CalSAWS

California Statewide Automated Welfare System

Design Document

CA-241871

Validate E-mail Addresses Added into Contact Detail

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Michael Wu, Naga Chinduluru, Himanshu Jain, Chitra Barsagade, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/11/2022	1.0	Initial	Andrea Rodriguez, Eric Perkins
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Table of Contents

1 OVERVIEW

This SCR will expand the logic on the Contact Detail pages to verify the entered E-mail addresses for Contacts who allow E-mail reminders.

1.1 Current Design

There is no validation in place in CalSAWS that validates participant E-mail addresses when 'Allow E-mail Reminder' is checked on the Contact Detail page. Only participants with BenefitsCal accounts who are opted-in to receive E-notifications have an E-mail validation process.

1.2 Requests

Update CalSAWS to create a process to validate a participant's E-mail address when the participant would like to receive E-mail from CalSAWS and is not opt-ed into E-Notifications through a BenefitsCal account.

1.3 Overview of Recommendations

1. Update the Contact Detail page to validate participant E-mail information when the 'Allow E-mail Reminder' option is checked.
2. Send a one-time validation e-mail to certain existing active participants that currently have the 'Allow E-mail Reminder' option checked, but do not have a Verified E-mail.

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically called out by this document.
2. Due to existing functionality, Contact Detail records on cases marked with a Domestic Violence Case Flag and/or Domestic Violence Confidentiality record are unable to receive E-mail reminders and the worker will receive a page validation when attempting to save the record when the 'Allow E-mail Reminder' box is checked.
3. E-mail Reminder verification process and functionality implemented with this SCR will apply a similar verification process to the existing Opt-In for E-Notifications E-mail verification process implemented in CA-234545 for the 'Allow E-mail Reminder' field.
4. The E-mail Reminder verification process implemented with this SCR will use a BenefitsCal website verification link to verify the E-mail for the participant that does not have a BenefitsCal account. This process does not create an account for the participant.
5. If the worker resends a verification e-mail, the link in the prior verification e-mail will no longer be valid and the customer will need to click the link in the latest verification e-mail to be able to successfully complete the verification.

2 RECOMMENDATIONS

2.1 Contact Detail

2.1.1 Overview

The Contact Detail page allows the worker to create, view, and edit a customer's contact information. This page allows the worker to allow E-mail reminders for a participant. This SCR will expand the logic on the Contact Detail page to have the participant verify the E-mail address entered for E-mail reminders.

2.1.2 Contact Detail Mockup

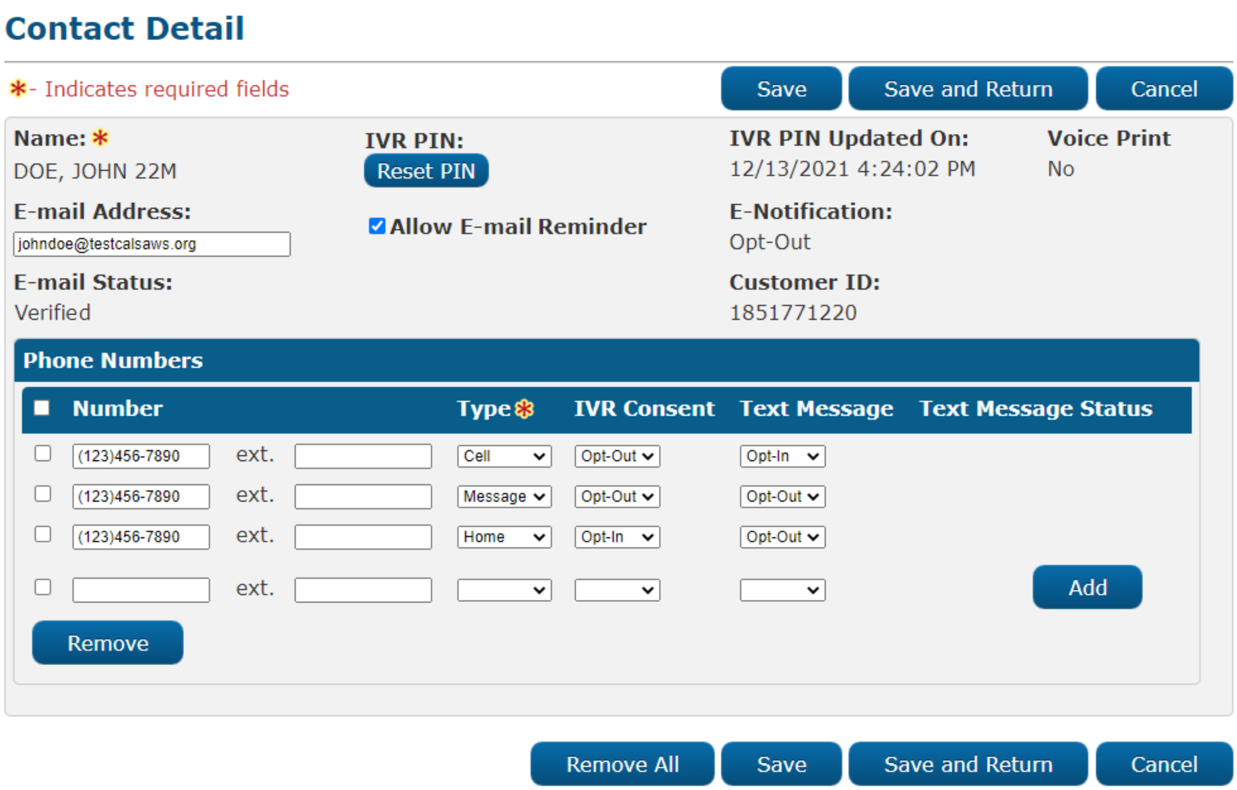
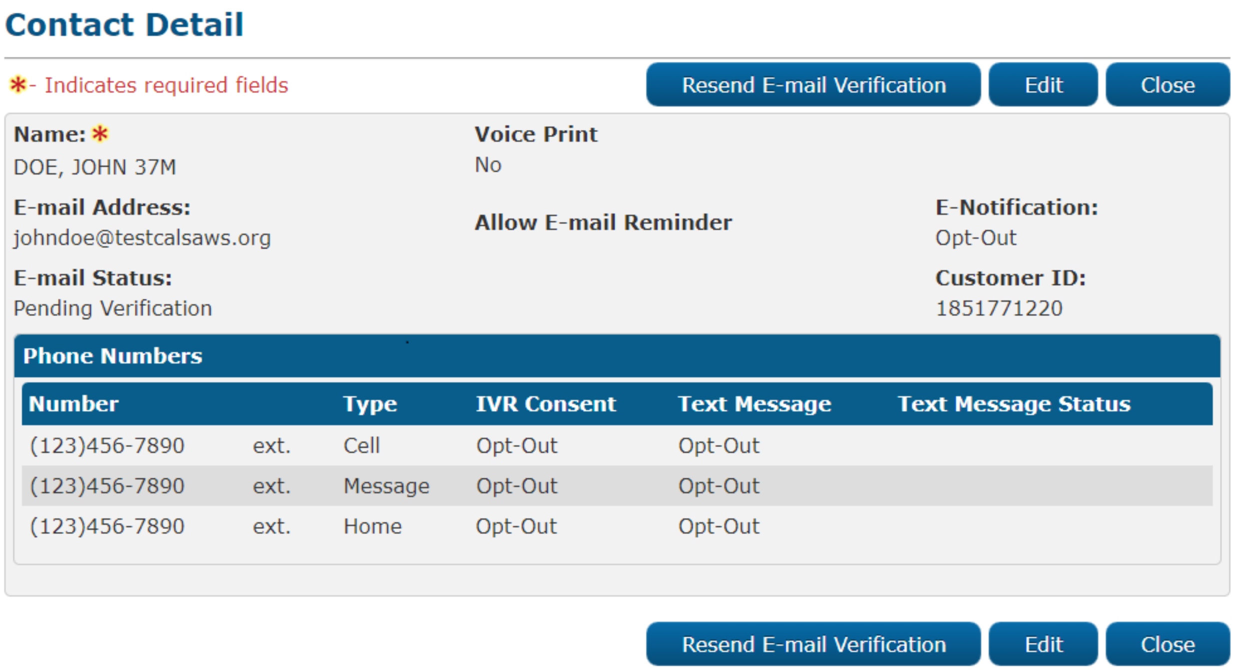


