



Your destination for affordable,
quality health care, including Medi-Cal



JOB AID: LINK A CONSUMER ACCOUNT TO AN EXISTING APPLICATION

June 17, 2014

Account Linking in CalHEERS

This Job Aid shows how to link a new Consumer account to an existing application. This procedure, performed by both Service Center Representatives (SCRs) and County Eligibility Workers (CEWs), requires some interaction with the Consumer to complete.

Note: These steps do not apply to Consumers who have created accounts and initiated applications prior to interacting with a SCR or CEW. This process also does not apply to Certified Enrollment Counselors, Certified Insurance Agents, or Enrollment Entities, as Consumers accounts are linked to these users by designation requests and must have an account prior to creating an application.

The Account Linking process connects an application, completed on behalf of a consumer by a SCR or CEW, with a newly created account, at the time the Consumer creates it on CoveredCA.com. The application is linked to the account by an **Access Code**.

The Access Code is a case sensitive, six-digit string, similar to the Delegation Code for an Authorized Representative. There are two ways to generate an **Access Code** that can later be used by the Consumer for the Account Linking process:

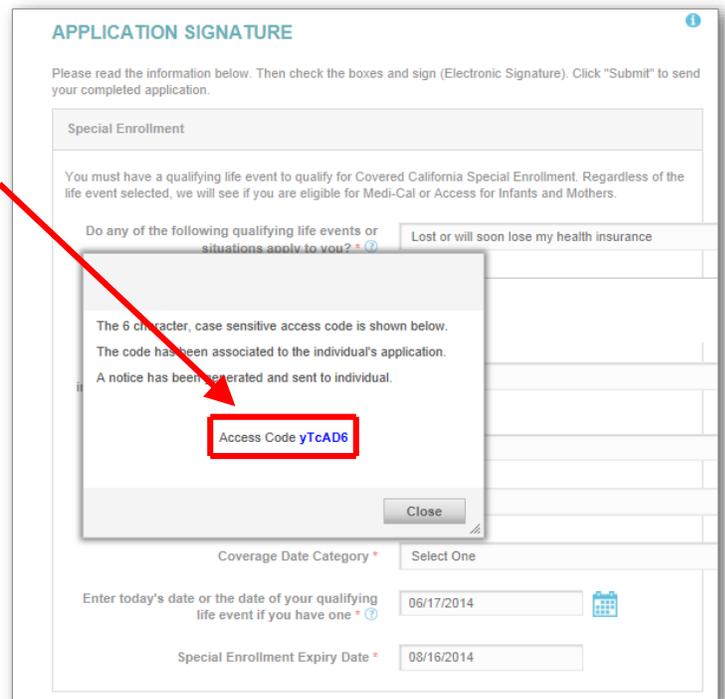
1. From the *Application Signature* page – when the SCR or CEW submits the Consumer's application, the **Access Code** displays in a popup message. The SCR/CEW provides the **Access Code** to the Consumer so the Consumer can create their CalHEERS account and link it to the existing application. CalHEERS also sends a notice containing the **Access Code** to the Consumer.
2. From the *Search Individual* page – after the application is submitted, the SCR/CEW can use the *Search Individual* page to locate the Consumer and generate a new **Access Code**.

The following pages illustrate the steps for Account Linking.

