesses the Home Page, the My e-Messages section displays and is expanded if there are any e-Messages for the logged in Worker that are either Received, Read, or Action Completed, or where a Response is overdue. These e-Messages require a review by the worker. Clicking the number hyperlink will navigate the worker to the e-Messages Search page with the appropriate parameters automatically applied.

Case Summary page:

If an e-Message is available for a case the Case Summary page displays a yellow banner notifying the worker a new e-Message is available.

Action Request:

Opted In Counties can also send an Action Request to the SSP User and receive an update when the SSP User has taken the action. Action requests include the ability to send a request for the SSP User to upload a document or the worker can send the SSP User Forms/NOAS with the action request of View Document.

As the message moves through the flow, the message Status will change. Below is a list of Statuses and when the status changes.

Status	Definition	Person
Sent	An e-Message is created and sent through the SSP.	CalSAWS Worker
New Action	An action request is created and sent through the SSP.	CalSAWS Worker
Received	CalSAWS received an e-Message from the SSP.	SSP User
Read	The e-Message has been accessed.	SSP User
Replied	A response is initiated in CalSAWS and sent through the SSP.	CalSAWS Worker

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Status	Definition	Person
Action Completed	The action has been completed and sent to CalSAWS	SSP User
Action Closed	The action has been reviewed and the action record is closed.	CalSAWS Worker

Respond To An e-Message

When a SSP User sends a message, the Worker, based on county policy, can respond to the SSP User through the e-Messages pages.

This step-by-step starts after a customer has sent an e-Message to the Worker.

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 **e-Messages Search** page: a) Enter the appropriate search information. b) Click the **Search** button.
5.	On the **e-Messages Search** page **Search Results Summary** section: a) Click the **Subject** hyperlink for the e-Message.
6.	On the **e-Messages Detail** page: a) Review the Message received. b) Click on the **Edit** button. c) Enter <**Response Information**> in the **e-Message Body** text box. d) Click the **Save** button. **Note**: the e-Message status is updated to **Replied**. e) Click the **Close** button.
7.	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.

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Request An Action From The Customer

The worker can request information or verifications from the customer or send forms to the customer to complete and return.

This step-by-step starts when the Worker determines that an action is needed from 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 **E-Messages** link on the **Task** navigation bar.
4.	On the **e-Messages Search** page: d) Enter the appropriate search information. e) Click the **Search** button. a) Click the **Add e-Message** button.
5.	On the **e-Messages Detail** page: a) Select a <**Case Number**> by clicking on the **Select** button or manually enter the **Case Number**. b) Select a **<Person>** from the **Person Name** drop list. **Note:** A drop list only appears when a Case Number has been entered. c) Select **Action** from the **e-Message Type** drop list. d) Select <**Action Type**> from the **Action Type** drop list. If **View Document** is selected: e) Select the <**Form**> from the **View Documents** drop list. **Note**: Only documents that have been identified as being able to be sent through the SSP are available for selection. f) Enter the <**Subject**> information in the **e-Message Subject** field. g) Enter the <**Message**> you wish to send to the customer in the **e-Message Body** text field. **Note**: There is a 4000-character limit for the **e-Message Body** text box. h) Click the **Save** button. **Note**: The e-Message status is set to New Action. Click the **Close** button.

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Step	Action
6.	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.

Closing An e-Message Action

When a response is received from the customer the e-Message status is updated to Action Completed.

This step-by-step starts when the Worker determines that an action is completed.

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 **e-Messages Search** page: f) Enter the appropriate search information. g) Click the **Search** button.
5.	On the **e-Messages Search** page **Search Results Summary** section: Click the **Subject** hyperlink for the e-Message.
6.	On the **e-Messages Detail** page: b) Review the Message received. c) Click on the **Edit** button. **Note**: If the customers response is incomplete continue with the steps **and** initiate a new action request if appropriate. d) Select **Action Closed** from the **Status** drop list. e) Click the **Save** button. f) Click the **Close** button.