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

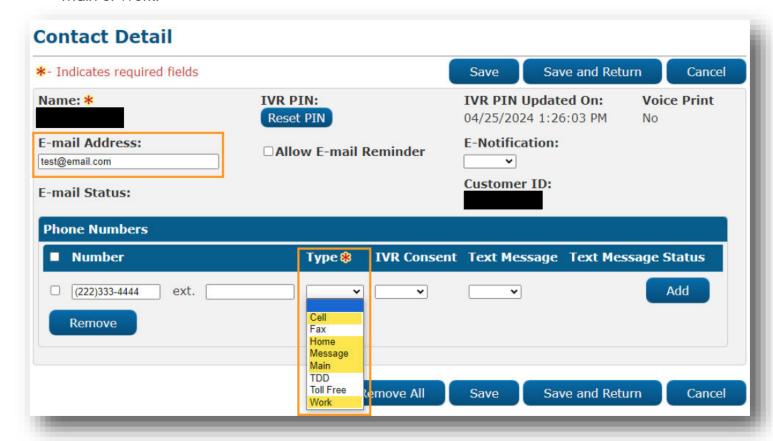
After entering the information, the customer must verify their identity through MFA email or text verification. The customer is sent a link to the email address or phone number that is listed on the Contact Detail page in their CalSAWS case. The email address does not have to be the same email address 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
- 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.



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.



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.



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.



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

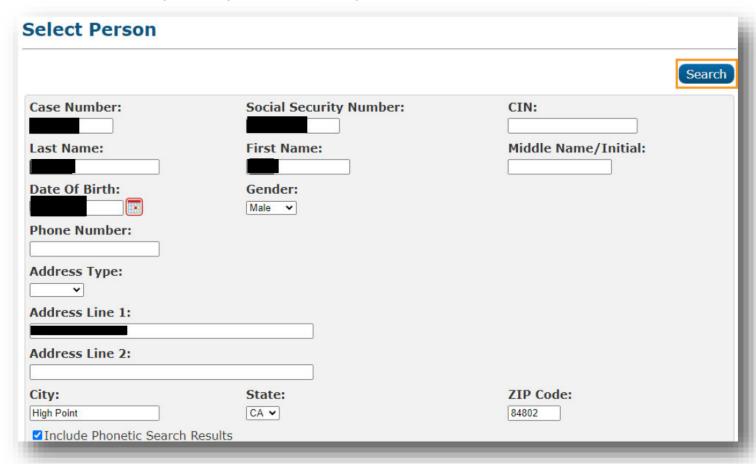
After reviewing a case link request and verifying the customer's identity the user can proceed with taking action.

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:

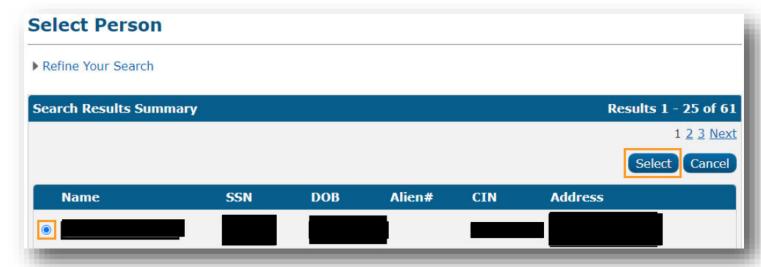
 On the Search Results Summary page section of the Case Link Request Search page, click the Submit button for the appropriate Registrant Name.



2. 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



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



4. 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.



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



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.

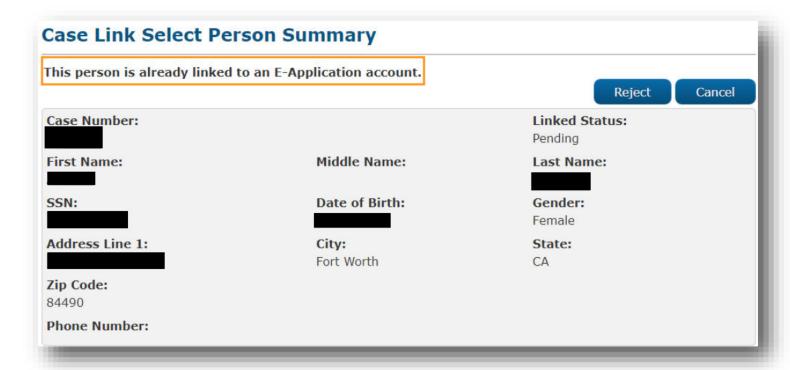
- The person requesting the case link is not the Primary Applicant for on any program on the case
 - Validation message: Unable to link the person to this account, <Name> is not the Primary Applicant listed on this case.



- 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.