Figure 2.1.1 – Contact Detail page with Verified E-mail Address


Contact Detail

*- Indicates required fields

Resend E-mail Verification | Edit | Close

Name: *
DOE, JOHN 37M

Voice Print
No

E-mail Address:
johndoe@testcalsaws.org

Allow E-mail Reminder

E-Notification:
Opt-Out

E-mail Status:
Pending Verification

Customer ID:
1851771220

Phone Numbers

Number		Type	IVR Consent	Text Message	Text Message Status
(123)456-7890	ext.	Cell	Opt-Out	Opt-Out	
(123)456-7890	ext.	Message	Opt-Out	Opt-Out	
(123)456-7890	ext.	Home	Opt-Out	Opt-Out	

Resend E-mail Verification | Edit | Close

Figure 2.1.2 – Contact Detail page with E-mail Address Pending Verification

2.1.3 Description of Changes

1. Update the Contact Detail page logic to also verify the E-mail Address for E-Mail Reminders.
    a. Initiate a verification E-mail to the customer when all of the following conditions are met:
        i. ‘Allow E-mail Reminder’ is checked.
        ii. ‘E-Notification’ is not ‘Opt-In’.
        iii. The ‘E-mail status’ is not ‘Verified’.
        iv. The ‘E-mail Address’ field value is populated, and the value entered is a properly formatted E-mail address.
        v. The worker clicks the ‘Save’ button or the ‘Save and Return’ button in edit mode, or the worker clicks the ‘Resend Verification’ button in view mode.
        vi. The ‘E-mail Address’ field value has changed since the last time the record was saved when the ‘Save’ button or ‘Save and Return’ button is clicked.
    b. The verification E-mail will contain the following information:
        i. To: <E-mail Address On Contact Detail Page E-mail Field>
        ii. Subject
        English:
        CalSAWS E-mail Verification

        Spanish:
        Verificación del correo electrónico de CalSAWS

iii. Body
English:
Thanks for signing up for CalSAWS E-mail reminders. In order to receive E-mail reminders, we must verify your E-mail address.

Please click the following link to verify your E-mail address. The link will expire in 5 days.
<BenefitsCal Verification Link>

Spanish:
Gracias por registrarse para recordatorios por correo electrónico. Para recibir recordatorios por correo electrónico, debe verificar su dirección de correo electrónico.

Por favor, haga clic en el siguiente enlace para verificar su dirección de correo electrónico. El enlace caducará después de 5 días.
<Enlace de Verificación de BenefitsCal>

c. The default language for the E-mail is in English. When the participant's preferred written language is Spanish, the verification E-mail subject and body will be translated to Spanish, as shown above.
d. The Verification Link is a unique hyperlink tied to the customer that is used for opting-in to E-mail reminders.
    i. The verification link is only available for 5 days.
    ii. When the worker resends another verification email before the 5 days have passed, the link will no longer be active on the prior e-mail.
    iii. The URL will consist of the following: "https://benefitscal.com/verify-email/" followed by a unique code.
e. When the verification E-mail is sent successfully, set the E-mail Status to 'Pending Verification'.
f. When the verification E-mail does not get sent successfully, set the E-mail Status to 'Verification Not Sent'.
g. When the participant clicks the latest verification link before it has expired, set the 'E-mail Status' to 'Verified'.
h. To restart the E-mail verification process, the worker will need to modify the E-mail field to have a different e-mail address and save the record or click the 'Resend E-mail Verification' button to restart the process on the existing e-mail.
i. When the E-mail address is modified upon saving, the E-mail status is cleared. E-mail verification process will be re-initiated if conditions are met as stated in 2.1.3.1.a.

j. When the verification E-mail Status is updated, update the verification E-mail status date.
   Note: The E-mail status date is not viewable on the front-end.

2. Display buttons titled 'Resend E-mail Verification' next to the 'Edit' buttons (as shown in Figure 2.1.2).
   a. The buttons will only display in view mode and will be protected by the same edit rights that allow the worker to edit the Contact Detail page.
   b. The buttons will only display when the E-mail Status is either 'Pending Verification' or 'Verification Not Sent', 'Allow E-mail Reminders' is checked, and 'E-Notification' is not 'Opted-In.'
   c. Send only one verification e-mail within two minutes. Display a validation when the worker clicks the 'Resend E-mail Verification' button more than once within a two-minute period.
      i. The validation will display the following message "E-mail Verification has been sent. Please wait 2 minutes before sending an additional E-mail Verification."
      ii. To bypass the validation message, the worker will need to click the 'Resend Verification' button when the two-minute period has passed or click the blue 'Close' button which will return the worker back to the Contact Summary page.

   Note: If the worker resends a verification e-mail, the prior e-mail will no longer be valid, and the customer will need to click the link in the latest verification e-mail to be able to successfully complete the verification.
3. Update the 'Allow E-Mail Reminder' checkbox title text to instead display 'Allow E-mail Reminder'.

Note: The 'E-Notification' field is used only for participants with BenefitsCal accounts and is separate from the 'Allow E-mail Reminders' field. If the 'E-mail Status' is Verified and Opted-In for 'E-Notifications,' then another verification E-mail will not be sent when the 'Allow E-mail Reminders' option is checked.

Note: Due to existing functionality, contacts on cases marked with a Domestic Violence Case Flag and/or Domestic Violence Confidentiality are unable to receive E-mail reminders and will receive a page validation preventing the worker from saving the record.

Note: Updates made to the customer's contact information is stored as a historical record and is viewable in the Transaction History.

2.1.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Contact

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping to reflect the changes being made to the Contact Detail page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Customer Contact History

2.2.1 Overview

The Customer Contact History page allows the worker to access instances where a participant/beneficiary has contacted a County. This SCR will log records when a verification E-mail is sent to customers who allow E-mail reminders.

2.2.2 Customer Contact History Mockup

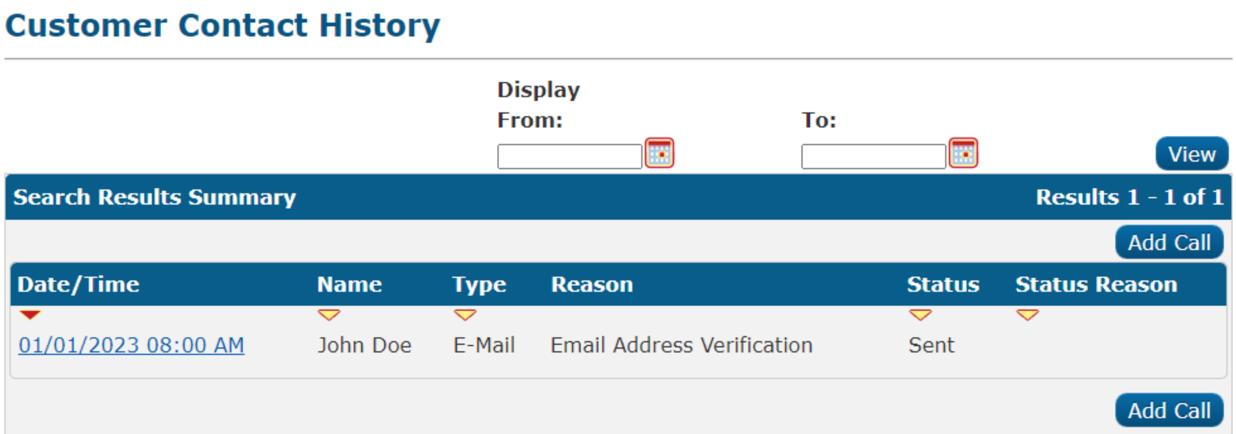


Figure 2.2.1 – Customer Contact History page when E-mail Verification is Sent

2.2.3 Description of Changes

1. Create a Customer Contact History record after a verification E-mail is sent to customers who allow E-mail reminders (as shown in Figure 2.2.1). It will contain the following field values:
    a. Date/Time
        i. This will be a hyperlink of the date/time the record was created that will lead to the Contact Detail page for the respective customer.
    b. Name
        i. This will be the name of the customer who was sent the E-mail.
    c. Type
        i. This will display 'E-Mail' as the type of contact.
    d. Reason
        i. This will display 'Email Address Verification' as the reason for contact.
    e. Status
        i. This will display 'Sent' when the verification E-mail was sent.
    f. Status Reason

i. This field will not display a value.
Note: This field is currently used to capture the status reason code for text messages.

Note: Customer Contact History records are case-level records.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Customer Contact History

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Email Reminder Verification Batch

2.3.1 Overview

Send a one-time validation e-mail to existing participants that currently have the "Allow E-Mail Reminder" option checked, but do not have a Verified e-mail. These emails will be triggered through batch.

