Self-Service Portal (SSP) - Community Based Organization (CBO) Release of Information (ROI)

Purpose

The purpose of this job aid is to provide instructions for adding a Community Based Organization (CBO) Release of Information (ROI) record in the System to allow specified case data to be sent to a CBO or Assister through the Self-Service Portal (SSP).

CBO Release of Information

The Release of Information pages in CalSAWS accommodates the ABCDM 229 – Applicant/Recipient's Authorization For Release Of Information To Community Based Organization (CBO) In BenefitsCal form (CBO ROI). The CBO ROI is a form submitted by the customer that allows the System to send specific case information to a CBO or specified Assister, via their Self-Service Portal account, for a specific County. The System sends specified case details for all applicable cases within the county for the Primary Applicant. CBO ROIs are valid for a specified period of time, designated by the Customer, up to 365 days. The effective date and end date of the CBO ROI displays on the "Release of Information Detail" page.

Note: Minor Consent case detail information will not be sent to the CBO Self-Service Portal Dashboard.

Submitting the ABCDM 229 Form

A Customer may submit a CBO ROI either through their Self-Service Portal Dashboard by entering the data online, uploading an ABCDM 229 form via the Self-Service Portal, mailing the form to the county, or submitting the form in person in a county office.

The ABCDM 229 form must be completed and signed by the Primary Applicant for the CalWORKs (CW), CalFresh (CF) or Medi-Cal (MC) programs or (for paper form) their Authorized Representative.

Note: The Release of Information pages in CalSAWS only accommodate the ABCDM 229 form and are not intended for any other Releases of Information submitted by the customer.

Release of Information Pages

The Release of Information pages were created for the user to enter the information when the ABCDM 229 is received and to capture the CBO ROI information sent from the Self-Service Portal. This information will establish a Customer’s preferences for sending case data to the identified CBO or Assister. This information is released via the Application Programing Interface (API) to the SSP only.

The System will automatically Approve or Revoke a CBO ROI sent from the SSP if the Customer Name and DOB match what is currently in the System. As no worker intervention is needed, the System will automatically create a Journal entry for the case(s) impacted.

Customers may have multiple CBO ROIs for different CBOs but only one Pending or Active record per CBO, for a specified period. If a CBO ROI exists in Pending or Approved status and the Customer submits a new CBO ROI paper form, for the same Organization, then the existing CBO ROI must be revoked prior to adding the new CBO ROI record. Submission of the new CBO ROI is the Customer’s approval/request to revoke the existing CBO ROI for that organization.

Note: If a new CBO ROI is sent via the SSP for the same CBO, then the System will automatically revoke the existing ROI record and insert the new one.

Pending Status

A CBO ROI sent from the Customer via their SSP Dashboard may generate with a Pending status. This occurs when the Customer’s Name and DOB information provided in the Self-Service Portal does not match what is in the System. (Example: Maria Smith 11/11/1976 vs. Marria Smith 11/11/1976)

Workers will need to review the information on the ROI form and determine if the CBO ROI should be Approved or Revoked. Workers should follow their county’s business process for contacting the customer to complete this process and document the conversation to capture the information.

Revoking a CBO Release of Information

Only a customer may revoke a CBO ROI either through their SSP dashboard or by contacting the county. CBOs do not have the ability to revoke an ROI from their SSP. The CBO may notify the county or Customer if they have reason to believe an ROI should be revoked. If the CBO contacts the county, then the county must contact the Customer prior to taking any action. Once Revoked, the customer's case data will no longer be viewable by the CBO.

Auto Journal

The System will create an automatic Journal entry when a CBO ROI is received via the API and is in a Pending, Approved, or Revoked status. A Journal entry will be created when the Batch Process updates the CBO ROI status to "Expired".

Imaging

When the Customer completes the CBO ROI online, the information is sent to the System via API. The API creates the ABCDM 229 form, based on the information received, and uploads the document to the Imaging solution. Workers can view the form by clicking the Images button in the System.

When a customer submits a ABCDM 229 with their e-Application and does not have an existing case in CalSAWS, the form will be uploaded to the imaging system for manual entry. The ABCDM 229 is located in the External Staging Drawer in this instance.

Task Generation

A Task is automatically created when a form is uploaded to the imaging solution. The task generated will be based on the Document Routing Rules established by the county.