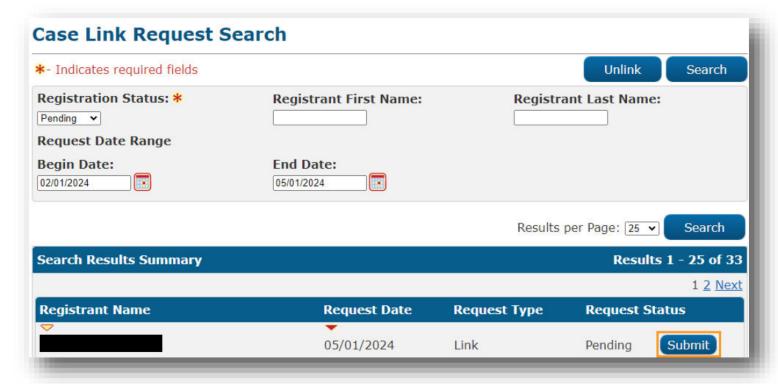
- The person is already linked to an account
 - o Validation message: This person is already linked to an E-Application account.



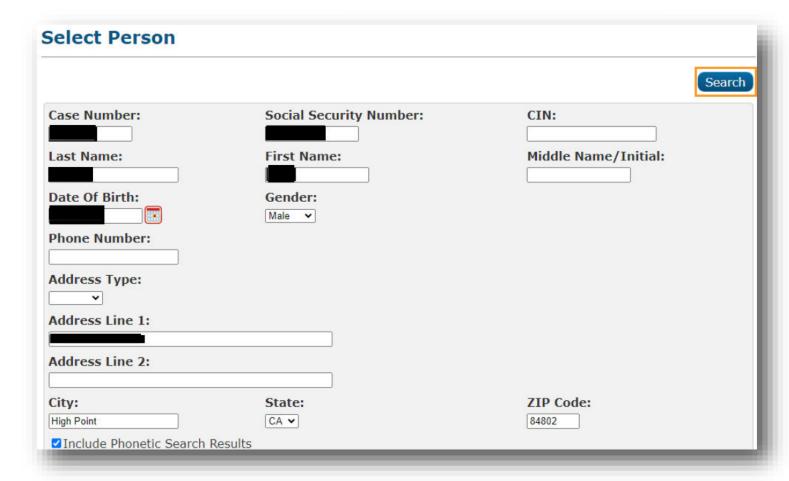
After following your County process to determine if a case link request should be rejected, navigate to the Case Link Request Search page to reject the request.

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

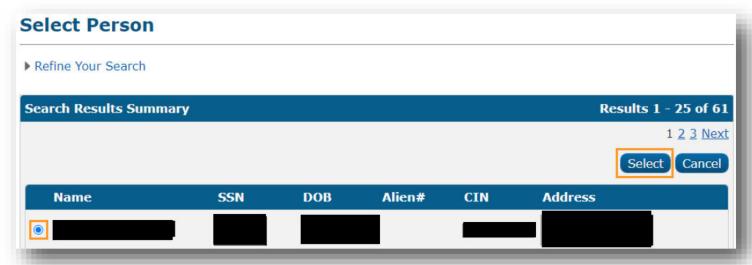
- 1. Place the cursor over Case Info on the Global navigation bar
- 2. Select e-Tools from the Local navigator
- 3. Click the Case Link Request link on the Task navigation bar
- 4. On the Case Link Request Search page, click the Submit button for the appropriate Registrant Name



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



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



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



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

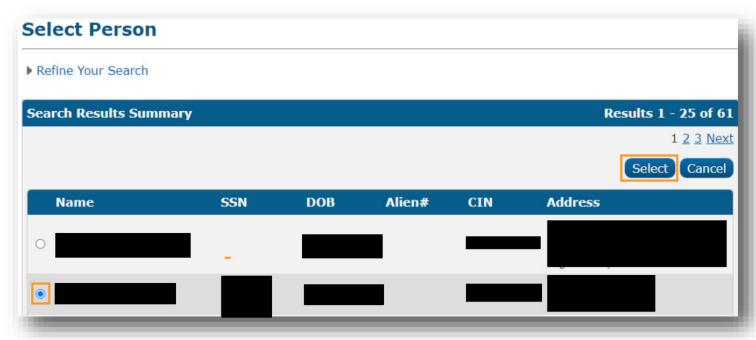
Users with the appropriate security rights can also unlink SSP accounts when needed. When a Primary Applicant is unlinked from their SSP account all associated cases are unlinked as well and the System auto generates a Case Link request for that Primary Applicant.

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



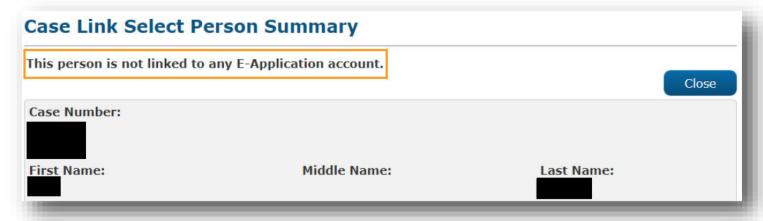
- 5. On the **Select Person** page, enter the appropriate search criteria and then click the **Search** button
- 6. On the Select Person page, click the **Name** radio button for the appropriate person record and then click the **Select** button



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



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



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