2.3.2 Description of Change

1. Create a new batch job that does the follow:

    a. Identifies the following target population:

        i. Contact Detail page identifies the contact person with all the following:

            1. The 'Allow E-mail Reminder' field is checked.
            2. The E-mail verification status is not "Verified" and not "Pending Verification"~~, and is not empty/blank.~~

                <u>Notes:</u> A "Pending Verification" status implies that the Contact Detail page recently triggered a verification email to be sent. Contacts should not be sent additional verification emails if they already have one that has not expired yet.

3. The E-mail Address field is not empty.

ii. Contact person's E-Notification dropdown is set to "Opt-Out"

iii. Contact person meets one or more of the following conditions:
- Scenario #1
    a. The person is in any program, where their person-status on the program is "Active", "Ineligible", or "Pending"
    b. The person-status on the program is currently effective or is effective at any point in the future.

- Scenario #2
    a. The person has <u>**no**</u> programs where their person-status on the program is Active, Ineligible, or Pending
    b. The person has any program that their person-status has been Active, Ineligible, or Pending in the past year, starting from the date when the target population is being identified.

- Scenario #3
    a. The person is associated to any program that was created within the last year, starting from the date when the target population is being identified.

ii. Contact person's email address is in a valid format.

<u>**Note:**</u> Reproduce the same email format validation that already exists on the Contact Detail page. The existing validation is <u>not</u> part of this design document. The Contact Detail page's validation should have already been performed on the email address' format. However, the same validation is required to be triggered again just before any email is sent to the target email address. This is a security standard.

b. Sends a verification email to everyone in the target population. Each contact person in the target population will get a separate email.

<u>**Note**</u>: Send the same email as defined in the Contact Detail page change recommendations. That includes but is not limited to how to populate the email fields, generate the verification code, and what languages to support.

c. Update the verification status on the Contact Detail page to reflect the success or failure of sending a verification email.

   Note: Follow the same verification status change requirements as defined in the Contact Detail page change recommendations.

d. Send a maximum of 100K verification emails per day. If there are remaining verifications email to send for the target population, wait until the following scheduled batch run to process more of the population.

   Note: The CalSAWS email service has a maximum daily cap of 275K emails that can be sent during the same day. Anything over that and the email service will throw errors. To limit the potential of causing CalSAWS to no longer be able to send emails for other services, the full load of verification emails may have to be sent over multiple different days.

e. Send a maximum of 20 emails per second.

   Note: The CalSAWS email service can only process sending 25 emails a second. By limiting the verification emails to 20 per second that leaves some space for other functional areas to use the email service too.

2. Run the new batch job only one time a day, during nightly batch.
   a. Stagger the job's runs over multiple days, if the target population is larger than the maximum emails the batch job is permitted to send in a single day. Each night will process a subset of the total target population until the entire population is processed.

2.3.3 Partner Integration Testing

N/A

2.3.4 Execution Frequency

Once daily, until all the target population has been sent a verification email.

2.3.5 Key Scheduling Dependencies

N/A – No dependencies required.

2.3.6 County Impacts

All counties.

2.3.7 Category

CORE

2.3.8 Data Volume/Performance

Sends an estimated 240,000 verification emails total. Limited to 100K emails per day and limited to sending 20 emails per second.

2.3.9 Interface Partner

N/A

2.3.10 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e. rerunning the job, delaying the run, contacting appropriate parties for server issues, etc.)

2.4 Appointment Email Reminders

2.4.1 Overview

Regression test some features of batch Appointment E-mail Reminders, from SCR CA-207130. CA-207130 introduced a new batch job functionality to send E-mail Reminders to customers with upcoming appointments. The appointment reminders are dependent on the customer's email being verified.

2.4.2 Description of Change

1. Regression Test the following aspects of the Appointment Email Reminder batch job:
    a. When a sent email bounces back as "Undeliverable," all the following occurs on the customer's Customer Contact Detail page:
        i. Update the 'Allow E-mail Reminder' checkbox to unchecked.
        ii. Update the 'E-Notification' dropdown to 'Opt-Out'
        iii. Update the email verification status to 'Undeliverable' (UD).
    b. When a sent email bounces back as "Undeliverable," a journal is written stating the customer's email was undeliverable and the customer has been opted out of E-mail reminders and notifications

2.4.3 Partner Integration Testing

N/A

2.4.4 Execute Frequency

N/A

2.4.5 Key Scheduling Dependencies

N/A

2.4.6 County Impacts

N/A

2.4.7 Data/Volume/Performance

N/A

2.4.8 Interface Partner

N/A

2.4.9 Failure Procedure/Operational Instructions

N/A

2.5 Automated Regression Test

2.5.1 Overview

Create a new automated regression test script to verify that after a verification email is sent, a matching record displays on the Customer Contact History page.

2.5.2 Description of Change

1. Create a new regression script(s) to send a verification e-mail through the Contact Detail page and verify that a record with the appropriate details displays on the Customer Contact History page.
   Technical Note #1: The new script(s) should cover verification e-mails that are triggered by both of the following actions:
   a. Clicking either the 'Save' or 'Save and Return' button on the Contact Detail page in edit mode
   b. Clicking the 'Resend Verification' button on the Contact Detail page in view mode

   Technical Note #2: Neither verification that the e-mail is successfully delivered, nor the content of the e-mail message are in scope for these scripts.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.20	The LRS shall support multiple means of communicating appointments, appointment reminders, and critical dates and/or information that may affect a participant's eligibility, using the following means: a. E-Mail; b. Text messaging; d. Automated phone reminder; e. USPS mail	This SCR will update the process to allow a participant to receive e-mail reminders.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-247709

Design of Release of Information for CBOs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gillian Noelle Bendicio, Jennifer Muna, Farhat Ulain, Phong Xiong
	Reviewed By	Connie Buzbee, Dymas Pena, Melissa Mendoza, Jason Horton

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/19/2022	.1	Initial Revision	Gillian Noelle Bendicio, Jennifer Muna, Farhat Ulain, Phong Xiong
01/11/2023	.2	Updated design per Committee Review	Jennifer Muna
01/17/2023	.3	Added ForgeRock requirements in section titled 'ForgeRock – CBO Organization API'	Jennifer Muna
01/25/2023	.4	Added mailing requirements in section 2.13.4	Phong Xiong
02/01/2023	.5	• Added additional page mock-ups and details for Release of Information Search requirements section • Added Select Person Page section • Added additional mock-ups and details for Release of Information Detail section • Added mock-up update and additional requirements for Case Summary section • Updated the Select Community Based Organization section and Select CBO Managers & Assisters for Medi-Cal section on how these pages are being accessed. • Added additional update requirement to Case Inquiry API section • Added Security Matrix under the Support Document section	Jennifer Muna, Erika Kusnadi

2/20/2022	.6	Design updates to: • Include new column for DOC_TEMPL_LANG table o Add additional CBO- Case Detail API requirements to exclude Minor Consent Cases	Phong Xiong, Jennifer Muna
2/24/2023	.7	Added additional details to CBO - Notices API requirements	Jennifer Muna
3/9/2023	.8	Design Clarification for CBO - Case details section. Data Element: Benefit Award Description to reflect correct issuance information description	Jennifer Muna

2/15/2022	.9	Content Revision 1
		• Updated 2 validations and associated mockups on Section 2.1 (Release of Information Search)
		• Change CIN Number to CIN
		• Updated Section 2.3 (Release of Information Detail) Description of Changes and all appropriate mockups (section 2.3.2 to match)
		  o Fields are editable when in Edit mode
		  o Added new Validations
		  o Added Approved status to be available when the latest status is Revoked.
		  o Added information on how the "Expired" status will look on the Detail page in Edit mode.
		• Updated "Medi-Cal Reason for Sharing Information" to "Medi-Cal Reason(s) for Sharing Information".
		• Updated Selected CBO and Select Manager and Assister for Medi-Cal pages by adding new mockups and description of changes.
		• Updated ROI API attribute
			Jennifer Muna, Farhat Ulain, Erika Kusnadi

		table by adding clarification on CBO Manager/Assister. • Updated Journal entry – Journal category to 'Self Service' • Updated Supporting document list • Added Assumption #18 and removed requirement in ROI API regarding Document Routing Rule task generation	

Table of Contents

1 OVERVIEW

This System Change Request (SCR) will document the changes in CalSAWS to support the Release of Information (ROI) feature in the Self-Service Portal. This feature will allow the applicant/recipient to release their case information to a Community Based Organization (CBO) through the Self-Service Portal.

