

CalSAWS | Quick Guide – Linking and Unlinking Self-Service Portal Accounts

Purpose: The purpose of the CalSAWS Quick Guide is to provide the end-user with functional instructions on how to link and unlink a Self-Service Portal account in CalSAWS.

The CalSAWS Quick Guide can be used as a training medium for the following situations:

- For displaying CalSAWS functional processes and changes
- To summarize and repeat key points from a Web-Based Training (WBT) or Job Aid

The CalSAWS Quick Guide may include functional instructions, as well as screenshots from the CalSAWS System. It may highlight new functional processes, pages, page sections, fields, drop list values, etc.

Topic: Linking and Unlinking Self-Service Portal Accounts

CalSAWS System Process:

In CalSAWS, users can manually link or unlink Self-Service Portal (SSP) accounts to a person in CalSAWS when needed. In most situations, SSP accounts link automatically if 100% of the data matches CalSAWS and the customer has verified their identity through Multi-factor Authentication (MFA) email or text verification. When the SSP Application Programming Interface (API) encounters a mismatch or is unable to self-verify, a case link request is added to the Case Link Request Search page for processing and a user must link the account manually. Case link requests should be processed only after the identity of the customer has been verified by the user in order to prevent incorrect or fraudulent accounts from being linked to cases.

Identity Verification

A customer who wants to link their SSP account to their case must submit the request in BenefitsCal with the following information:

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

After entering the information, the customer must verify their identity through MFA email or text verification. The customer is sent a link to the email address or phone number that is listed on the Contact Detail page in their CalSAWS case. The email address does not have to be the same email address used for their SSP account. For text verification, only phone numbers with the Type of Cell, Main, Message, Home or Work can be used.

If the email address or phone number is incorrect or needs to be updated, customers must contact the County to make the update. Once the information has been updated, customers can retry to link their SSP account. Customers who do not wish to provide their email address or phone number are unable to link their SSP account.

Note: Customers do not have to opt-in to receiving text messages from CalSAWS to do MFA. They just need to provide their phone number.

The steps below outline the process for updating a customer's email address and/or phone number:

1. Place the cursor over **Eligibility** on the **Global** navigation bar
2. Select **Customer Information** from the **Local** navigator
3. On the **Contact Summary** page, click the **Edit** button for the primary applicant on the **Contact Information** page section
4. On the **Contact Detail** page, enter **<E-mail Address>** in the **E-mail Address** field
5. In the **Phone Numbers** page section, enter **<Phone Number>** in the **Number** field
6. Select **<Phone Number Type>** from the **Type** drop list

Note: As a reminder, the only types that allow for text verification are Cell, Home, Message, Main or Work.

Contact Detail

*- Indicates required fields

Save

Save and Return

Cancel

Name: *

E-mail Address:

test@email.com

IVR PIN:

Reset PIN

IVR PIN Updated On:

04/25/2024 1:26:03 PM

Voice Print

No

☐ Allow E-mail Reminder

E-Notification:

▼

E-mail Status:

Customer ID:

Phone Numbers

Number

Type *

IVR Consent

Text Message

Text Message Status

☐

(222)333-4444

ext.

▼

▼

▼

Add

Remove

Cell
Fax
Home
Message
Main
TDD
Toll Free
Work

Remove All

Save

Save and Return

Cancel

7. Click the **Save and Return** button

Accessing Case Link Requests

When an SSP account is not automatically linked, a case link request is sent to the County to process the request manually. The requests can be found on the Case Link Request Search page and are County specific.

If the customer has cases in multiple Counties, each County may receive a case link request for any case(s) where the customer is the Primary Applicant for a program(s) and is not marked as Permanently Out of the Home within the case. Once a user processes a case link request in one

County all case link requests submitted at the same time that are associated to the same Primary Applicant are updated to a Processed status. If the customer submits more than one request at different times, then those must be processed separately.

The steps below outline the process for locating case link requests:

- 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

On the Case Link Request Search page, all County unprocessed case link requests display. However, you can conduct a search to locate a specific case link request by entering the appropriate search criteria and then clicking the Search button.

Case Link Request Search

*- Indicates required fields

Unlink

Search

Registration Status: *

Pending

Registrant First Name:

Registrant Last Name:

Request Date Range

Begin Date:

02/01/2024

End Date:

05/01/2024

Results per Page: 25

Search

Search Results Summary

Results 1 - 25 of 33

1

2

Next

Registrant Name	Request Date	Request Type	Request Status
<div></div>	05/01/2024	Link	Pending

Submit

Prior to processing a case link request, you are also able to review it by clicking the Registrant Name hyperlink in the Search Results Summary page section to navigate to the Case Link Select Person Summary page.

Search Results Summary

Results 1 - 25 of 33

1

2

Next

Registrant Name	Request Date	Request Type	Request Status
<div></div>	05/01/2024	Link	Pending

Submit

The Case Link Select Person Summary page displays the details of the person making the request along with any cases they may be associated to. You can click the Case Number hyperlink to navigate to the Case Summary page of any of the cases listed. After reviewing this page, follow your County's policy and procedures to determine if the case link request can be processed.

