

Date: February 23, 2021	Notes Location:
Time: 11:00-12:00	Meeting Materials:
Meeting Called by: Iadira Morales	
Attendees: Region 1: Alli Muller, Jerry Kulper, Claudia Rodriguez, Jennie Evins Region 2: Amy Bryer, Julia Scheuermann, Lana Fomichev, Patty Armenteros, Tou Yang Region 3: Appolonia (Apple) Coan, Samantha Bonkowski, Shala Wade-Medlin, Tammy Burgoyne Region 4: Cheryl Armstrong, Cheryl Lyles, Kristine Maxwell, Martha Esparza, Robert Delsid Region 5: Adriana Lechuga, Belinda Lemos, Brian Nelson, Kris Call, Luke Delacruz Region 6: Armando Gonzalez, Fabiola Tostado-Martinez, John Loyarte, Juan Herrera, Nicole Williams	

Topic

Deloitte Presentation- Gabrielle Otis

- CalSAWS Portal/Mobile Highlights
 - Branding- search engine optimization for high search results
 - Developments and Operational readiness are on track for the project
- Portfolio- Readiness Timeline
 - Communications- in planning phase
 - Testing- designing test cases
- Upcoming Testing Opportunities
 - The system will open to a small group of users to test and validate
 - Interest in testing- send message to Ana Chao or Gabrielle Otis
- Real-Time Interface
 - Real-time between BenefitsCal and CalSAWS
 - Including, but not limited to document upload, applying for benefits, redetermination, periodic reports, checking benefits, viewing correspondence
- BenefitsCal Document Upload
 - Visual of desktop and mobile application
- Planning for and measuring the Customer Experience (CX)
 - Currently in round 3 (February-March)
 - If working with a CBO, reach out to Brooke for testing.
 - Customer Experience (CX)- feedback will be collected to see trends
 - UCD Discovery- focused groups
- Customer and Data Research
 - 48% of the customers learned about CA Benefits Website through their caseworker
 - Only 16% found site through a search engine
 - Initially, there is a drop in the ability to locate portals through online searches when the new code is released
- Insight
 - Partner websites will be asked to update their websites to redirect the customers to the new portal
- Open Dialogue

- Which accounts will convert to the new portal?
 - If the account has been accessed in the past two years, they will convert
 - What will the customer need to access their account?
 - Username and password
 - User will be prompted to create a new password
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BenefitsCal and CalSAWS – Jerry Nealson

- Modernize interfaces to ensure data is real-time or near real-time, available within a few seconds, as fast as the network allows. Larger files will take longer to be delivered.
 - Working closely with CalSAWS team, testing cases.
 - There will not be batch jobs.
 - Open dialogue
 - What is the time frame for document availability?
 - As fast as the network allows. Larger files will take longer.
 - What happens if documents are submitted and not recognized by OCR?
 - Referred to Highland system for answer
 - When customer uploads documents, they select the upload type. If the system does not realize the image, it will be placed in a bucket.
 - Back-up for imaging- Exception documents will be available. Will need to click "View Related Documents". Must click one extra button.
 - Personal level documents- if it is associated, they will be available to that case.
 - When a customer uploads documents, will the worker be able to view it instantly?
 - Once the document is uploaded, it can be viewed instantly, depending on the size of the document.
 - Documents go directly to an imaging system versus a queue
 - For SAR 7s and RE- client can sign and submit.
 - The state released redesigned Medi-Cal renewal forms, will BenefitsCal contain the updated version?
 - The updated version will be used. The questions on the form will be represented in pages, not a form. The three renewal forms will be available.
 - Will there be support available to customers with issues with the portal?
 - Training guide videos are being produced for customers and call centers
 - Release 4.0 (a future release) will include a co-browsing feature
 - Counties will have a training environment
 - Post go-live team will be available for 3 months after the
 - Wireframes on upload process
 - Multiple documents may be uploaded
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Foster Care Section on e-Application Person Detail – Melissa Mendoza

- API was recreated- new format
 - Updates to Foster Care section
 - Added 2 additional questions
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Topic

- Was “customer” in Foster Care in any state on their 18th birthday?
- Do you want “customer” counted in your CalFresh case?
- Updated e-Application personal detail with email and phone type
- Open dialogue
 - Will there be support for customer that cannot remember their C4Yourself accounts?
 - User is to create a new username and password/ set up a new account
 - Will not be able to authenticate
 - CIT is going out to counties to update information such as phone numbers and email
 - Be cognizant of these fields to help with migration (this will be added as a future agenda item)
 - CalWIN has a window to look up portal clients' credentials, will CalSAWS also have this feature?
 - Currently, there is no requirement for CalSAWS

Additional Items

- The Self-Service Portal Committee Update presentation will be posted on the web portal
- Meetings will be held monthly
 - Next meeting to be held in March

(Optional Items)

#	Action Item	Assigned To	Assigned Date	Due Date	Status
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#	Decision Made	Who Made the Decision	Date
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