Per All County Letter (ACL) 16-02, non-privileged, non-confidential documents in a case record can only be accessed by the client who is the subject of the case record. However, a client may provide a written authorization through an ROI for another person or group to gain access to the case information. This guidance applies to the CBO Application Assisters (AAs) who assist clients in applying for and retaining their benefits. Currently, the ABCDM 228, Applicant's Authorization for Release of Information, is used when clients wish to grant access to case-level information to an agency, institution, or individual.

Per SCERFRA 22-524, the State is introducing a form 'ABCDM 229 -Applicant/Recipient's Authorization For Release Of Information To Community-Based Organization (CBO) In BenefitsCal'. This form is a formal agreement from the customer to the County to grant a CBO access, via the Self-Service Portal, to specific case information.

1.1 Current Design

CalSAWS only sends case information and notices to the Self-Service portal for a primary applicant on a program. There is no supported Application Programming Interface (API) to allow CalSAWS to send case information to a CBO's Self-Service Portal account. The CalSAWS Forms API does not support the 'ABCDM 229 - Applicant/Recipient's Authorization For Release Of Information To Community-Based Organization (CBO) In BenefitsCal' document type in the Hyland imaging system.

CalSAWS does not have the online feature to view or create an applicant/recipient's CBO Release of Information (ROI) in the System. The 'ABCDM 229 - Applicant/Recipient's Authorization For Release Of Information To Community-Based Organization (CBO) In BenefitsCal' state form does not exist in the CalSAWS Template Repository.

1.2 Requests

1. Create a new API to support the Self-Service Portal implementation of the CBO Release of Information form submitted through a digital format, via document upload, and/or by paper submission.
2. Update the Forms API to accept the new CBO ROI form and upload to the imaging system.
3. Create new page(s) in CalSAWS to enable a county worker to add/create, view, and edit a customer's CBO ROI information for BenefitsCal.
4. Create a new API to call the ForgeRock webservice, in real-time, to pull approved CBO names, managers, and/or assisters.
5. Create a new API to send a customer's specified case information to the Self-Service portal based on the information provided on the CBO ROI form.

6. Add the 'ABCDM 229 - Applicant/Recipient's Authorization For Release Of Information To Community-Based Organization (CBO) In BenefitsCal' form to the Template Repository in CalSAWS. Set the "Send to BCAL" flag to "Y".
7. Create an automatic Journal entry when an Approved, Pending or Revoked CBO ROI status is received via the API.
8. Create new Batch job to update an ROI status to 'Expired' when the end date has passed and create a Journal entry for the Expired ROI.

1.3 Overview of Recommendations

1. Create an API that will save the CBO ROI information, update the Status of the CBO ROI and retrieve the CBO ROI information.
2. Create an API that will retrieve the Customer's case information for the CBO based on what the applicant/recipient indicated in their CBO ROI form.
3. Create an API that retrieves the applicant/recipient's notices for the CBO based on what the applicant/recipient indicated in their CBO ROI form.
4. Create a new endpoint to the Forms API that will generate the CBO ROI form in PDF format, map the applicant/recipient's answers to the PDF, and upload the PDF to the imaging system.
5. Add the ABCDM 229 CBO ROI form to the Template Repository in CalSAWS. The CBO ROI form's XML Data Package (XDP) must allow data to be mapped onto the form.
6. Create an online search page that allows a worker to view, add/create, and edit ROI detail records.
7. Create an ROI detail page that displays the CBO ROI information entered by the worker or created through the Self-Service portal API.
8. Create a series of online pages that will allow the User to search for the CBO identified by the Customer by making a call to ForgeRock webservice.
9. Update the Case Summary page to display the CBO name for the Customer's active CBO ROIs, for the County.
10. Create an automatic Journal Entry when an Approved, Pending or Revoked ROI status is received via the API.
11. Add document type for CBO ROI form to the imaging system when received via document upload.
12. Create a new batch job to automatically set an ROI detail status to 'Expired' based on the end date of the CBO ROI and create a Journal entry.
13. Modify the Imaging 'View' URL to point to CBO ROI documents associated to a customer, in the imaging solution.

1.4 Assumptions

1. The updates detailed in this SCR are exclusive to the 'ABCDM 229 - Applicant/Recipient's Authorization For Release Of Information To Community-Based Organization (CBO) In BenefitsCal' form. All other Release of Information forms are not supported in this SCR.
2. CBO managers will be the only ones to have access to the case information, for the selected CBO, with a CBO ROI form for CalWORKs (CW), CalFresh (CF),

and Medi-Cal (MC) with the implementation of this SCR. If Medi-Cal (MC) is selected, the customer has the option to indicate the assister's or CBO Manager's name for the ROI. If the assister's name field for Medi-Cal is blank, we assume that all CBO managers for the provided organization will have access to the customer's information for Medi-Cal.

3. Person IDs and organization mapping exists in ForgeRock. CBO agreements will continue to exist in ForgeRock. The County's ForgeRock delegated Admin will have to manually maintain the list of CBOs with the county specific contracts/agreements.
4. This SCR will only encompass the initial load of State and or County agreements with a CBO. Any CBO agreement updates after implementation will be addressed as a future enhancement.
5. In the occasion of an Inter-County Transfer (ICT), the customer will be responsible for initiating a new ROI in the new county. The existing ROI in the previous county will remain active until it expires, unless specified instructions from customer to 'Revoke' is communicated to the county worker or sent through the API.
6. The CBO ROI form will only be available for Medi-Cal, CalWORKs, and CalFresh programs, as indicated in the ABCDM 229 form.
7. The CalSAWS ROI API will pass the customer's ROI details and display on the Release of Information Detail page given the customer's unique identifier passed from the Self-Service Portal.
8. The date of signature will be the date used to pull the client case data and send to the Self-Service Portal.
9. Any historical NOAs generated before the ROI Signature date will not be returned in the client data shared, with the CBO, to the Self-Service Portal.
10. For performance efficiency, CalSAWS will display a maximum of 1 years' worth of ROIs at a time when applying a search criterion on the Release of Information and CBO search pages.
11. Termination reasons are the only additional data to display as the case history to BenefitsCal in CBO's dashboard. All other case information sent to the CBO's dashboard will be defined by the Customer.
12. County workers can accept and review a paper CBO ROI form outside of Self-Service portal. The CBO ROI (ABCDM 229) form will be available in the Template Repository in CalSAWS for workers to generate for the customer.
13. The new CBO ROI (ABCDM 229) form will not be pre-populated or automatically generated via Batch, in CalSAWS.
14. The new form is only implemented in English and Spanish until the other threshold languages are made available by the State. Other languages will be implemented in a future SCR once they are available.
15. Task creation from the receipt/image of documents are accomplished with Document Routing Rule functionality. There are no Task Management modifications necessary with this enhancement.
16. Document routing rule tasks functionality will remain unchanged. CalSAWS counties will be able to configure a document routing rule task based on the CBO ROI document type.

17. All existing functionalities will remain unchanged unless called out as part of this SCR.
18. Document Routing Rule task creation for received ABCDM-229 form with 'Pending' status will be addressed in CA-259087.

2 RECOMMENDATIONS

2.1 Release of Information Search

2.1.1 Overview

In the Self-Service portal, customers and CBOs have an option to initiate a Release of Information (ROI). The ROI will allow the CBOs to access the permissible case information of the customer. Release of Information Search page will allow the user to search for the ROIs associated to the selected person. Users can view, edit, and add a CBO ROI from this page. Users will be able to view a list of CBO ROI records on the Release of Information Search page.

