

☒ CalSAWS DD&I☐ C-IV M&O☒ CalWIN M&O☐ LRS M&E

Distribution Date:	September 30, 2021
To:	PPOC.All, Consortium.RegionalManagers.All
CIT Name:	VITA Appointment Request/Tasks from BenefitsCal
From:	CalSAWS Project

PPOCs, please forward to the appropriate impacted staff in your county:

- | | |
|--|---|
| <input type="checkbox"/> General
<input type="checkbox"/> Policy
<input type="checkbox"/> CW
<input type="checkbox"/> CF
<input type="checkbox"/> MC
<input type="checkbox"/> CMSP
<input type="checkbox"/> FC/KG/AAP
<input type="checkbox"/> Child Care
<input type="checkbox"/> WtW
<input type="checkbox"/> Other Program(s) _____
<input checked="" type="checkbox"/> BenefitsCal <input type="checkbox"/> Your Benefits Now!
<input type="checkbox"/> Customer Correspondence
<input type="checkbox"/> Other _____ | <input type="checkbox"/> Reports
<input type="checkbox"/> Fiscal
<input type="checkbox"/> Caseload Movement
<input type="checkbox"/> Management
<input type="checkbox"/> Fiscal
<input type="checkbox"/> Security
<input type="checkbox"/> Batch and Interfaces
<input type="checkbox"/> Imaging
<input type="checkbox"/> Migration
<input type="checkbox"/> Conversion
<input type="checkbox"/> Technical
<input type="checkbox"/> Training
<input type="checkbox"/> Help Desk |
|--|---|

Description: (Including any step-by-step instructions)	<p>Purpose The purpose of this CIT is to communicate information about the new Volunteer Income Tax (VITA) Appointment task added to CalSAWS for BenefitsCal changes.</p> <p>Background With the implementation of BenefitsCal, Customers will have the ability to request the scheduling of a VITA Appointment. VITA can only be requested during the tax season, January 31st to April 15th. A new task was created to communicate this request, to the Counties.</p> <p>Additional Information CalSAWS was updated to include the new VITA Appointment task to allow Counties the time to set up a person or bank to accept the task, prior to the start of the tax season and BenefitsCal implementing the 'Schedule a VITA Appointment' functionality, in November.</p> <p>When the request is received from BenefitsCal, the System will first search for a worker that is set up to receive the VITA Appointment Task. If there is no worker found, then the System will search for a Bank that is associated to the VITA Appointment task. If no Bank is found, then the System will return an exception to BenefitsCal that the task could not be generated. BenefitsCal will message the Customer appropriately.</p>
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	<p>Task Information: <i>Task Type:</i> Customer VITA Appointment Requested Through Self-Service Portal <i>Task Description:</i> Customer has requested a VITA appointment with the following information: {param from BenefitsCal} <i>Task Due Date:</i> 5 Days <i>Task Available for Automation:</i> No</p> <p>County Action If the county offers VITA appointments to Customers, then the county will need to set up the task, in CalSAWS, for a Worker or Bank. This selection is based on your county process.</p> <p>Note: If the county does NOT offer VITA Appointments, then the county does not need to set up the task, in CalSAWS.</p> <p>If you have any questions, please email the Primary Contact and cc your Regional Manager(s).</p>
Primary Project Contact: (Name, phone number, email address)	Dymas Pena PenaD@CalSAWS.org
Backup Project Contact: (Name, phone number, email address)	Laura Ould OuldL@CalSAWS.org
Attachments:	None
Web Portal Link:	<div style="background-color: black; width: 80px; height: 20px; margin-bottom: 10px;"></div> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> 1. Click on the CRFIs & CITs link at the top of the page. 2. Click on the "CalSAWS Information Transmittal (CIT)" folder. 3. Click on the "2021" folder. 4. Click on the appropriate CIT # folder.