Case Link Select Person Summary

[Close](#)**Case Number:**

[REDACTED]

Linked Status:

Pending

First Name:

[REDACTED]

Middle Name:**Last Name:**

[REDACTED]

SSN:

[REDACTED]

Date of Birth:

[REDACTED]

Gender:

Male

Address Line 1:

[REDACTED]

City:

Fargo

State:

CA

Zip Code:

84218

Phone Number:

Once you are done reviewing the request, you can click the Close button to navigate back to the Case Link Request Search page.

Processing a Case Link Request

After reviewing a case link request and verifying the customer's identity the user can proceed with taking action.

The steps below begin on the Case Link Request Search page and outline the process for completing a case link request to manually link an SSP account:

1. On the **Search Results Summary** page section of the **Case Link Request Search** page, click the **Submit** button for the appropriate **Registrant Name**.

Search Results Summary				Results 1 - 25 of 33
				1 2 Next
Registrant Name	Request Date	Request Type	Request Status	
 [REDACTED]	 05/01/2024	Link	Pending	Submit

- On the **Select Person** page, confirm the customer's information that pre-populates based on the case link request or update, if necessary, then click the **Search** button

Select Person

Search

Case Number:	Social Security Number:	CIN:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name:	First Name:	Middle Name/Initial:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date Of Birth:	Gender:	
<input type="text"/>	Male <input type="button" value="v"/>	
Phone Number:		
<input type="text"/>		
Address Type:		
<input type="button" value="v"/>		
Address Line 1:		
<input type="text"/>		
Address Line 2:		
<input type="text"/>		
City:	State:	ZIP Code:
High Point <input type="text"/>	CA <input type="button" value="v"/>	84802 <input type="text"/>
<input checked="" type="checkbox"/> Include Phonetic Search Results		

- On the **Search Results Summary** page section, click the **Name** radio button next to the appropriate person and then click the **Select** button

Select Person

► Refine Your Search

Search Results Summary

Results 1 - 25 of 61

1 2 3 Next

Select

Cancel

Name	SSN	DOB	Alien#	CIN	Address
<input checked="" type="radio"/> <input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>

- On the **Case Link Select Person Summary** page, confirm the information is valid and click the **Continue** button to finish processing the case link request

Note: You can also click the Reject button to reject the case link request or the Cancel button to go back to the Select Person page to search again for the correct person record. Additional instructions for rejecting a case link request provided in the Rejecting a Case Link Request section of this guide.

Case Link Select Person Summary

Continue			Reject	Cancel
Case Number: [Redacted]		Linked Status: Pending		
First Name: [Redacted]	Middle Name:	Last Name: [Redacted]		
SSN: [Redacted]	Date of Birth: [Redacted]	Gender: Male Male		
Address Line 1: [Redacted]	City: Fargo High Point	State: CA CA		
Zip Code: 84218 84802				
Phone Number:				

After clicking the Continue button, the Case Link Select Person Summary page refreshes to display the Linked Status as Processed.

Case Link Select Person Summary

			Close
Case Number: [Redacted]		Linked Status: Processed	
First Name: [Redacted]	Middle Name:	Last Name: [Redacted]	

You can click the Close button to navigate back to the Case Link Request Search page.

Rejecting a Case Link Request

A case link request can also be rejected when determined appropriate by the County. Some scenarios include:

- Any of the associated cases have an active Children Services program
- The Primary Applicant has an active Customer Privacy record

In certain scenarios the System displays a validation message and does not allow the user to link an account, it only has the option to Reject the request.

- The person requesting the case link is not the Primary Applicant for on any program on the case
 - Validation message: Unable to link the person to this account, <Name> is not the Primary Applicant listed on this case.

Case Link Select Person Summary

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

Reject

Cancel

Case Number:

[REDACTED]

Linked Status:

Pending

First Name:

[REDACTED]

Middle Name:

Last Name:

[REDACTED]

SSN:

[REDACTED]

Date of Birth:

[REDACTED]

Gender:

Male
Female

Address Line 1:

[REDACTED]

City:

Akron
Palm Bay

State:

CA
CA

Zip Code:

80640
80640

Phone Number:

[REDACTED]

- The Global Unique Identifier (GUID), an identifier that supports case linking logic and confirms a user's identification, is already linked to another account
 - Validation message: Unable to link person to this account; <Name> is already linked to another account.

Case Link Select Person Summary

Unable to link person to this account; [REDACTED] is already linked to another account.

Reject

Cancel

Case Number:

[REDACTED]

Linked Status:

Pending

First Name:

[REDACTED]

Middle Name:

Last Name:

[REDACTED]

SSN:

[REDACTED]

Date of Birth:

[REDACTED]

Gender:

Male

Male

Address Line 1:

[REDACTED]

City:

Akron

Akron

State:

CA

CA

Zip Code:

80640

80640

Phone Number:

[REDACTED]

- The person is already linked to an account
 - Validation message: This person is already linked to an E-Application account.

