

CalSAWS M&E

CalWIN Migration

<b>Distribution Date:</b>	November 28, 2022
<b>To:</b>	PPOC.42,PPOC.SantaClara,PPOC.Tulare, PPOC.ContraCosta,Consortium.RegionalManagers.All; Committee.SelfServicePortal.All
<b>CIT Name:</b>	<b>BenefitsCal CalSAWS Features Status for Counties</b>
<b>From:</b>	CalSAWS Project

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

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

	<p><b>Purpose</b> The purpose of this CIT is to provide the CalSAWS counties with a list of configurable features available in BenefitsCal (BC) and the current status for each county.</p> <p><b>Background</b> CalWIN wave 1 and 2 counties were asked to review their options with CRFI 22-042 and CRFI 22-099. CalWIN waves 3-6 will have a CRFI created for each wave to document each county's decision.</p> <p>Two-Way Messaging was sent for all CalSAWS and CalWIN counties through CRFI 22-035 BenefitsCal Two-Way Messaging Counties Opt-In. All counties' selections have been included in the list of configurable features.</p>
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### **Additional Information**

BenefitsCal includes features that can be enabled or disabled by county.

**Please note that a CER is required to change your existing selection.**

A brief description of each feature:

**1. Interview Nudge:**

Opt-in – Allows counties to set up interview call center hours, days, and interview nudge. The interview nudge will display on the application receipt for customers at the end of an application, informing them they can call the county for an application interview.

Opt-out – The interview nudge will not be visible to customers.

**2. GA/GR Applications:**

Opt-in – Allows customers to apply for the GA/GR program through BenefitsCal.

Opt-out – Customers will continue to apply for the GA/GR program through current county processes.

**3. EBT/BIC Card Replacement:**

Opt-in – Allows customers with a linked BenefitsCal account to request a replacement EBT/BIC card online. When requested, a task is generated in real time for county processing within CalSAWS.

Opt-out – Customers will not see this selection on their BC dashboard and will continue to request through the existing county process.

**4. Volunteer Income Tax Assistance (VITA) Requests:**

Opt-in – Allows customers with a linked BenefitsCal account to submit VITA appointment requests. This request will generate a task within CalSAWS for county processing.

Opt-out – Customers will not see this as a selection within their BC dashboard.

**5. Two Way Messaging:**

Opt-in – Allows customers with a linked BenefitsCal account to message a Worker and allows Workers to reply to customer messages, upload/view a document or request information from the customer.

Opt-out – Current one-way informational message functionality to the customer remains. The one-way message will be stored in CalSAWS and cannot be edited.

6. **Click to Chat with a County representative (Only applicable to counties with Call Centers):**

Opt-in - Allows customers to chat with a county representative through a chat window online.

Benefits of this communication type are:

- Fast and efficient
- Avoids IVR system/phone trees
- No verbal communication barriers

For a customer to initiate this request they can select "Chat with a County Representative" on the Help page in BenefitsCal.

### **Chat with a county representative**

**To get started, please enter your details below.**

Select Your County

Once the customer selects the county they live in, they will be connected to an agent.

If the customer selects a county that does not have a call center, the following message will display:

### **Chat with a county representative**

**To get started, please enter your details below.**

Select Your County

**We're sorry. This county doesn't have live chat.  
Please contact your local office.**

[FIND MY LOCAL OFFICE](#)

7. **Call Me (Only applicable to counties with Call Centers):**

Opt-in – Allows customers to select their county and leave their information so a county representative can call the customer back.

Benefits of this communication type are:

- Fast and easy
- Avoids IVR system/phone trees

For a customer to initiate this request they can select “Call Me” on the Help page in BenefitsCal.

### **Call Me.**

**To get started, please enter your details below.**

Select Your County

### **Call Me.**

**To get started, please enter your details below.**

Select Your County

**Great! Select the button below to leave your information and a county representative will reach out.**

When the customer selects the county they live in, it will go to the call center’s queue. The next available agent can pick up the call. If they select a county that does not have a call center, the following message will show:

### **Call Me.**

**To get started, please enter your details below.**

Select Your County

**Apologies, this county does not yet support this service. Please contact your local office.**

	<p><b>County Action</b></p> <ol style="list-style-type: none"> <li>1. Each county needs to review their current selections on the Web Portal.</li> <li>2. Counties may choose to update their current selections as business needs change by submitting a CalSAWS Enhancement Request (CER). A notification will be sent to the county PPOC indicating receipt of the request. The CER will be reviewed and SCR created for the change.</li> </ol> <p><b>Note:</b> No action is necessary for the county unless a county chooses to update their current feature selections.</p> <p>The current designations will be maintained on the Web Portal for counties' reference.</p> <p>The feature listing is stored on the Web Portal in the following location:</p> <p>[REDACTED]</p> <p>If you have questions on this CIT, please reach out to the Primary Contact and cc your Regional Managers.</p>
Primary Project Contact:	Marsale Eramya <a href="mailto:EramyaM@calsaws.org">EramyaM@calsaws.org</a>
Backup Project Contact:	Carrie White <a href="mailto:WhiteC@calsaws.org">WhiteC@calsaws.org</a>
Attachments:	None
Web Portal Link:	<p>[REDACTED]</p> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> <li>1. Click on the CRFIs &amp; CITs link at the top of the page.</li> <li>2. Click on the "CalSAWS Information Transmittal (CIT)" folder.</li> <li>3. Click on the "2022" folder.</li> <li>4. Click on the appropriate CIT # folder.</li> </ol>