Case Summary

Active CBO ROIs are viewable on the Case Summary page in the 'CBO Release of Information to Self-Service Portal' sub-section of the 'Self-Service Portal' section, if the applicant/recipient is the Primary Applicant on the CalWORKs, CalFresh, or Medi-Cal program. The Primary Applicant Name and CBO Name displays for the user. The Primary Applicant name is the name of the Applicant/Recipient on the CBO ROI. The Primary Applicant Name link navigates the user to the Release of Information Detail page for viewing.

Expiration of a CBO Release of Information

The System calculates the end date of a CBO ROI based on the Signature Date and the length of the CBO ROI, as identified by the Customer. This date displays on the "Release of Information Detail" page.

On the date of expiration, a Batch process runs, updates the status of the CBO ROI to "Expired", and generates a Journal entry. Case data will no longer be viewable by the CBO.

ICTs and County CBO ROIs

When an Inter-County Transfer (ICT) occurs, the existing ROI will remain in Active status until the customer either revokes the ROI or the ROI expires in the sending county. A CBO ROI is not transferrable to another county. The customer would need to create a new CBO ROI for the new county.

Selecting CBO Managers and Assisters

The customer must identify a single CBO for their CBO ROI. Once a CBO is selected from the Select Community Based Organization page the CBO and associated Managers within that CBO will display on the Release of Information Detail page. Customers have an additional option of selecting specific Managers and/or Assisters who will have access to their specified case data for the Medi-Cal Program only. If a customer has chosen specific CBO Manager(s) or Assister(s) they must be selected from the Select CBO Managers & Assisters for Medi-Cal page.

CBO Release of Information Submitted from Self-Service Portal

When a CBO ROI is submitted by the customer from the SSP, the information will auto-populate on the Release of Information Detail page. If the CBO ROI is automatically approved, then the System will create a Journal for the worker. The API will generate an ABCDM 229 form and upload the form to the Imaging Solution.

The System will insert a Journal entry based on the CBO ROI Status and a task will generate based on the county's document routing rules.

Navigate to the Release of Information Pages

Access to the Release of Information pages is through the e-Tools Local navigator. These pages will allow you to search for existing CBO ROI records, view or edit an existing record, or add a new record.

To begin, the user must search for the Primary Applicant for the specified program(s) on the ABCDM 229 form.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Select **Release of Information** from the **Task** navigator.
4.	On the **Select Person** page: a) Enter the Person information.

Step	Action
	b) Click the **Search** button.
5.	On the **Select Person** page: a) Select the **Primary Applicant** on the Case for the program(s) specified. b) Click the **Select** button.

Note: If each program has a different Primary Applicant, then a separate ABCDM 229 is needed for each program selected.

Approving/Revoking a CBO Release of Information Record Submitted Through the Self-Service Portal

Customers may submit a CBO ROI directly through their SSP account. CBO ROI submissions will be approved automatically if there is a match for the Name and DOB.

If the Name and DOB information does not match the data in the System, then the user must manually complete the process. Once the customer information is verified by the county the user approves or revokes the CBO Release of Information pages in the System by updating the Status.

Note: Information sent to the System via the SSP will not be editable, except for the Status.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Click **Release of Information** on the **Task** navigation bar.
4.	On the **Select Person** page: a) Enter the appropriate search information. b) Click the **Search** button.
5.	On the **Select Person** page: a) Click the radio button for person being updated. b) Click the **Select** button.
6.	On the **Release of Information Search** page: a) Confirm the customer’s information is correct. b) Click the **Search** button.
7.	On the **Release of Information Search** page: a) Click the radio button for the ROI record being updated. b) Click the **Edit** button.
8.	On the **Release of Information Detail** page: a) Review customer information.

Step	Action
	b) Select the appropriate status from the **Status** drop list. a) Click the **Save** button.

Add a CBO Release of Information Record

Customers submitting an ABCDM 229 form directly to the county must have a CBO Release of Information record added in CalSAWS. The user will enter all information provided on the form.

Steps for adding an ROI record in CalSAWS:

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Click **Release of Information** on the **Task** navigator bar.
4.	On the **Select Person** page: a) Enter the appropriate search information. b) Click the **Search** button.
5.	On the **Select Person** page: a) Select the **Primary Applicant** on the Case for the program(s) specified. b) Click the **Select** button.
6.	On the **Release of Information Search** page: a) Confirm the customer's information is correct. b) Click the **Add** button.
7.	On the **Release of Information Detail** page in the **Contact Information** page section: a) Enter the Address provided. If the customer does not have a mailing address, check the **Does not have a mailing address** checkbox. b) Enter the Phone Number provided. If the customer does not have a phone number, check the **Does not have a phone number** checkbox.
8.	On the **Release of Information Detail** page in the **Programs for Release** page section: a) Select the checkbox(es) for the Programs selected by the customer.
9.	On the **Release of Information Detail** page in the **Community Based Organization Information** page section: a) Click the **Select** button.
10.	On the **Select Community Based Organization** page:

Step	Action
	a) Enter the **Organization Name** in the **Organization Name** text field. b) Click the **Search** button. c) In the Search Results Summary section click the radio button for the **Organization Name** d) Click the **Select** button.
11.	If a Medi-Cal program is selected and the customer named specific Mangers or Assisters for the Community Based Organization, follow these steps on the **Release of Information Detail** page in the **Community Based Organization Information** page section. If not, skip to step 13: a) Select **Yes** from the **Medi-Cal CBO Managers/Assisters** drop list. b) Click the **Select** button.
12.	On the **Select CBO Managers & Assisters for Medi-Cal** page: a) Check each checkbox for the Mangers or Assisters named by the customer. b) Click the **Select** button.
13.	On the **Release of Information Detail** page: a) If the programs selected include Medi-Cal, select the reasons for sharing in the **Medi-Cal Reason for Sharing Information** page section. If not, skip to row 12. **Note:** If selecting "Other", enter the Reason in the text field.
14.	On the **Release of Information Detail** page: a) Select the information to be released in the **Programs Information for Release** page section. b) Select the appropriate **Length of Access** in the **Length of Information Access with CBO** page section. c) Select if case history is appropriate in the **Length of Case History** section. d) Enter the **<First Name>** in the **First Name** field. e) Enter the **<Last Name>** in the **Last Name** field. f) Enter the **<Date the Form was Signed>** in the **Signature Date** field. g) Click the **Save** button.
15.	On the **Release of Information Detail** page in the **Signature Information** page section, if an Applicant/Recipient signed the ABCDM 229: a) Select the Signature of Applicant/Recipient radio button. b) Enter the **<First Name>** in the **First Name** field. c) Enter the **<Last Name>** in the **Last Name** field. d) Enter the **<Date the Form was Signed>** in the **Signature Date** field.

Step	Action
	Note: If the form was signed by a Parent or Guardian for the CalWORKs or Medi-Cal program, skip to step 16. e) For CalWORKs or Medi-Cal programs, if a Parent or Guardian has signed the ABCDM 229, enter the **<First Name>** in the **First Name** field. f) Enter the **<Last Name>** in the **Last Name** field. g) Enter the date the form was signed in the **Signature Date** field.
16.	On the **Release of Information Detail** page in the **Signature Information** page section, if a Guardian or Parent signed the ABCDM 229: a) Select the **Signature of Parent/Guardian** radio button. b) Enter the **<First Name>** in the **First Name** field. c) Enter the **<Last Name>** in the **Last Name** field. d) Enter the **<Date the Form was Signed>** in the **Signature Date** field. e) Click the **Save** button.

Edit a CBO Release of Information Record

If the user incorrectly enters information into the System, then the user must edit the record so that the information matches what was provided by the Customer on the ABCDM 229 form. Follow your county's business process for documenting any edits to the Release of Information Detail page.

Note: Information sent to the System via the SSP will not be editable, except for the Status.

These steps assume you have already created the Release of Information record you are editing.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Click **Release of Information** on the **Task** navigation bar.
4.	On the **Select Person** page: a) Enter the appropriate search information. b) Click the **Search** button.
5.	On the **Select Person** page: a) Select the radio button for person being updated.

Step	Action
	b) Click the **Select** button.
6.	On the **Release of Information Search** page: a) Confirm the customer's information is correct. b) Click the **Edit** button for the ROI being updated.
7.	On the **Release of Information Detail** page: a) Update the information, as needed. b) Click the **Save** button.

Revoke a CBO Release of Information Record

Customers may request that their CBO ROI be revoked at any time. The only time a CBO ROI record can be revoked is at the Customers request. Revoking the CBO ROI record will prevent any case data from being sent to the CBO Self-Service Portal dashboard.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **e-Tools** from the **Local** navigator.
3.	Click **Release of Information** on the **Task** navigation bar.
4.	On the **Select Person** page: a) Enter the appropriate search information. b) Click the **Search** button.
5.	On the **Select Person** page: a) Click the radio button for person being updated. b) Click the **Select** button.
6.	On the **Release of Information Search** page: a) Confirm the customer's information is correct. b) Click the **Edit** button for the ROI being updated.
7.	On the **Release of Information Detail** page: a) Select **Revoke** from the **Status** drop-list. b) Click the **Save** button.