2.1.2 Release of Information Search – Task Navigation

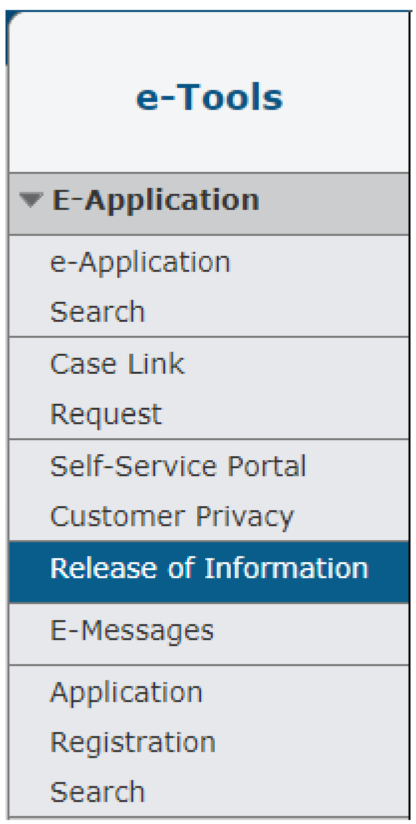


Figure 2.1.2-1 - Release of Information-Task Navigation

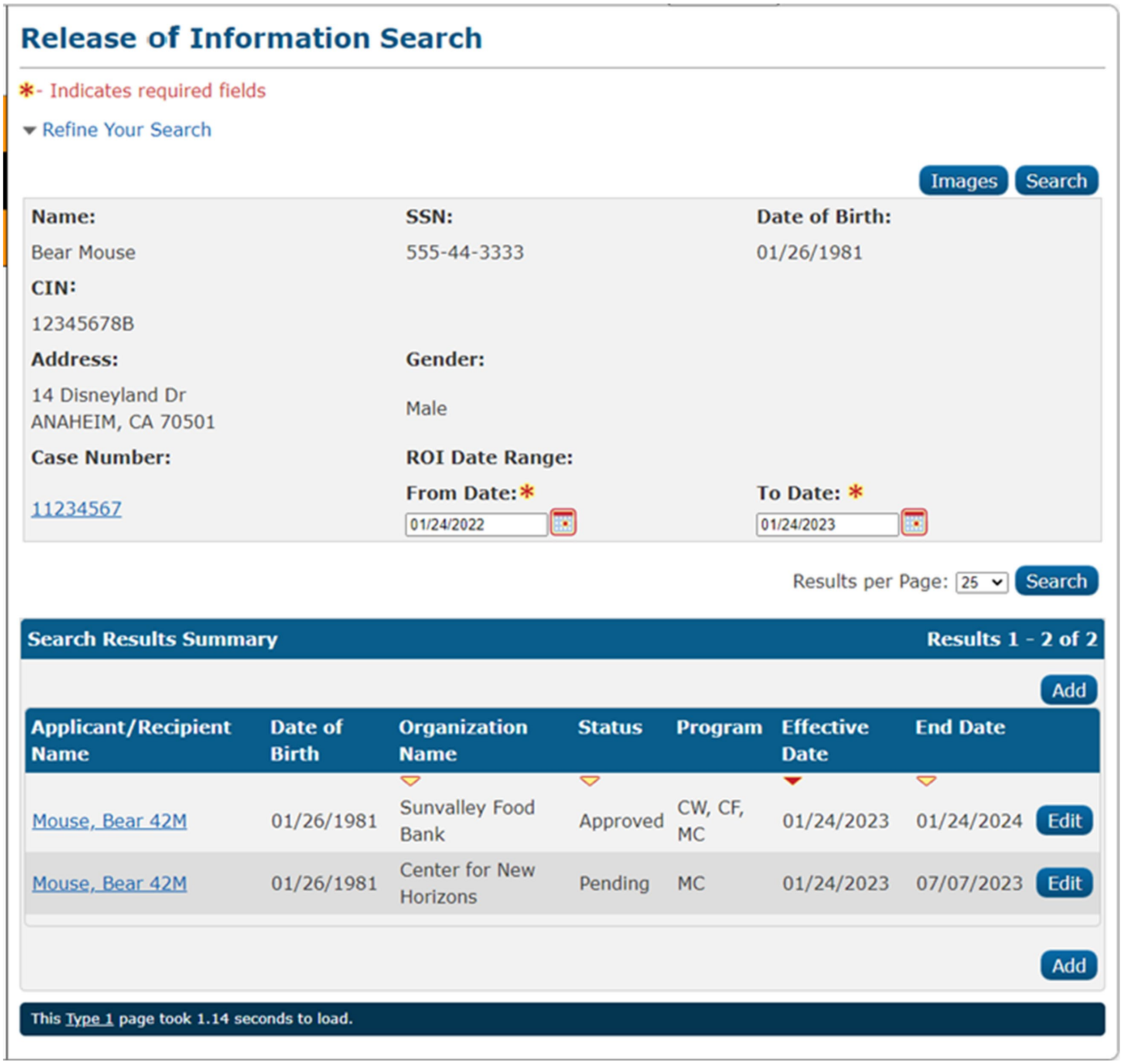


Figure 2.1.2-2 – Release of Information Search Page - Upon loading

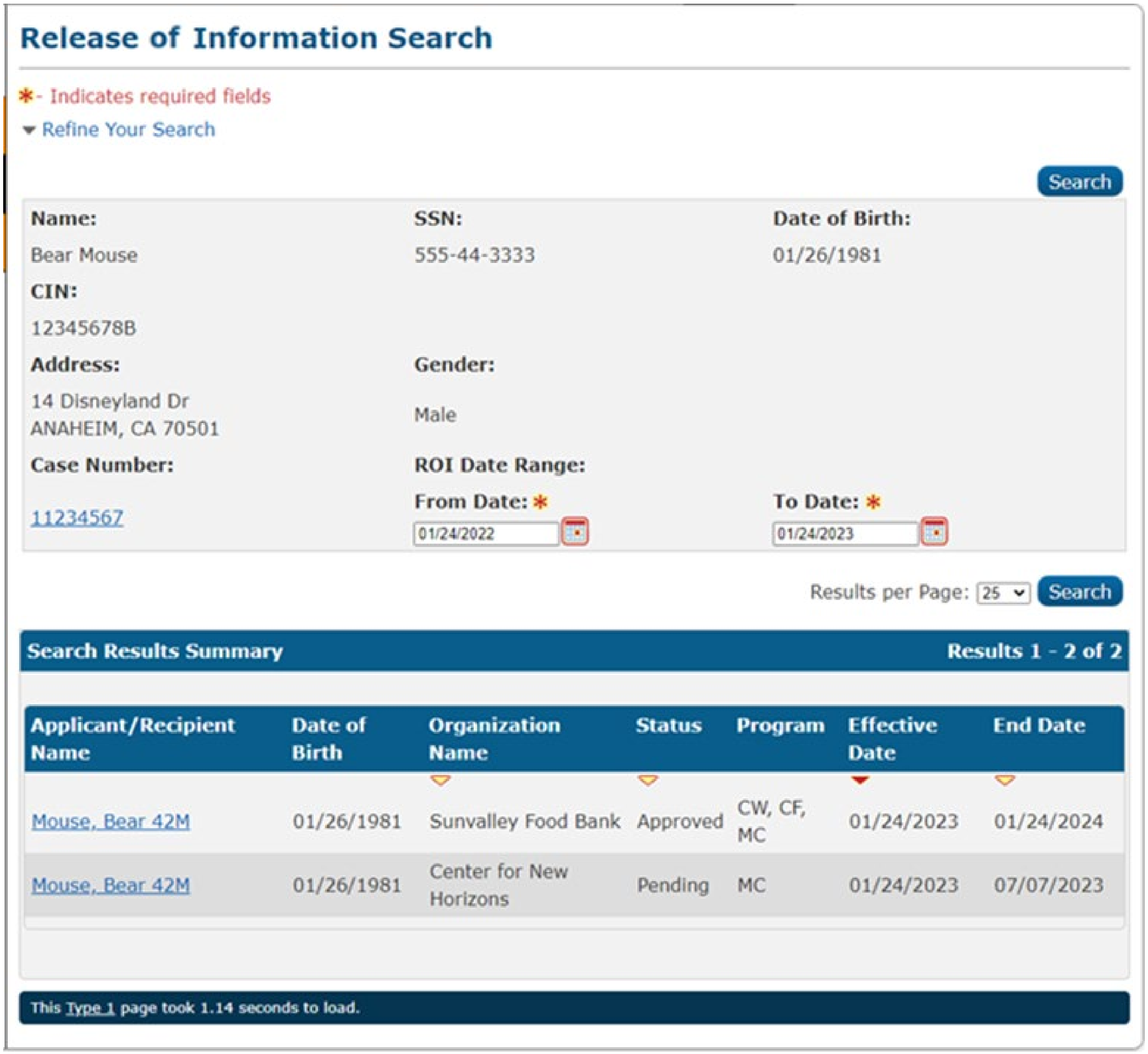
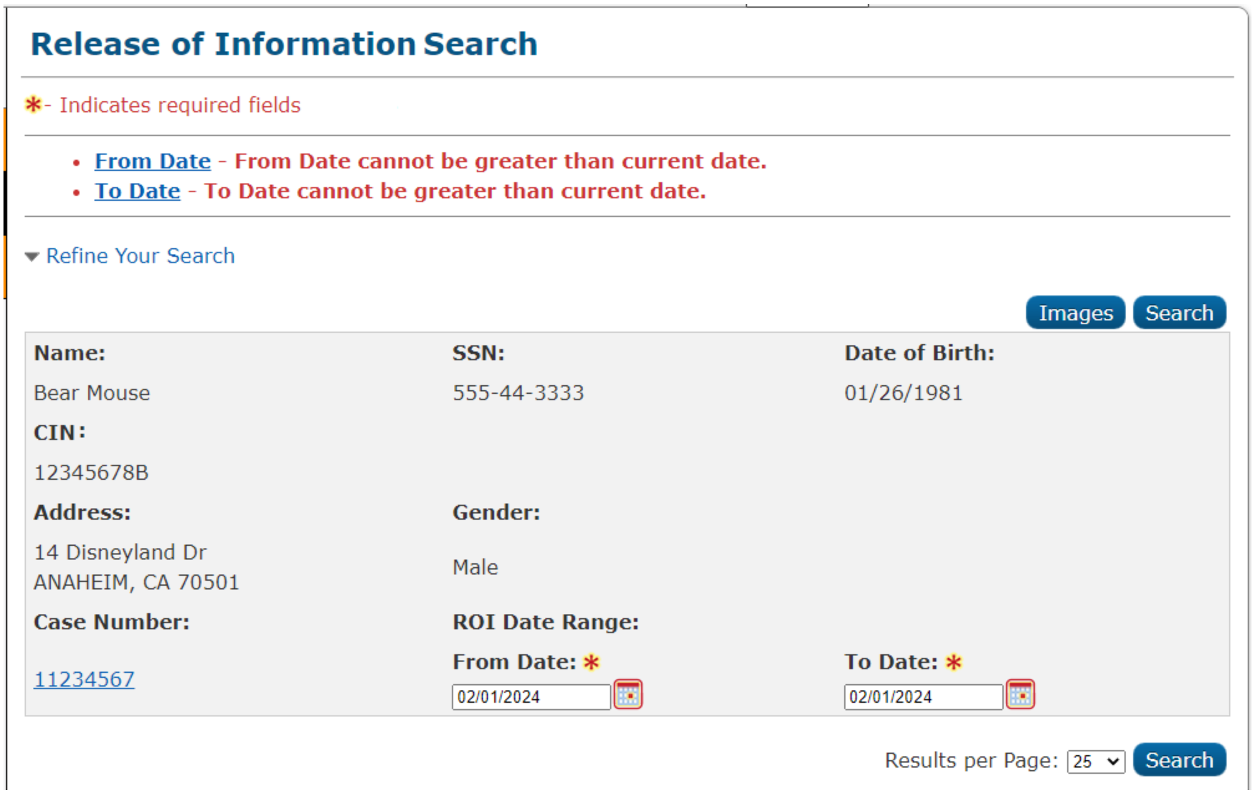