JOB AID: LINK A CONSUMER ACCOUNT TO AN EXISTING APPLICATION

Account Linking on the Application Signature Page

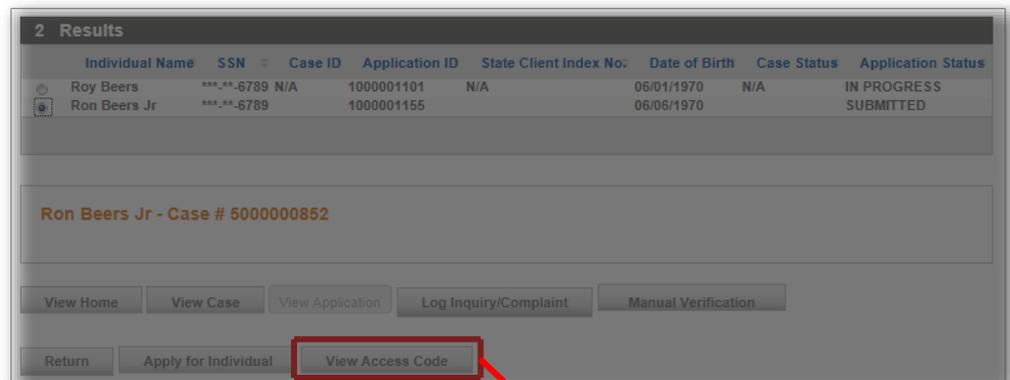
When the SCR/CEW clicks the **Submit** button on the *Application Submission* page, CalHEERS generates the **Access Code** and displays it in a popup. A new process also sends the **Access Code** to the Consumer in a notice. The SCR/CEW can also provide the **Access Code** to the Consumer directly to facilitate the process.



The screenshot shows the 'APPLICATION SIGNATURE' page. A popup window is displayed in the center, containing the following text: 'The 6 character, case sensitive access code is shown below. The code has been associated to the individual's application. A notice has been generated and sent to individual.' Below this text, the 'Access Code yTcAD6' is displayed in a red-bordered box. A 'Close' button is located at the bottom right of the popup. A red arrow points from the text in the first paragraph to the popup.

Account Linking on the Search Individual Page

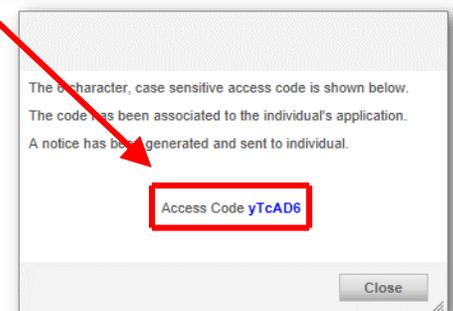
The SCR/CEW can generate a new Access Code after searching for a Consumer on the *Search Individual* page. If the Consumer is found, the Consumer's name and Case ID appears in the results list. Use the radio button to the left of the listing to select the name. The new **View Access Code** button displays at the bottom of the page. Click on the **View Access Code** button to display a popup with the new **Access Code**. CalHEERS will automatically send the number in a notice to the Consumer. The SCR/CEW can also communicate the number to the Consumer as needed to facilitate the process.



The screenshot shows the 'Search Individual' page with search results. The results table is as follows:

Individual Name	SSN	Case ID	Application ID	State Client Index No.	Date of Birth	Case Status	Application Status
Roy Beers	***-**-6789	N/A	1000001101	N/A	06/01/1970	N/A	IN PROGRESS
Ron Beers Jr	***-**-6789		1000001155		06/06/1970		SUBMITTED

Below the table, the selected individual is identified as 'Ron Beers Jr - Case # 5000000852'. At the bottom of the page, there are several buttons: 'View Home', 'View Case', 'View Application', 'Log Inquiry/Complaint', 'Manual Verification', 'Return', 'Apply for Individual', and 'View Access Code'. A red arrow points from the 'View Access Code' button to the popup in the next image.



The screenshot shows a popup window with the following text: 'The 6 character, case sensitive access code is shown below. The code has been associated to the individual's application. A notice has been generated and sent to individual.' Below this text, the 'Access Code yTcAD6' is displayed in a red-bordered box. A 'Close' button is located at the bottom right of the popup. A red arrow points from the 'View Access Code' button in the previous image to this popup.

Consumer steps in Account Linking

Once the Consumer has the **Access Code** they can create a CalHEERS account and link the account to their existing application.

During the account creation process, The Consumer is prompted to enter the **Access Code** on the *Create Account – User Information* page, after they click the **Yes** radio button for **Do you have an existing case that you would like to link to this new account?**

When the Consumer completes the account creation process and logs into CalHEERS, their account will be available for viewing, with the **Report a Change** button active on the Consumer’s home page.

SET UP AN ACCOUNT

Use of This Website

2. User Information

3. Contact Information

4. Username/Password

5. Account Summary

USER INFORMATION

* Indicates a required field.

*First Name

*Last Name

*Date of Birth

Social Security number

*Preferred method of communication

*Do you have an existing case that you would like to link to this new account? Yes No

Enter your Access Code