

Self-Service Portal (SSP) - Case Link Requests

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Purpose

The purpose of this job aid is to provide instructions for processing requests to link the customer's case to their Self-Service Portal (SSP) account.

Self-Service Portal (SSP) Case Link Requests

Customers may link their SSP account to their case via the SSP. Case link requests occur automatically if there is a 100% information match and the customer has verified their identity through e-mail verification. If there is not a 100% information match, the user must manually complete the process. Case Link Requests are completed by the user through the Case Link Request Search page after the customer's identity has been verified.

When a customer auto links their Self-Service Portal account after a case link request was triggered, the user is unable to process those case link requests. A message displays letting the user know this person is already linked to a Self-Service Portal account. A nightly batch marks any remaining case link requests in a Pending status, that have already been linked to a person record, to a Processed status.

Assisting Customers with Self Identification

Customers must verify their identity through e-mail or text verification to link their account to their cases. A customer must have an email address listed in the E-mail Address field or a phone number listed on the Contact Detail page to use e-mail or text verification. The email address does not have to be the same email address used for their BenefitsCal Account. Only the Cell, Main, Message, Home or Work phone types are used to self-identify through text verification.

This step-by-step starts within the context of a case.

| Step | Action |
|------|--|
| 1. | Place the cursor over Case Info on the Global navigation bar. |
| 2. | Select Contact from the Local navigator. |
| 3. | On the Contact Summary page Contact Information section: Click the Edit button for the Primary Applicant. |
| 4. | On the Contact Detail page: |

| Step | Action |
|------|---|
| | <p>a) Enter the <customer's e-mail address> in the E-mail Address field. And/Or</p> <p>b) Enter the <customer's phone number> in the Number field in the Phone Numbers section.</p> <p>c) Select the <Phone number type> in the Type drop list in the Phone Numbers section. Note: Acceptable phone types needed to self-identify through text verification are Cell, Main, Message, Home or Work.</p> <p>d) Click the Save button. Note: The customers email address does not have to be in a verified status for a customer to use email verification.</p> |

Once the e-mail address or phone number has been added to the customer's **Contact Detail** page the customer will need to retry the case linking in the SSP. If the Customer does not want to provide their email or the email used for the BCAL account, then they will not be able to link.

Processing a Case Link Request

SSP accounts are at the Person Level and automatically link to all cases in which the person is associated if there is a 100% match. Case link requests display for each County in which the Primary Applicant is not marked as Permanently Out of the Home in a case. Users can only view the Case Link Requests for their own County.

Example: If the Primary Applicant is associated to 3 cases in County A and two cases in County B; two case link requests are generated; one for County A and one for County B.

When a user processes the case link request in one county all case link requests associated to the same Primary Applicant, that were generated as part of that case link request, are updated to a Processed status.

Example: When County A processes the case link request, both of the Case Link requests for that Primary Applicant are updated to a Processed status. Case Link requests for the Primary Applicant in Processed status no longer display on the Case Link Request Search page based on the default Search Results.

If the customer submits more than one request at different times, then those must be processed separately.

This step-by-step begins when the link request is received from the Self-Service Portal and the customer's identity has been verified.

| 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: <ul style="list-style-type: none"> a) Enter the <Registrant First Name and/or Registrant Last Name> in the Registrant First and Last Name fields. Note: Spelling must be exact for this search. b) Click the Search button. c) Click the Submit button for the <Registrant Name being Processed> in the Search Results Summary page section. |
| 5. | On the Select Person page: <ul style="list-style-type: none"> a) Click the Search button. Note: The Information the registrant entered on the SSP prepopulates. b) Click the Name radio button for the appropriate person. Note: There may be multiple search results for the registrant. The user should determine the correct person to select. c) Click the Select button. |
| 6. | On the Case Link Select Person Summary page: The information provided by the registrant displays along with the CalSAWS person information. <ul style="list-style-type: none"> a) If the person information appears to match what was provided by the registrant, click the Continue button and go to step 6c. Note: The Linked Status field updates to Processed. b) If the person information does not appear to match, click the Cancel button, and return to step 5. c) If the customer is already linked to another SSP account or is not the Primary Applicant on the case, a Validation message displays. d) Click the Reject button. e) Click the Close button. |

Rejecting a Case Link Request

Counties may consider rejecting a Case Link Request for various reasons. Possible scenarios may 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

If a County Rejects a Case Link Request, the System does not Reject any of the associated Case Link Requests. Those individual case link requests remain open until Processed or Rejected by the impacted Counties.

Example: If the Primary Applicant is associated to 3 cases in County A and two cases in County B; two case link requests generate; one for County A and one for

County B. If County A then decides to Reject the case link request; the case link request for County B remains in a Pending status.

This step-by-step begins when the link request is received from the SSP.

| 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) Enter the <Registrant First Name and/or Registrant Last Name> in the Registrant First and Last Name fields. Note: Spelling must be exact for this search. b) Click the Search button. c) Click the Submit button for the <Registrant Name being Processed> in the Search Results Summary page section. |
| 5. | On the Select Person page: a) Click the Search button. Note: The Information the registrant entered on the SSP prepopulates. b) Click the Name radio button for the appropriate person. Note: There may be multiple search results for the registrant. The user should determine the correct person to select. c) Click the Select button. |
| 6. | On the Case Link Select Person Summary page: The information provided by the registrant displays along with the CalSAWS person information. a) Click the Reject button. Note: If the customer is already linked to another SSP account or is not the Primary Applicant on the case, a Validation message displays. b) Click the Close button. |

Unlinking a Primary Applicant from a Self-Service Portal Account

Users with the appropriate security rights can unlink a Primary Applicant from a SSP account, in certain circumstances. When a Primary Applicant is unlinked from their SSP account all associated cases are unlinked as well. When staff unlink a primary applicant from a SSP account the system auto generates a Case Link request for that primary applicant. Counties should follow their county's business process to reject or process the auto generated Case Link Request.

This step-by-step starts after a person has been linked to a SSP account.

| Step | Action |
|------|---|
| 1. | Place the cursor over Case Info on the Global navigation bar. |

| Step | Action |
|------|--|
| 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 appropriate search information. b) Click the Search button. |
| 6. | On the Select Person page: a) Click the Name 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. |