

Self-Service Portal (SSP) - e-Applications

[Purpose](#)

[e-Application Terminology](#)

[Search for e-Applications](#)

[Identifying Expedited Service \(ES\) & Immediate Need \(IN\) e-Applications](#)

[Identifying the e-Application Source](#)

[Identifying e-Applications With an Authorized Representative](#)

[Linking an e-App for a Customer Who is Known to the System](#)

[Linking an e-App to a Case for a Customer Not Known to the System](#)

[Unlinking an e-Application From a Case in the System](#)

[Assigning or Re-assigning an e-Application to a Worker](#)

[Uploaded Documents from the Self-Service Portal](#)

[Data Transfer](#)

[SAR 7s Submitted through the Self-Service Portal](#)

[Redetermination/Recertification/Renewal \(RE\) Submitted through the Self-Service Portal](#)

[Report a Change \(RAC\)](#)

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 related to Self-Service Portal (SSP).

e-Application Terminology

The e-Application is an online application that applicants can access via the SSP. The application format is based on the SAWS 2 PLUS.

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

Search for e-Applications

This section provides 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 expands the section to display additional search criteria. d) Click the Search button.

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

The e-Application Search page displays an ES/IN column **in the Search Results Summary section**. 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 eligible for ES
- IN – Displays if the applicant potentially eligible 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 the e-Application Source

The Origin field on the e-Application Summary page identifies whether the e-Application was submitted by the customer, an anonymous user or through a **community-based** organization (CBO). The values for the Origin field are as follows:

- Customer
- Anonymous User
- Community Based Organization

The agency name for the CBO displays, **in the User Agency field**, when the origin is a CBO.

Identifying e-Applications With an Authorized Representative

The e-Application Search page displays authorized representative information that the applicant enters in the SSP. This information is populated in the Authorized Representative section of the e-Application Summary page. The information provided displays in the following fields:

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

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 e-Application is submitted and the e-App Status is Pending Clearance.

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 on the New Person Search page are editable and pre-populated with the information from the e-application.

Step	Action
7.	<p>On the New Person Search Results page:</p> <p>a) Click the radio button next to the Name for the primary applicant.</p> <p>b) Click the Select button.</p> <p>OR</p> <p>If the person record is not for the primary applicant, then click the Cancel button.</p> <p>c) Repeat step 6a until the primary applicant is identified and selected.</p>
8.	<p>On the New Person Detail page:</p> <p>a) Click the Continue button.</p> <p>OR</p> <p>Click the Edit button to make updates/changes and then click the Save and Continue button.</p>
9.	<p>On the Previous Case List page:</p> <p>a) Select the radio button for the appropriate case or create a New Case if applicable.</p> <p>b) Select the checkbox for each person applying for benefits.</p> <p>c) Click the Select button to select the existing case.</p>
10.	<p>On the Case Member List page:</p> <p>a) Click the Add Person button to add individuals who are not listed on the case.</p> <p>OR</p> <p>If all applicants are listed, click the Save and Continue button.</p>
11.	<p>On the Program Application List Page:</p> <p>a) Click the Apply or Reapply button for the appropriate program(s).</p>

Step	Action
12.	<p>On the New/Reapplication Detail page:</p> <ul style="list-style-type: none"> a) Validate the <Primary Applicant> displaying in the Primary field is correct. b) Validate that the <Application Date> in the Application Date field is correct or update if applicable. c) Validate that the <Beginning Date of Aid> in the Requested BDA field is correct or update if applicable. d) Enter the <Beginning Date of Aid> in the Cash-based Medi-Cal BDA field if applicable. e) Select <Yes or No> from the Inter-County Transfer drop list. Note: If Yes is selected, the following three fields display. f) Enter the appropriate <Application Date> in the Prior County Application Date field, if applicable. g) Enter the appropriate <Authorization Date> in the Prior County Initial Authorization Date field, if applicable. h) Enter the appropriate <RE Due Month> in the Prior County RE Due Month field, if applicable. i) Click the checkbox for each individual you want to add to the program. j) Click the checkbox next to the Name of each person being added to the application. k) Click the Save and Return button.
13.	<p>On the Program Application List page:</p> <ul style="list-style-type: none"> a) Repeat steps 11 and 12 for each program for which the customer is applying. b) Click the Continue button.
14.	<p>On the Pending Assignment List page:</p> <ul style="list-style-type: none"> a) Select and assign a worker according to your county policy and procedures. b) Update any other applicable case assignment options. c) Click the Assign button.
15.	<p>On the e-Application Summary page:</p> <ul style="list-style-type: none"> a) Click the Close button. <p>Note: The e-Application is now ready for the worker to review the data that the applicant entered.</p>

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 Known to the System

This section provides 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: Fields on the New Person Search page are editable.
7.	On the New Person Search Results page: a) Click the Add New Person button since the person from the e-App is not known.
8.	On the New Person Detail page: a) Confirm sufficient info for a CIN and click the Search button under the 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: The Primary Applicant must be associated to a mailing 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.