Figure 2.1.2-3 – Release of Information Search Page – No Imaging security right and Edit security right.



Release of Information Search

*- Indicates required fields

- From Date - From Date cannot be greater than current date.
- To Date - To Date cannot be greater than current date.

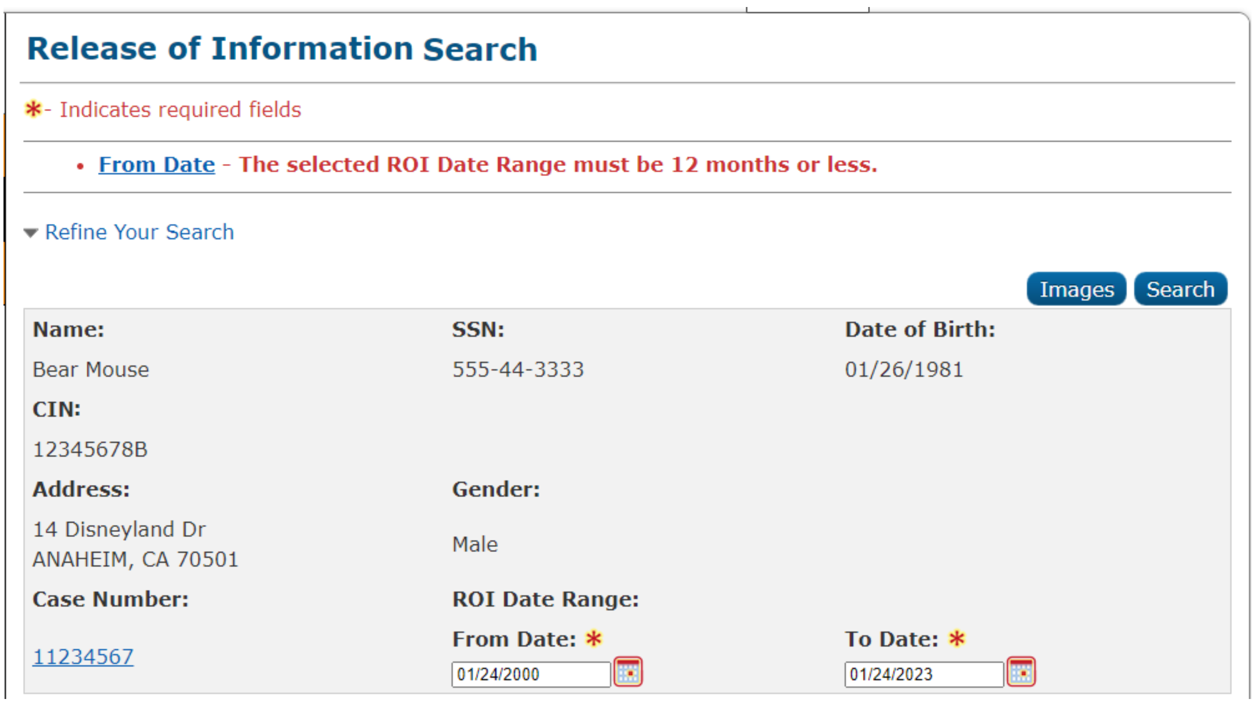
▼ Refine Your Search

Images Search

Name:	**SSN:**	**Date of Birth:**
Bear Mouse	555-44-3333	01/26/1981
CIN:		
12345678B		
Address:	**Gender:**	
14 Disneyland Dr ANAHEIM, CA 70501	Male	
Case Number:	**ROI Date Range:**	
11234567	**From Date:** * 02/01/2024	**To Date:** * 02/01/2024

Results per Page: 25 Search

Figure 2.1.2-4 – Release of Information Search Page – Cannot be greater than system date validation



