BenefitsCal

Fact Sheet: Case Linking and Case Linking Verification

This fact sheet provides information about case linking and verification.

What is Case Linking?

- Case linking is when a BenefitsCal customer account is linked to a person record within CalSAWS.

- A customer may exist on multiple cases within CalSAWS, and therefore multiple cases may display on the customer's dashboard within BenefitsCal. Cases display when:

    o The individual is a primary applicant on a program and,

    o The individual is not marked permanently out of home and,

    o The case is allowed to show data on the portal; there is no active customer privacy record in CalSAWS.

What is Multi-factor Authentication (MFA) Case Linking Verification?

MFA is a secure way for customers to prove their identity and link their cases.

*Note: please be aware that Verification for Case Linking is **not** the same as BenefitsCal Login MFA. Login MFA is ONLY when a customer is logging in to BenefitsCal.*

MFA Case Linking Verification Steps

After logging in, the customer lands on their **Welcome** screen. The following are the steps a customer must follow to successfully complete MFA Case Linking Verification.

Note: All examples throughout this FACT sheet contain mock data.

Step 1) Customers are prompted by a **Welcome** screen when they log in and need to click on the **Link to an Existing Case** hyperlink.
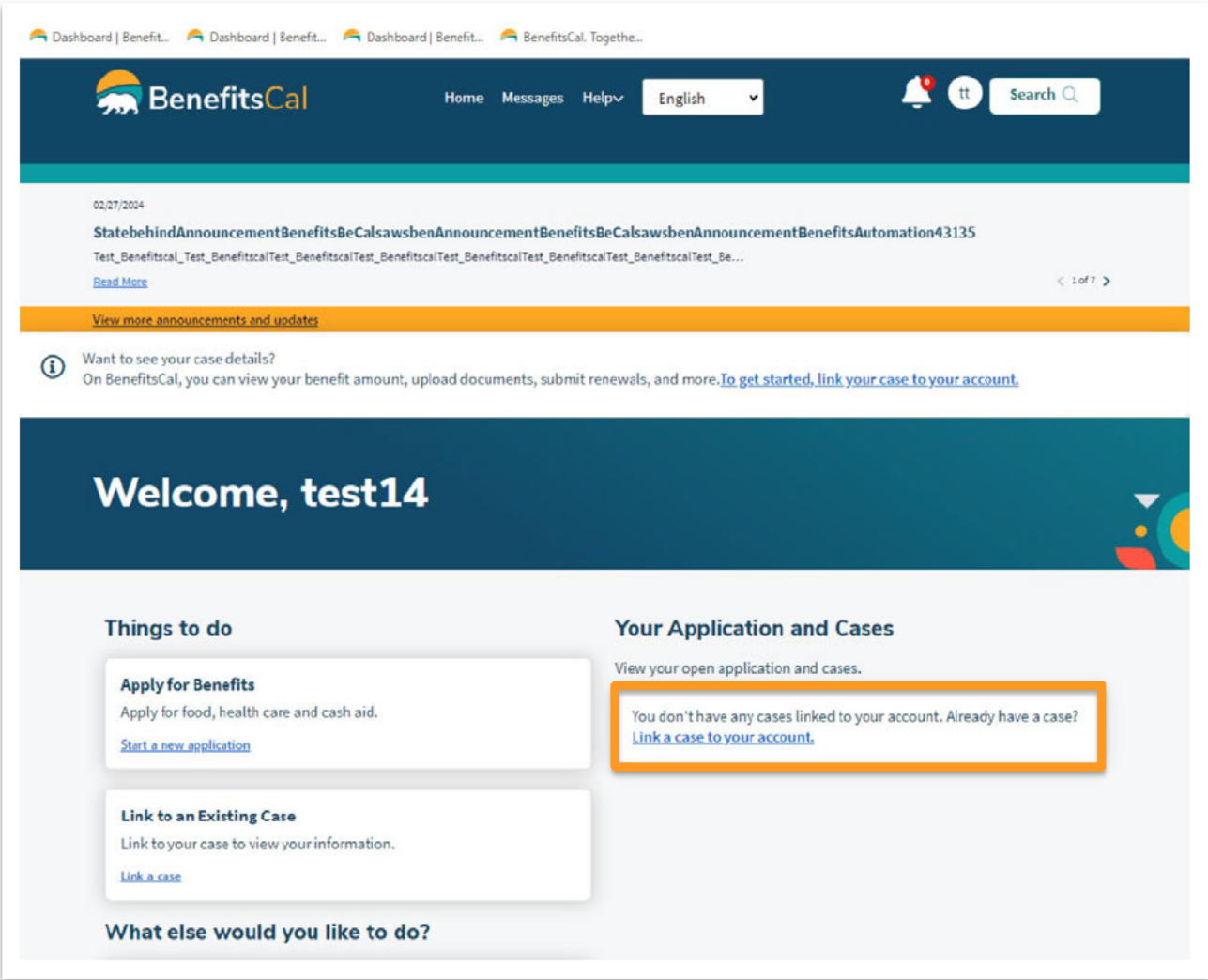
Step 2) Customers enter the following information to link a case to a BenefitsCal account and then click the **Next** button:

