

## **Self-Service Portal Committee Meeting Notes – April 5, 2022**

### **CA – 239571 - BenefitsCal – Two Way Messaging**

Currently workers can send the customer a message via the BenefitsCal portal through the e-Messages pages. The customer is unable to send a message back to the worker through the portal. They are also unable to initiate a message to their worker.

#### **New Functions**

CA-239571 – BenefitsCal Two Way Messaging adds two (2) core functions:

1. customers can respond to the following worker-initiated Actions:
  - a. upload a document
  - b. view a document, or
  - c. respond to a question.
2. customers will be able to send a message to their worker.

#### **Opting In or Opting Out**

Counties will have the option to opt-in/opt-out of the Two-Way Messaging functionality. The opt-in/opt-out functionality applies to both CalSAWS and BenefitsCal.

If a county opts out - the worker can still message the customer, but the customer cannot reply.

If a county opts in – the worker can create an Action for the customer and receive a reply from customer.

#### **Worker Initiated Actions**

- Customers can only send documents that are accepted by BenefitsCal.
- When the customer sends the Action it will go to “Pending Review”.
- Once the worker reviews the Action it displays as “Action Closed”.
- If the customer receives an action from a caseworker that was already completed, the customer can close the action by selecting that they already completed the action.

#### **Message from Customer**

Users in BenefitsCal have access to their Message Center. To send a message, customers must enter the Case Number, Program, and predefined question they need support with. The predefined questions are specific to the program the customer chooses. Customers can view the predefined question in their own language. BenefitsCal will send the message in English. The customer can type their own message if they select “Other”.

The list of programs the customer can choose from is not dynamic to the case number. The customer is not restricted to select programs that they are active in. Some

questions will display for multiple programs. The CAPI and GROW programs were added for the customers to select. GROW will only display if the user is in LA County.

When a customer submits a message, they will receive a message notifying them when they can expect a reply. CalSAWs will receive the customer's message and the worker can respond to the message. Customers can view messages sent in the Message Center. Once the customer receives a response they cannot reply to the response. They will have to submit another message if they have additional questions.

The message function is best utilized for case specific questions. A link is available for customers to look at FAQs or Help Videos in the Help Center.

Usability will be tested with customers.

### CalSAWS

A yellow banner displays on the case summary page when a message is available for a case. Workers must navigate to e-message page to view the message. e-messages will not be tasked or journaled.

Counties that opt-in will be able to view the new My e-Messages section on the CalSAWS Homepage. It includes the following subsections:

- Received
- Read
- Action Response Overdue
- Action Completed - Needs Review

Only the worker has the rights to view this section. This section will not display if the county opts out.

### Q & A

Q: If the caseworker doesn't respond within 5 business days is there an escalation?

A: There isn't a way for the customer to escalate within BenefitsCal. Escalation is not built into the design. If this is wanted, they would like to hear from the RCMs.

Q: If the action does not ask to upload document, will the option to upload not be available?

A: Based on the action type set by the case worker BenefitsCal will display the correct Action Flow.

Q: Is there a maximum character limit?

A: Yes, 4000 characters.

Q: Is there a maximum number of messages a customer can send per day?

A: No, the design group did not agree to a limit. The state does not want to limit how many messages can be sent.

Q: Does a customer need to opt in to receive messages?

A: No, if the customer has a BenefitsCal account they do not have to opt in to receiving messages.

Q: Is there a daily report on e- messages.

A: Reporting was not added as part of this Design. Need to submit an enhancement request.

Q: If the client selects a program they don't have, how does the system determine which worker gets the message?

A: We are working with CalSAWS team to understand and align the hierarchy of which worker the tasks should be routed to in case a program selected is not one that has a case worker associated to.

Q: Does the yellow banner expire at the end of the day like a Call Log or does it last until cleared?

A: No expiration date currently. Will look at a future enhancement if needed. It stays until the status have been updated and there are no more actions.

Q: Do we have the list of documents allowed included in the design document or are they included in a different SCR?

A: They can send a list.

Q: So customers will automatically get messages if the county opts in for 2-way messaging.

A: Yes, if the worker/customer initiates the message.

Q: What are all the options for the search by option? And for the user initiated will go to the worker who initiated?

A: The search criteria is the same on every page.

Q: Can we add an export capability to the search result?

A: The County needs to submit a CER enhancement request.

Q: Will the message to the CalSAWS case set a task in the case or show up on a report so the worker will know there is a message?

A: A task is not created when an e-message is received.

Q: Would an uploaded document initiate a task, assuming we have document routing rules configured? This particular action is a bit different from the other messages.

A: The receipt of any document into the Hyland imaging system will follow Document Routing Rules - the BenefitsCal User taking the action will update the e-message itself. This is set up by county if they want to receive a task.

Q: The e-message goes to the case assigned worker - how does this work for banked caseloads?

A: The system looks for the worker ID. If the cases are linked to a banked caseload then this is the worker ID where the message is going. The system only allows one staff member to be assigned to the worker ID. Who is going to receive/review these messages? A worker ID is assigned to a case. The county will look for the case or search for messages by that workload. If this is based on task vs. message center, we can recommend for review based on this design. But it is up to the regions to determine how that will work.

### **BenefitsCal – Assets**

During the advocate review it was noted that some of the asset/resources questions on the SAWS 2 Plus are not on the CF 285. The advocates requested that we modify the logic so the customer only has to complete those asset/resource questions that are applicable to CalFresh (CF) and not all the ones currently listed.

With the limited time before going live, the resolution approved by CDSS was to keep the assets section locked down for CF only applications.

With the assets section being locked down for customer this means:

- CF applications received may have been incomplete, because assets/resources were skipped.
- Each case may have appeared to be otherwise eligible and received Expedited Services (ES), but in fact they had assets over the limit.

An SCR was logged (CSPM-35841) however the draft is too broad and CalSAWS would like to refine the SCR to make it more specific to get the hours down.

CalSAWS is working on the issue. In the meantime:

- Please make sure your county is aware of this issue
- Customers aren't ignoring these questions. They have been blocked from answering them.
- Counties should reach out to CDSS and see what process they should follow for issuing ES or if they could issue guidance so all counties know what process should be followed.

### **BenefitsCal Release 4.0 and Release 4.1.5**

Previously release 4.0 contained the following items:

- Two-way messaging
- Community Based Organization (CBO) Access

- CalWORKs 2.0
- Support Requests
- Able-Bodied Adults Without Dependents (ABAWD) Time Clocks
- Voice/Speech Recognition, and
- GA/GR/GROW Updates.

There were a few design sessions for some of these items.

The American Rescue Plan Act (ARPA) gave money to use to help bring the economy jobs and help the underserved and have it completed by September of 2022.

Therefore, some of the things on the release list will be pushed back and we will focus on CBO Enhancements and Student Applications.

#### CBO Enhancements

This feature will allow CBOs to track the number of applications submitted as a result of their marketing efforts and includes a report for CDSS to review these numbers as they look to reimburse CBOs and other vendors for their outreach efforts. Essential to track federal reporting for outreach activities as well. Referral codes are currently used for GetCalFresh and CDSS to determine payment for CBOs who conduct marketing and outreach efforts.

#### Student Applications

The following is planned to meet their specific requirements and needs, and to improve the customer experience for applications: college students (phase 1). Supplemental Security Income (SSI) recipients, and immigrants (phase 2).