Step	Action
12.	On the Case Member List page: <ol style="list-style-type: none"> 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) Click the Save and Continue button when all Case Members have been added.
13.	On the New Programs Detail page: <ol style="list-style-type: none"> 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 15.
14.	On the Select Programs page: <ol style="list-style-type: none"> 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: <ol style="list-style-type: none"> a) Click the Save and Continue button.
16.	On the Pending Assignment List page: <ol style="list-style-type: none"> a) Select and assign a worker according to your county procedures. b) Update any other applicable case assignment options. c) Click the Assign button.
17.	On the e-Application Summary page: <ol style="list-style-type: none"> 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 worker 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 in the "Linking an e-App for a Customer Who is Known to the System" section of this Job Aid 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 to which it was originally linked. If the e-Data has already been accepted in the previous case the e-Data **will not** transfer to the new case.

Assigning or Re-assigning an e-Application to a Worker

The purpose of this section is to provide 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 case linked to the e-Application.

Step	Action
1.	On the Case Summary page: a) Click the Expand caret in the Self-Service Portal page section. b) Click the e-App Number hyperlink for the most current e-Application.
2.	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 page section.
3.	On the Select Worker page: a) Enter the appropriate search information. b) Click the Search button.
4.	On the Select Worker page: a) Click the radio button for the appropriate worker. b) Click the Select button.
5.	On the e-Application Summary page: a) Click the Assign button. b) Click the Close button.


Uploaded Documents From the Self-Service Portal

Customers may upload documents from their SSP account in the following two (2) scenarios:


- Applicants are applying through the SSP for the first time and have never linked their account to their System case
- Applicants/recipients have an open case and a **linked** SSP account

When documents are uploaded from the SSP, the images transfer to the CalSAWS/Imaging system. Once the e-Application is linked to a case in the System, the images are transferred and available in the System **for viewing**.

Data Transfer

The purpose of this section is to provide information on the data transfer process. Data the customer enters in the SSP populates on the data collection pages. Review all information submitted by the applicant on all appropriate data collection pages. Information submitted by an applicant is indicated by the e-Data icon () on the list and detail pages. The e-Data information for each field or drop list **can be accepted or rejected** as necessary.

This step-by-step starts after the application is submitted and linked to a case and the e-App Status is "Data Transfer". 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 Edit button to verify each applicants Individual Demographics information. Note: The e-Data icon () displays indicating the System has electronically received information from the SSP.
5.	On the Individual Demographics Detail page under the e-Data Comparison page section: a) Determine what information to accept or update. Go to step 6 if you want to manually update the e-Data for each field individually. b) Unselect the checkboxes 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 and go to step 7.
6.	On the Individual Demographics Detail page in the e-Data page section: a) Determine what information to accept or update. 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.

NOTE: It is important that the e-Application status is updated after reviewing and updating the information in the detail pages.

Step	Action
8.	Navigate to the e-Application Summary page: a) Click the Edit button.

Step	Action
	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 **the** SAR 7 from their SSP account. The data, submitted by the customer, transfers to **the System**. **The System** uses the data submitted to populate the SAR 7 **form** and **upload** it to the Imaging system. The Imaging system updates the Customer Reporting Detail 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.

Customers may also upload a SAR 7 through their SSP account. These forms are uploaded directly to the Imaging system for processing.

Redetermination/Recertification/Renewal (RE) Submitted through the Self-Service Portal

Customers can complete and sign the RE from their SSP account. The data submitted by the customer transfers to **the System**, **the System** uses the data to populate the RE form, and uploads the form to the Imaging system. The Imaging system updates the Customer Reporting Detail page to show that the RE is Received. **The data entered for the RE, through the SSP, does not automatically update the data collection pages in the System**. **The information is manually entered/updated by the user**. Refer to the CalWORKs CalFresh Re-Evaluation and Periodic Reporting job aid or Medi-Cal Renewal Packets job aid for more information on processing an RE.

Report a Change (RAC)

Customers, with an active program, have the option to report changes through their SSP account. Changes include such things as new mailing/physical address, updated income /property, adding or removing a person from the program/case, etc... The new information is added using pages on the SSP. When the Customer submits the change, a task is generated, and a journal entry is added to the case defining the information reported by the recipient. This new information is not automatically uploaded to the data collection pages in the System. Users must manually enter the changed information. Users should follow their county process flow for working the task and running EDBC for the change reported.

Note: The SSP also generates a RAC Change Summary, with all the information entered by the Customer, and uploads the form to the Imaging solution. Users can access the form by clicking the Images button in the System.