☒ **CalSAWS M&E**   ☐ **CalWIN Migration**

Distribution Date:	March 21, 2023
To:	PPOC.all, Consortium.RegionalManagers.All, Committee.SelfServicePortal.All, Committee.Training.All
CIT Name:	**CA-255586-DRAFT Job Aid for Community-Based Organization ROI for BenefitsCal**
From:	CalSAWS Project

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

☐ General

☐ Policy

    ☐ CW

    ☐ CF

    ☐ MC

    ☐ CMSP

    ☐ FC/KG/AAP

    ☐ Child Care

    ☐ WtW

    ☐ Other Program(s)_____

☐ BenefitsCal   ☐ MyBCW

☐ Customer Correspondence

☐ Other_____

☐ Reports

    ☐ Fiscal

    ☐ Caseload Movement

    ☐ Management

☐ Fiscal

☐ Security

☐ Batch and Interfaces

☐ Imaging

☐ Migration

☐ Conversion

☐ Technical

☒ Training

☐ Help Desk

Description:	**Purpose** The purpose of this CIT is to provide CalSAWS counties with the DRAFT Self-Service Portal (SSP) - Community Based Organization (CBO) Release of Information (ROI) Job Aid, which covers new functionality being added in CalSAWS with Release 23.05. **Background** Over the last year, DHCS and CDSS has worked on policy, as well as a release of information for customers to use when being assisted by CBO's. The ABCDM 229 is a form submitted by the customer that allows CalSAWS to send specific case information to a CBO or specified Assister, via the Self-Service Portal, for a specific County. The ACL change is currently in process and the final ACL is estimated to be released to the Counties in April or May 2023. Customers will have the ability to electronically complete the ABCDM 229 from their BenefitsCal account. They may also provide the completed paper form via mail, by handing the form in at the office, or by uploading a form on the BenefitsCal dashboard. For paper forms, the counties will enter the information directly into new CalSAWS pages created for this change.

	Additional Information When a CBO ROI record is established, in CalSAWS, then Customer specified case data will be sent to the CBOs dashboard in BenefitsCal for viewing. The Functionality for this form and policy will be implemented with SCRs CA-247709-Design of Release of Information for Community-Based Organizations (CBOs) and CA-239907-BenefitsCal Release of Information CBO Access. **County Action** The Counties are encouraged to share the attached Job Aid with county training staff to begin creating training materials for their county. If you have questions on this CIT, please reach out to the Primary Contact and cc your Regional Managers.
Primary Project Contact:	Dymas Pena CalSAWS | Business Analyst Policy & Design Team PenaD@CalSAWS.org
Backup Project Contact:	Laura Ould CalSAWS | Business Analyst Policy & Design Team OuldL@CalSAWS.org
Attachments:	DRAFT_JA_Self-Service Portal (SSP) – Community-Based Organization (CBO) Release of Information (ROI).docx
Web Portal Link:	▮▮▮▮▮ OR You may also retrieve the CIT document and attachments by following these steps: 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 "2023" folder. 4. Click on the appropriate CIT # folder.

CalSAWS | Information Transmittal   Page 2