Release of Information Search

*- Indicates required fields

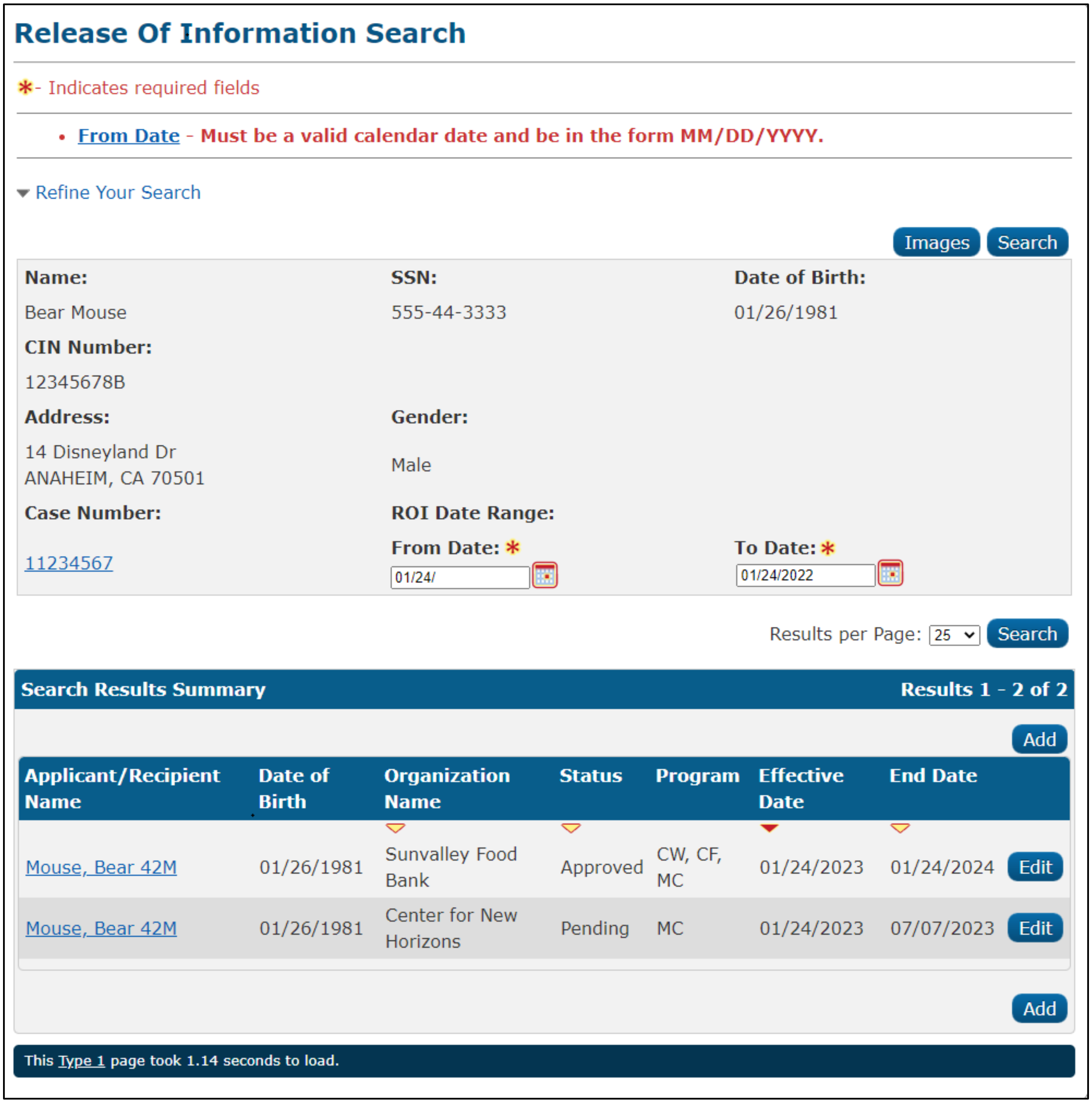
- From Date - The selected ROI Date Range must be 12 months or less.

▼ Refine Your Search

Images Search

Name:	**SSN:**	**Date of Birth:**
Bear Mouse	555-44-3333	01/26/1981
CIN:		
12345678B		
Address:	**Gender:**	
14 Disneyland Dr ANAHEIM, CA 70501	Male	
Case Number:	**ROI Date Range:**	
11234567	**From Date:** * 01/24/2000	**To Date:** * 01/24/2023

Figure 2.1.2-5 – Release of Information Search Page – Cannot be more than 12 months validation



Release Of Information Search

*- Indicates required fields

- From Date - Must be a valid calendar date and be in the form MM/DD/YYYY.

Refine Your Search

Images Search

Name: Bear Mouse
SSN: 555-44-3333
Date of Birth: 01/26/1981
CIN Number: 12345678B
Address: 14 Disneyland Dr ANAHEIM, CA 70501
Gender: Male
Case Number: 11234567
ROI Date Range:
From Date: * 01/24/
To Date: * 01/24/2022

Results per Page: 25 Search

Search Results Summary **Results 1 - 2 of 2**

Add

Applicant/Recipient Name	Date of Birth	Organization Name	Status	Program	Effective Date	End Date	
Mouse, Bear 42M	01/26/1981	Sunvalley Food Bank	Approved	CW, CF, MC	01/24/2023	01/24/2024	Edit
Mouse, Bear 42M	01/26/1981	Center for New Horizons	Pending	MC	01/24/2023	07/07/2023	Edit

Add

This Type 1 page took 1.14 seconds to load.

Figure 2.1.2-6 – Release of Information Search Page – From Date must be in the correct format validation

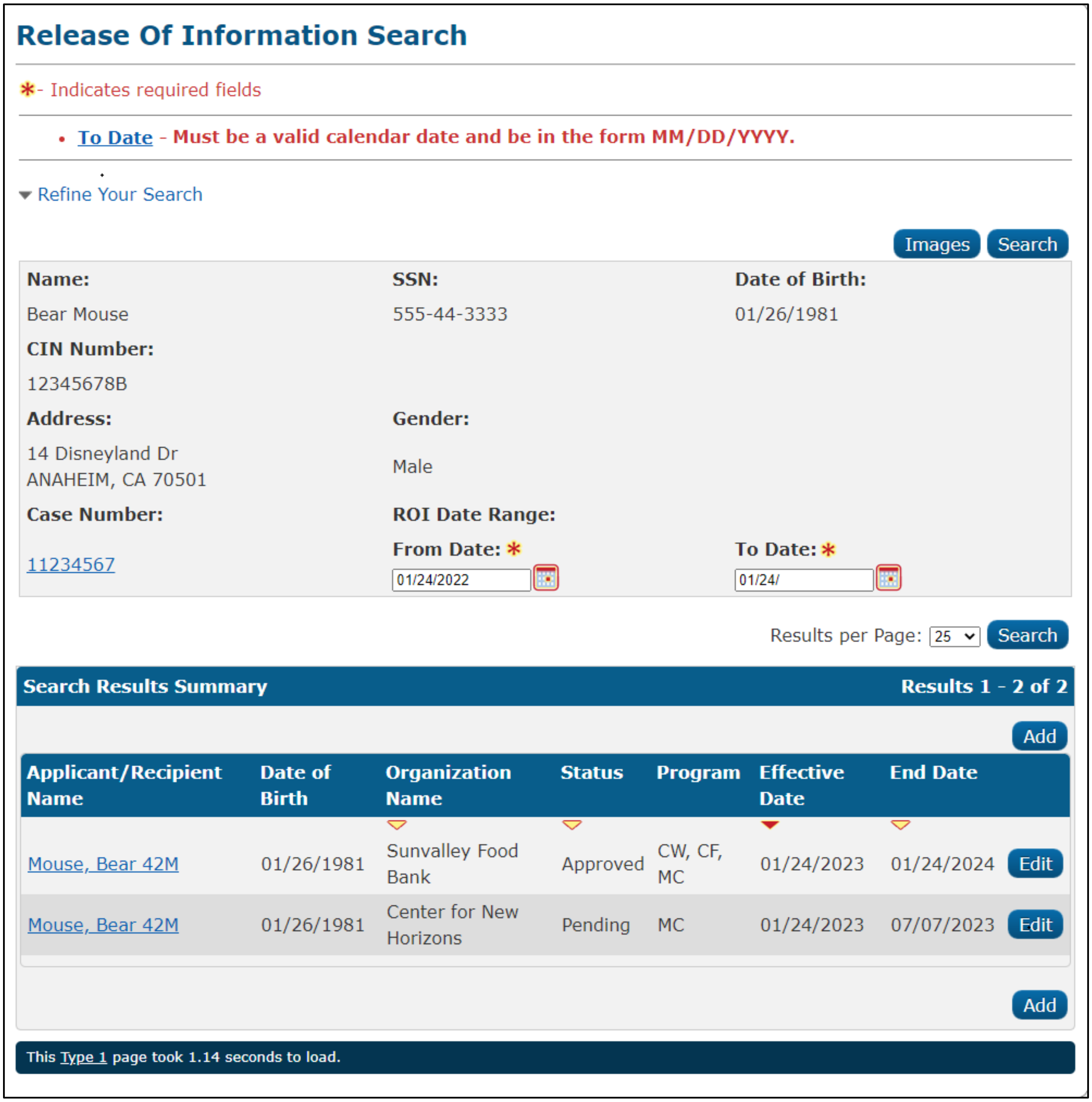


Figure 2.1.2-7 – Release of Information Search Page – To Date must be in the correct format validation

