

CalSAWS | Self-Service Portal Meeting Notes

Date: [July 27, 2021]	Notes Location: [Filename or file path]
Time: [10:00 am – 12:00 pm]	Meeting Materials: [Document Name or file path]
Meeting Called by:	[Document Name or file path]
Attendees: [Name], [Name], [Name]	

Topic

UAT Testing

- Discussed BenefitsCal UAT efforts and results

Important Points

- BenefitsCal UAT efforts for the past six weeks have focused on component testing and will shift to full end-to-end testing starting the week of 07/25/2021.
- There are 113 unique testers that have participated in the BenefitsCal UAT efforts. It's anticipated that another 70-74 additional testers will participate in the remaining weeks.
- A total of 284 out of 700 test cases were completed with a 68% pass rate and 160 defects identified.
- Test cases include testing for:
 - Languages such as Spanish and Vietnamese.
 - Mobile devices and tablets.
 - All browsers.
 - All programs.
- The target is to complete between 100-150 test cases per week for the next three weeks.

BenefitsCal Integration Team

- Validation Message for DV Flag – Confidential Cases

- SCR CA-49 was discussed. The SCR adds a page validation to prevent users from opting-in a participant for 'E-Notifications', 'Allow E-Mail Reminder', and 'Allow Text' if they are linked to any case with an active 'Domestic Violence' case flag and/or an existing 'Domestic Violence' confidentiality record and their household status for the case is 'In the Home'. The 'Domestic Violence' case flag is considered active when it is without an end date as of the current date. The 'Domestic Violence' confidentiality is considered when it has not been removed. The following validation messages will display if the user tries to save while the above condition exist:
 - a. "E-Notification – Cannot opt-in participant for electronic communications due to a 'Domestic Violence' case flag and/or confidentiality."
 - b. "Allow E-Mail Reminder – Cannot opt-in participants for electronic communications due to a 'Domestic Violence' case flag and/or confidentiality."
 - c. "Allow Text – Cannot opt-in participants for electronic communications due to a 'Domestic Violence' case flag and/or confidentiality."

- Validation Message for DV Flag – Confidential Cases (Cont.)

- There is a new CalSAWS Customer Privacy Page that allows users to limit electronic communications and lock case information access in the BenefitsCal account.
- Only County staff would be able to lock the case information on a BenefitsCal account through the CalSAWS Customer Privacy Page.
- Customers will not be able to opt-in/opt-out on-line to have the case information locked through the BenefitsCal accounts.
- Some committee members recommended to allow participants to opt-in/opt-out through the BenefitsCal accounts. Other members voiced security concerns by advocates in allowing customers to opt-in/opt-out to the case information online.
- Committee members asked the organizer to share State policy governing access to confidential case information and how it aligns with the proposal for locking case information from the BenefitsCal accounts.
- By default, customers will be opted-in to access case information through the BenefitsCal accounts for all cases, including all Domestic Violence cases, with one exception. There will be a one-time data clean-up effort to default all of Los Angeles County's existing Domestic Violence cases to opt-out of having access to case information through the BenefitsCal accounts.
- The committee decided to delay a vote on the BenefitsCal case information opt-in/opt-out options until clarification is provided on State guidelines for confidential case security and access.
- The organizer committed to provide the additional information being requested by the committee and request a vote via email.

Deloitte Demos

- Report a Change
 - Deloitte provided an end-to-end demo of the Report a Change functionality. In the example use, a customer was reporting a newborn.
 - The system does not prompt the users to upload necessary documents associated to the changes being reported. This functionality will be added as a future enhancement.
 - Although users are not prompted to upload documents, they can upload documents through the "Submit Needed Documents" section.
 - The system does not capture the SS# when a new baby is reported. This may be added as a future enhancement.
 - When customers report changes, a new task with the following specifications will be generated in CalSAWS:
 - Category: Self Portal Communications; and
 - Type: Customer Reporting a Change.
- Report a Change (Cont.)

The task will be assigned according to existing program hierarchy: Cash programs, CalFresh, Medi-Cal, and Welfare-to-Work.

- There is a concern that customers will not be able to report Welfare-to-Work changes in BenefitsCal because the associated tasks generated in CalSAWS will be assigned to the cash program workers based on the program hierarchy.
- Region 6 recommended to add an "Images" button in the new task where uploaded documents associated to the reported changes can be easily accessible.
- There was a concern with multiple tasks being generated when a change was reported through BenefitsCal and supporting documentation was uploaded. In that instance, a Point of Service task will be generated for the uploaded documents and a Customer Reporting a Change task will also be generated.
- It was stated that only cases where the user is a payee or head of household will appear on the dashboard.
- Income Reporting Threshold is currently not displayed in BenefitsCal and it's being consider as a future enhancement.

- Customer Dashboard – Application Status

- The Application Status section in the Customer Dashboard was discussed.
- The section will display track applications when they are submitted, received, and process according to the following e-Application status.

BenefitsCal Application Status	CalSAWS e-Application Status
Sent	Pending Clearance
Received	Data Transfer
Processed	Not Accepted or Transferred to System

- Customer Dashboard - EBT

- The EBT functionality was discussed.
- Customers cannot request EBT card replacements. This will be a future enhancement targeted for 11/2022.
- The system displays purchases and the EBT account balance. However, the system does not provide deposit details.

- Message Center

- The Message Center functionality was briefly discussed and there was a commitment to provide a full demo in a future meeting.

#	Action Item	Assigned To	Assigned Date	Due Date	Status
1	Provide State guidelines associated to confidential case security and access.	Committee Organizer	07/27/21	TBD	Pending
2	Provide full demo on Messaging Center in future meeting.	Deloitte	07/27/21	TBD	Pending

#	Decision Made	Who Made the Decision	Date
1	N/A		
2			

DRAFT