- Date of Birth (DOB)
- Zip Code
- County
- Case Number

Note: The web page informs them that they must be the primary applicant to link their case.

Step 3) Next customers are asked to verify their identity to link cases.

The email address from their case details appears. If the correct email address is shown, they select the radio button and then click the **Send** button.

Notes: If the email is incorrect or inaccessible, they are notified to contact their county office to update the email address in the case detail.

The verification email may take up to 15 minutes to arrive. Once received, to avoid expiration, the customer needs to click the link within 24 hours.

Step 4) After clicking the **Send** button, the customer receives a special verification link by email from Verify.NoReply@App.CalSAWS.org.

Step 5) After clicking on the verification link in the email, the customer has been successfully verified, and this web page appears. To view their linked cases on their dashboard, customers need to log back in to BenefitsCal by clicking a **Log In** button.

Step 6) Once the case is linked successfully, case details can be seen on the dashboard.
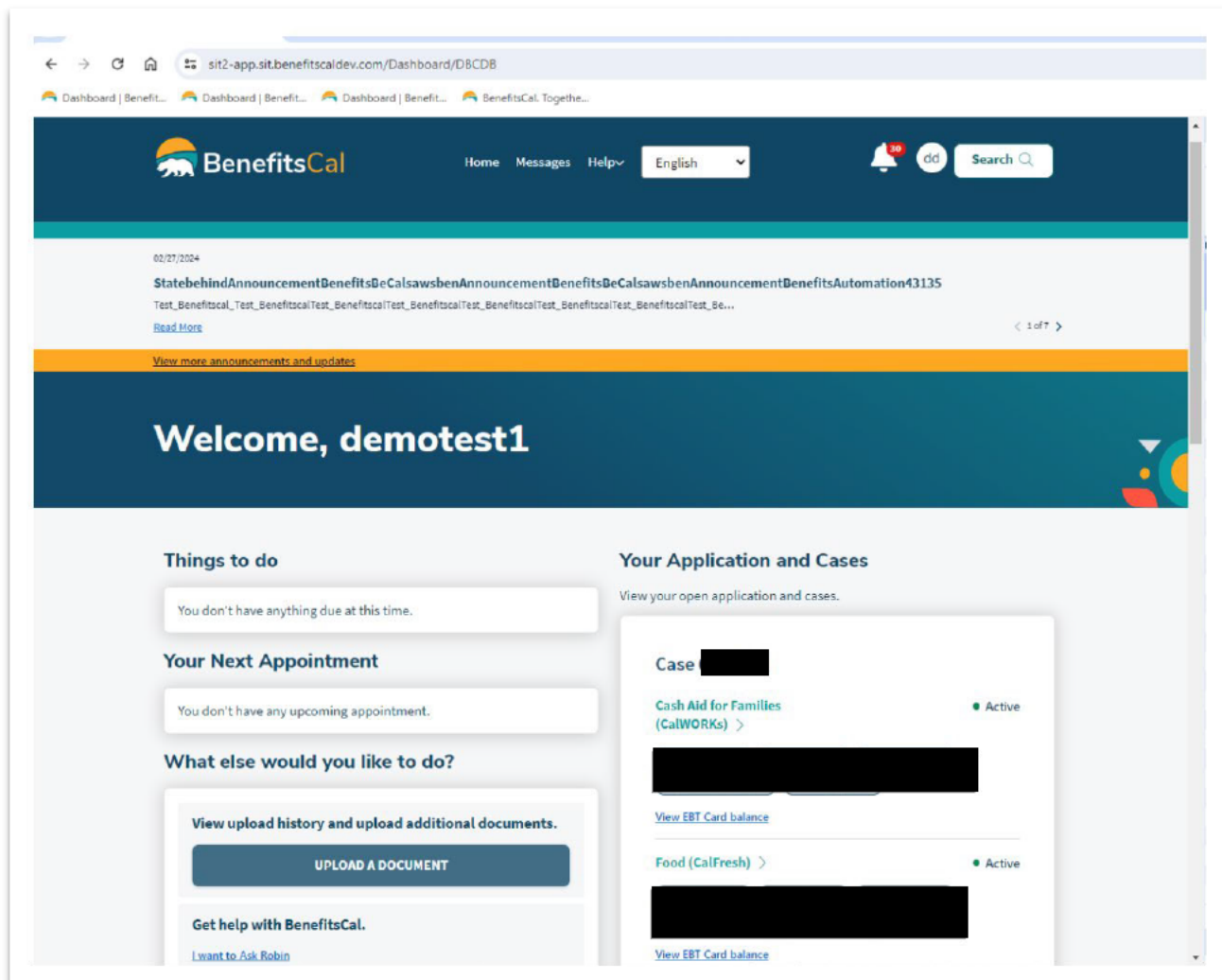
Case Linking Trouble Shooting – County Action

