

Purpose: To document County questions regarding BenefitsCal.

Q&A

| # | Function | Question | Response |
|---|--------------------|---|--|
| 1 | Log-In | What will happen in a worst-case scenario to the C4Yourself Customers who have not had their account login credentials addressed and/or resolved at Go Live? As an example: Currently, an unlink of an old account is required and linkage to the case of a new registration request is necessary to resolve the account when the user is unable to retrieve or remember the login credentials? | <p>The C4Yourself customer can create a new BenefitsCal account with a valid email address and link to their case using three of the following to identify who they are: Date of Birth, Zip Code, and either Las 4 digits of their SSN, EBT Card Number, or Case Number.</p> <p>Once a customer logs in to the new BenefitsCal account they will be able to see their worker information, benefit amount, RE and Status Report information, EBT history, etc. Previous applications, Status Reports, and RE's are not being converted (cannot be converted) to BenefitsCal for them to view.</p> |
| 2 | Log-In | If the C4Yourself Account is not resolved at the time of Go Live, will the customer need to resubmit consent for e-Notifications or TEXT Message options if the consented information for Email Address and Phone Number has not changed? | The customer will not need to make any updates to their e-notifications. They will continue to receive emails to the email address that is stored in CalSAWS. |
| 3 | Periodic Reporting | If a SAR 7 is sent out prior to an account being created, and then the customer creates an account, can they retrieve and complete the SAR 7 that was already sent? | The Periodic Report (RE/SAR7) Form Status will be sent from CalSAWS to BenefitsCal portal after the person's BenefitsCal account is linked in CalSAWS and their Periodic Report is due. Periodic Reports generated in CalSAWS prior to BenefitsCal Go Live will not be communicated to the portal. |
| 4 | Appointments | Is there a maximum number of appointments a customer can request? | No |
| 5 | Appointments | Is there an auto journal created when a task is created requesting an appointment? | No |
| 6 | Appointments | For Counties to see the requested appointment from the customer, the | Yes, only those accounts that are linked to CalSAWS will be able to |

| # | Function | Question | Response |
|----|--------------|--|--|
| | | BenefitsCal account needs to be linked to CalSAWS? | request an appointment. If the account is not linked BenefitsCal will not prompt the customer to request an appointment. |
| 7 | Appointments | After the appointment has been completed in CalSAWS, how quickly will the customer be notified in BenefitsCal that the appointment has been created? | It is real time; the customer would see the appointment scheduled in their dashboard as soon as it is set by the worker in CalSAWS scheduling system. |
| 8 | Appointments | When a customer requests an appointment will it create a scheduled appointment in CalSAWS automatically? | No. Appointments are created manually by the worker in CalSAWS via Customer Appointment Detail page. |
| 9 | Appointments | Can a customer request an appointment for same day? | The customer can request preferences for their appointment time am or pm and days of the week, but no specific day or time. |
| 10 | Appointments | If a customer wishes to reschedule their appointment does this cancel the original appointment, or does it remain unchanged until the district can address the task? | When the Customer reschedules an appointment, a task is sent to the Worker. The appointment does not change until the Worker schedules the new date/time per the Customer request. |
| 11 | Appointments | When a customer requests an appointment and a task is created in CalSAWS, who gets the task? | The assigned worker will receive the task, depending on how programs are assigned by County, tasking hierarchy will apply as per all tasks: It will search for the Worker assigned to the program, program hierarchy, unit, office, bank etc. same as it does now. |
| 12 | Appointments | Can tasks be customized appointment action such as schedule/reschedule/cancel? | Schedule and Reschedule requests will create the same task type. Cancel requests will not create a task but updates the existing appointment with a Cancel status. |
| 13 | Appointments | When submitting a new application, can the functionality to request an appointment be used by the customer? | The function cannot be used (BenefitsCal will not prompt them) when they are first applying. A CalSAWS case needs to be linked to their BenefitsCal account for this functionality to be available in BenefitsCal. |
| 14 | Appointments | Can appointments be requested for multiple workers in one session? | The customer can only select the appointment type, not the specific worker. |
| 15 | Case Linking | Will the customer be notified when their case has been linked in CalSAWS? | BenefitsCal messaging allows the customer to be notified by the caseworker. |

| # | Function | Question | Response |
|----|--------------|---|---|
| 18 | Appointments | Can the customer request different appointment type? | <p>Yes, the customer can request an in-person or phone interview. A customer can select from the following choices:</p> <ul style="list-style-type: none"> • General Appointment • GROW (LA Only) • New Application in Person Interview • Provider (LA Only) • In Person Re-Evaluation CalWORKs and CalFresh Interview • In Person Re-Evaluation Interview • Telephone Re-Evaluation CalWORKs and CalFresh Interview • New Application Telephone Interview • Meet with Welfare to Work/Refugee Employment Program Worker • VITA Appointment |
| 19 | Appointments | Can the language be selected for the appointment? | BenefitsCal tracks the preferred language. The worker creating the appointment would know the language. |
| 20 | Application | If someone is indicating homelessness in BenefitsCal, what County address will be populated? | The customer will select the County of residence. |
| 21 | Application | When a customer has a Covered California case, can they add the case number? | Yes, they will be prompted to enter their Covered California case number. |
| 22 | Application | Is the CalFresh (CF) Expedited Services (ES) question asked? | Yes, the ES questions are asked at the end of the application to determine potential ES eligibility based on customer information provided. |
| 23 | Application | Has the BenefitsCal Application process been run by CF Technical Support? The application process is asking many questions for what is required for a CF Application. | CDSS has been present in all BenefitsCal design sessions. They are aware of the current Application for Benefits design and approved it. The customer may also select a "Short App" flow which CDSS also approved. |
| 24 | Application | Is the SSN & DOB optional? | Yes, the SSN is always optional. The Date of Birth is only required for applications that include CalWORKs per policy. |
| 25 | Application | For CalWORKs (CW) can the application be signed by both spouses? | Yes. |

| # | Function | Question | Response |
|---|----------|----------|----------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

DRAFT