Case Link Select Person Summary

This person is already linked to an E-Application account.

Reject

Cancel

Case Number:

[REDACTED]

Linked Status:

Pending

First Name:

[REDACTED]

Middle Name:

Last Name:

[REDACTED]

SSN:

[REDACTED]

Date of Birth:

[REDACTED]

Gender:

Female

Address Line 1:

[REDACTED]

City:

Fort Worth

State:

CA

Zip Code:

84490

Phone Number:

After following your County process to determine if a case link request should be rejected, navigate to the Case Link Request Search page to reject the request.

The steps below outline the process for rejecting a case link request:

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, click the **Submit** button for the appropriate Registrant Name

Case Link Request Search

*- Indicates required fields

Unlink

Search

Registration Status: *

Pending ▼

Registrant First Name:

Registrant Last Name:

Request Date Range

Begin Date:

02/01/2024



End Date:

05/01/2024



Results per Page: 25 ▼

Search

Search Results Summary

Results 1 - 25 of 33

1 2 [Next](#)

Registrant Name	Request Date	Request Type	Request Status
 [REDACTED]	 05/01/2024	Link	Pending Submit

5. On the **Select Person** page, confirm the customer's information that pre-populates based on the case link request, then click the **Search** button

Select Person

Search

Case Number:	Social Security Number:	CIN:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name:	First Name:	Middle Name/Initial:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date Of Birth:	Gender:	
<input type="text"/> 	Male <input type="button" value="v"/>	
Phone Number:		
<input type="text"/>		
Address Type:		
<input type="button" value="v"/>		
Address Line 1:		
<input type="text"/>		
Address Line 2:		
<input type="text"/>		
City:	State:	ZIP Code:
High Point <input type="text"/>	CA <input type="button" value="v"/>	84802 <input type="text"/>
<input checked="" type="checkbox"/> Include Phonetic Search Results		

6. On the **Search Results Summary** page section, click the **Name** radio button next to the appropriate person and then click the **Select** button

Select Person

► Refine Your Search

Search Results Summary

Results 1 - 25 of 61

1 2 3 Next

Select

Cancel

Name	SSN	DOB	Alien#	CIN	Address
<input checked="" type="radio"/>  <input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>

7. On the **Case Link Select Person Summary**, click the **Reject** button

Case Link Select Person Summary

<div>Continue</div> <div>Reject</div> <div>Cancel</div>		
Case Number: [REDACTED]		Linked Status: Pending
First Name: [REDACTED]	Middle Name:	Last Name: [REDACTED]
SSN: [REDACTED]	Date of Birth: [REDACTED]	Gender: Male Male
Address Line 1: [REDACTED]	City: Fargo High Point	State: CA CA
Zip Code: 84218 84802		
Phone Number:		

After rejecting a case link request the Linked Status updates to Rejected. If there are additional associated case link requests for the Primary Applicant in other Counties, the System does not reject them as well. They remain pending until acted on by the impacted Counties.

Unlinking an SSP Account

Users with the appropriate security rights can also unlink SSP accounts when needed. When a Primary Applicant is unlinked from their SSP account all associated cases are unlinked as well and the System auto generates a Case Link request for that Primary Applicant.

The steps below outline the process for unlinking SSP accounts:

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, click the **Unlink** button

Case Link Request Search

*- Indicates required fields

Unlink

Search

Registration Status: *

Pending ▼

Registrant First Name:

Registrant Last Name:

Request Date Range

Begin Date:

02/01/2024



End Date:

05/01/2024



5. On the **Select Person** page, enter the appropriate search criteria and then click the **Search** button
6. On the Select Person page, click the **Name** radio button for the appropriate person record and then click the **Select** button

Select Person

► Refine Your Search

Search Results Summary

Results 1 - 25 of 61

1 2 3 [Next](#)

Select

Cancel

	Name	SSN	DOB	Alien#	CIN	Address
<input type="radio"/>	[REDACTED]	-	[REDACTED]		[REDACTED]	[REDACTED]
<input checked="" type="radio"/>	[REDACTED]	[REDACTED]	[REDACTED]		[REDACTED]	[REDACTED]

7. On the **Case Link Select Person Summary**, click the **Unlink** button.

Case Link Select Person Summary

Unlink

Cancel

Case Number:

[REDACTED]

First Name:

[REDACTED]

Middle Name:

Last Name:

[REDACTED]

SSN:

[REDACTED]

Date of Birth:

[REDACTED]

Gender:

Male

Address Line 1:

[REDACTED]

City:

Fargo

State:

CA

Zip Code:

84218

Phone Number:

After clicking the Unlink button, the System displays a message stating: This person is not linked to any E-Application account.

Case Link Select Person Summary

This person is not linked to any E-Application account.

Close

Case Number:

[REDACTED]

First Name:

[REDACTED]

Middle Name:

Last Name:

[REDACTED]

You can click the Close button to navigate back to the Case Link Request Search page.