There may be instances when customers reach out to counties because they did not receive the email verification link. If that occurs, check the contact information on their case and verify that they have the right email. If not, provide them with the correct email address and ask them to try again to link their cases.

Here are some helpful troubleshooting tips to share:

- It could take up to 15 minutes to receive the link.

- Check spam/junk folders.

- When the email verification link is received, it expires after 24 hours.

Assistance with customer e-mail address update for customer identity verification:

An email address must be listed on the case for a customer to self-verify identity as part of the case link action. If a customer does not have an email address on CalSAWS, BenefitsCal will prompt the customer to contact the county case worker. The email address does not have to be the same email address used for the BenefitsCal account. To update email on the case, navigate to the **Contact Detail** screen and update their email address.

Once the email is added to the customer's contact details in CalSAWS, the customer can be asked to retry the case-link action using BenefitsCal.

For additional support on assisting customers with self-identification, please reference the CalSAWS case link job aid **JA Self-Service Portal (SSP) – Case Link Requests**.

Assistance with Processing a Case-Link Request After Customer Identity Verification

The customers are presented with a message that the case link request has been submitted for a county review on the BenefitsCal self-service portal when the customer's information cannot be uniquely determined at CalSAWS to process an automatic case link, even after a customer's identity is successfully verified. **A manual review of the submitted case linking data is required to** process the case linking request. Follow process to review the request and take action.

- On the **Case Link Request Search** screen, search for the registrant's name using both name fields.

- Click the **Submit** button next to the registrant's name in the **Search Results Summary** screen section.

- On the **Case Link Select Person Summary** screen, a green dot appears next to data on the screen that was entered by the customer on the SSP, and the data without the green dot is the data that is currently in CalSAWS. This provides a reference point to confirm that what was entered in the SSP matches with information in CalSAWS.

The counties may consider rejecting a Case Link Request for various reasons. Possible scenarios include:

- Any of the associated cases have an active Children Services program.

- The Primary Applicant has an active Customer Privacy record or,

- The individual requesting the Case Link is not actually the Primary Applicant on any program or the Applicant is already linked to another account.

The following screenshots provide an example of the person summary screen validation message displayed when the applicant is not a primary applicant or already has another linked account.

Scenario1: This is an example of a screen a county worker may see if the customer is not the Primary Applicant on the case. If the person selected is not a primary applicant, then after clicking the **Continue** button, the case worker will see the screen below and the validation message, "Unable to link person to this account, ▇▇▇▇▇ is not the primary applicant listed on this case."

- **Note**: This is just an example of a Person Summary.

Case Link Select Person Summary

Unable to link person to this account, ▇▇▇▇▇ is not the Primary Applicant listed on this case.

Case Number: ▇▇▇		**Linked Status:** Pending
First Name: ▇▇▇	**Middle Name:**	**Last Name:** ▇▇
SSN: ▇▇▇	**Date of Birth:** ▇▇▇	**Gender:** Female Female●
Address Line 1: ▇▇▇	**City:** ▇▇	**State:** CA CA●
Zip Code: ▇▇		
Phone Number: ▇▇▇		

Cancel

Scenario2: This is an example of a screen a county worker may see if the customer is already linked to another BenefitsCal account. If the person selected is already linked to another account, then after clicking the **Continue** button, the case worker will see the screen below and the validation message, "Unable to link person to this account, ▇▇▇▇▇ is already linked to another account."

- **Note**: This is just an example of a Person Summary.

For additional support on assisting customers with Processing a Case Link Request or Rejecting a Case Link Request or Unlinking a primary Applicant from the self-service portal account, please reference the CalSAWS case link job aid **JA Self-Service Portal (SSP) – Case Link Requests.**