

Date: April 27, 2021	Notes Location: Teams
Time: 10:00 am – 12:00 pm	Meeting Materials: Self-Service Portal Agenda 4-27-21
Meeting Called by: Iadira Morales	

Attendees: Region 1: Ali, Muller, Jerry Kulper, Jennie Evins,
Region 2: Julia Scheuermann, Lana Fomichev, Patty Armenteros, Michelle Fell
Region 3: Appolonia Coan, Jolie Thompson (for Samantha Bonkowski)
Region 4: Cheryl Armstrong, Robert Delsid, Martha Esparza
Region 5: Belinda Lemos, Jason Garrett (for Brian Nelson), Nahum Abraham (for Kris Call), Luke Delacruz
Region 6: Armando Gonzalez, Lilit Afrikyan (for Fabiola Totado-Martinez), John Loyarte, Nicole Williams

Topic

Integration Team

- Demos: Case Linking Demo

Important Points

- Successful Linking through API get 201 when can match to system.
- Manual Linking get 202, go into e-tools in CalSAWS to find request. Shows info to compare for person worker is reviewing to link to vs the account info. 203 code is for information from a person who is not a primary applicant.
- Eric in Santa Cruz asked manual is only if it does not auto link correct? Yes that is correct.
- Cheryl asked will we get the materials that go through the API functionality in writing? Yes. Is there a list of reasons why they would not being linked? Few reasons: if someone comes into the BenefitsCal system and improper data is entered and they can't be found. Not a primary applicant on the case. If somehow in the system it is a duplicate record (such as twins in same home). If someone needs to unlink a case due to incorrect linking, and then be relinked to correct case.
- Martha asked if API for all case members or just primary applicant? Just primary applicant.
- Phillip asked if customer is notified if linking is pending or rejected. Will send a message once complete or failed.
- Crystal asked would this be helpful to help customers who can't remember or access their accounts for c4yourself but want to enroll in BenefitsCal and link?
- Betty asked Will CalSAWS provide a journal entry if linking is rejected? No, but that could be an enhancement request.
- Phillip asked are customers allowed to submit documents if the linking is pending? No.
- Foster Care data is not sent. Case confidentiality is currently in design – a case privacy page that locks the data down.

- Martha asked is this is where all the cases that are not able to be linked in migration will go? This page would only need to be accessed in duplicate record situation – otherwise a person can manually link themselves by putting in the data in the BenefitsCal system. This is not related to the conversion efforts.
- GetCF linking issue where system has to “delink” a dummy account from the GetCF app in order to link the C4Y account – is this still an issue or has this been assessed for? Still being researched although not believed it will be an existing problem.
- Ms. Anna GetCF update: working with them regarding their access with BenefitsCal. If GetCF submits an application using the existing design, then the application goes in to CalSAWS in e-tools and that goes through the regular process of the workers needing to work that app from BenefitsCal and will not override anything the way it does in C-IV currently.
- Is the customer notified if they can't upload documents due to pending case linking. You can upload the documents but they will not go to CalSAWS until linking is successful if the customer is submitting an application.

Deloitte

- BenefitsCal communication plan
- Training Strategy Plan
- Get CalFresh: Updates on talks

- Matt Spurrier Communications Lead communication plan with centralized communication model.
- Awareness, education, adoption and retention #EngagePeopleBetter.
- Campaign awareness, internal education, external education, adoption
- Campaign timing to help customers – such as those customers needing to complete Renewals/reports are invited first. Not all customers need access on the very first day we go live. Want to strategize who gets access first to help workload for counties and call centers etc. Support urgent access first.
- Checking in long before go live date and frequently.
- Counties can start expecting preparation materials in May.
- Counties will receive customer materials before they get sent to customers to allow for counties to understand and support the messaging.
- Feedback requested.
- No mobile app, it is a mobile responsive website.
- Will county specific information be able to be sent out to customers? Announcements can be tailored by county for BenefitsCal.
- Joyce Siller Training Strategy Plan. Customer short videos. Staff word documents easy to search and find. Customer questions often about password and document upload. Staff wants to know what customer facing side is like in order to better assist. Customer

Topic

Important Points

facing stuff like videos will be in LMS so staff can access and view as needed continuing forward.

- Inventory proposed: 18 videos, 20 quick ref guides, 1 user guide, and 5-6 scenarios to try in training environment.
- Question for Committee, how should we track training of internal stakeholders? By view? By quiz? Other? Quiz was popular response. Question going to TAC as well.

Open CRFI/CIT

- CIT 0046-21
- CIT 0051-21

- Updating user emails and phone numbers for migration – no lists possible at this time.

Deliverable Documents for Application Process

- Approved to share the application process and documents, email went out. May 4th meeting will go over deliverables and will allow for counties to be guided through the design documents.

Next meeting May 25, 2021

(Optional Items)

#	Action Item	Assigned To	Assigned Date	Due Date	Status
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1

2

#	Decision Made	Who Made the Decision	Date
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