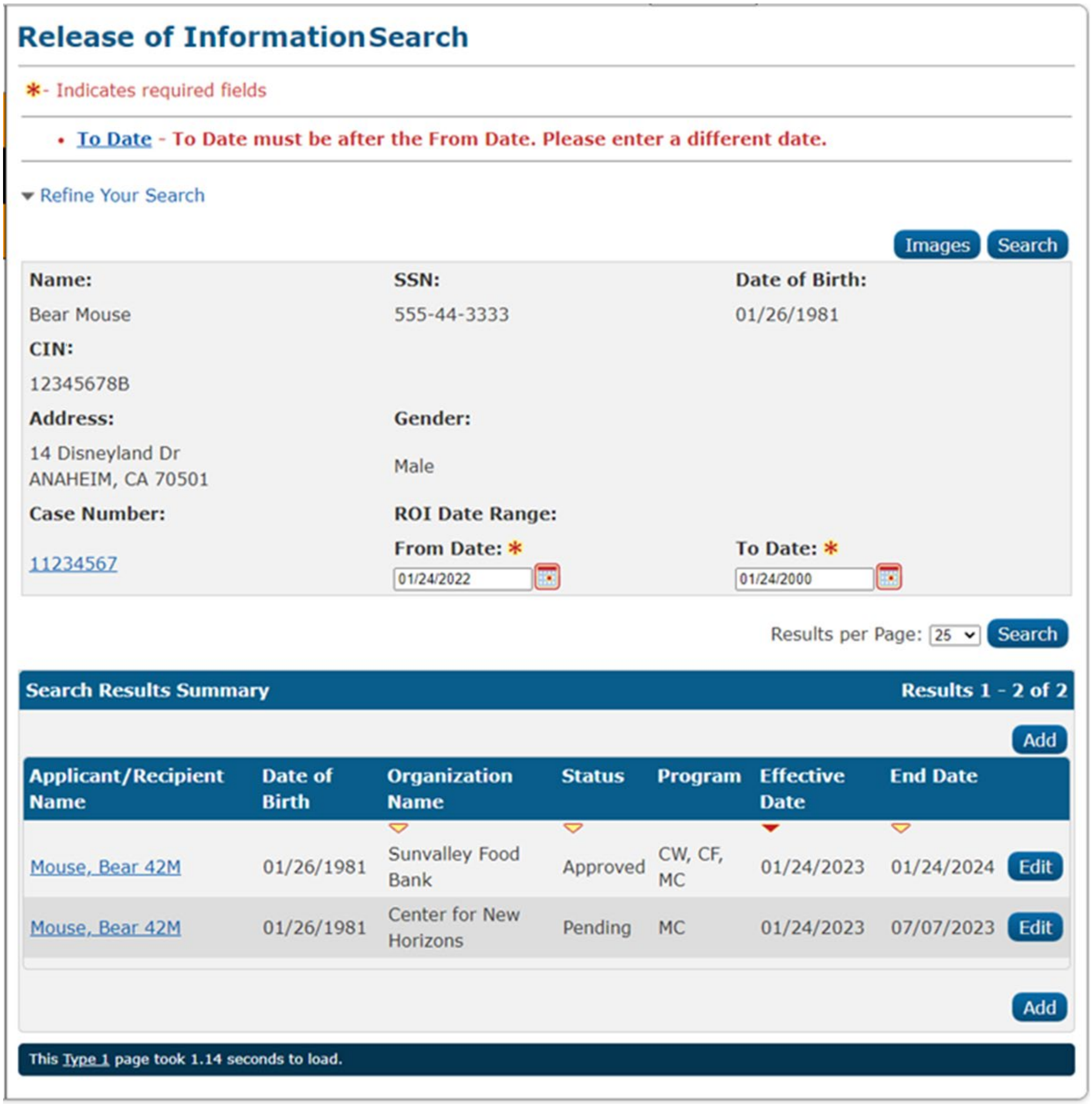


Figure 2.1.2-8 – Release of Information Search Page – To Date must be after the From Date validation

2.1.3 Description of Changes

1. Add a new Navigation Task to the e-Tools Local Navigator.
    a. New Navigation task will be titled ‘Release of Information’ and will be located below ‘Self-Service Portal Customer Privacy’ as shown on Figure 2.1.2-1.
    b. Clicking on the ‘Release of Information’ navigation task will direct the user to the ‘Select Person’ page.

Note: This will work similarly to the 'Self-Service Portal Customer Privacy' navigation task.

c. The 'Release of Information' navigation task will only be visible for users that are assigned to the 'ReleaseofInformationSearchView' security right or the 'ReleaseofInformationSearchEdit' security right.

2. Create a new 'Release of Information Search' page.
    a. This page will be accessible by clicking on the newly created 'Release of Information' navigation task and selecting a person through the 'Select Person' page.
    b. Upon loading, the 'Release of Information Search' page will display the following information:
        i. Refine Your Search section
            1. The Refine Your Search section will be visible with the following parameters prepopulated:
                a. Name
                    i. This field will not be editable and will automatically be populated with the name of the person that was selected from the 'Select Person' page.
                    ii. Name will be in the format of First Name Last Name (Example: Tom Bradley)
                b. SSN
                    i. This field will not be editable and will automatically be populated with the Social Security Number of the person that was selected from the 'Select Person' page.
                    ii. SSN will be in the format of XXX-XX-XXXX.
                c. Date of Birth
                    i. This field will not be editable and will automatically be populated with the Date of Birth of the person that was selected from the 'Select Person' page.
                    ii. Date of Birth will be in the format of MM/DD/YYYY.
                d. CIN
                    i. This field will not be editable and will automatically be populated with the CIN of the person that was selected from the 'Select Person' page.
                e. Address
                    i. This field will not be editable and will automatically be populated with the

Mailing address of the person that was selected from the 'Select Person' page.

ii. Address will be in the format of
Address Line 1
Address Line 2 (if one is available)
City, State Postal Code.

f. Gender
    i. This field will not be editable and will automatically be populated with the Gender of the person that was selected from the 'Select Person' page.
g. Case Number
    i. This field will not be editable and will automatically be populated with a list of Case Numbers for the selected person.
        1. The list of Case Numbers displayed will only be for cases that are in the same county of the logged in user.
        2. Case Number will display as a hyperlink. Clicking the hyperlink will take the user to the Case Summary page.
h. ROI Date Range:
    i. The date range refers to the creation date of the ROI regardless of if it is created through the Self-Service Portal or worker created.
    ii. The From Date: and To Date: fields are required fields.
    iii. From Date:
        1. The user can enter their desired From date or click on the calendar icon to select the date.
        2. From Date will need to be in the form of: MM/DD/YYYY. (Example: 12/25/2022)
        3. The field will automatically be populated with the date of 12 months prior to the current system date when the page initially loads.

iv. To Date:
    1. The user can enter their desired To Date or click on the calendar icon to select the date.
    2. To Date will need to be in the form of: MM/DD/YYYY. (Example: 12/31/2022)
    3. The field will automatically be populated with the current system date when the page initially loads.

v. The ROI date range can only be 12 months or less.

vi. Create the following validation messages to be triggered upon clicking the Search button:
    1. From Date – Must be a valid calendar date and be in the format MM/DD/YYYY.
        a. This validation is triggered when the user clicks on Search and the value entered on the From Date is not in the correct format (MM/DD/YYYY) or is not a valid calendar date.
    2. To Date – Must be a valid calendar date and be in the format MM/DD/YYYY.
        a. This validation is triggered when the users clicks Search and the value entered on the To Date is not in the correct format (MM/DD/YYYY) or is not a valid calendar date.
    3. To Date – To Date must be after the From Date. Please enter a different date.
        a. This validation is triggered when the

users clicks on Search and the value on the To Date is prior to the From Date

4. ~~{From/To Date}~~ To Date – To Date cannot be greater than current date.
    a. This validation is triggered when the user clicks on Search and the value entered on the ~~From Date and/or the~~ To Date is after the current date.
5. From Date – From Date cannot be greater than current date.
    a. This validation is triggered when the user clicks on Search and the From Date is after the current date.
6. From Date – The selected ROI Date Range must be 12 months or less.
    a. This validation is triggered when the user clicks on the Search date and the date range entered on the From and To Date is longer than 12 months.

i. Results per Page:
    i. This dropdown limits how many records displays ~~pulled~~ per results per page.
    ii. The options are:
        1. 25 (default)
        2. 50
        3. 75
        4. 100

j. Search button
    i. Clicking this button loads the search results, based on the search parameters.

ii. Search Results Summary section
   1. Applicant/Recipient Name
      a. This will display the name of the Primary Applicant of the ROI supported program. **Note**: This will be the name of the Person for whom the CBO ROI record is created.
      b. It will have the format of Last Name, First Name, Age, Gender (Example: Duck, Donald 50M)
      c. The name of the Primary applicant will be a hyperlink.
         i. Clicking the hyperlink will direct the user to the 'Release of Information Detail' page for this CBO ROI record in view mode.
   2. Date of Birth
      a. This will display the date of birth of the primary applicant (the date of birth of the person that the ROI record was created for).
      b. This will display in the format of MM/DD/YYYY.
   3. Organization Name
      a. This is a sortable column that displays the name of the Community-Based Organization (CBO) recorded on the Release of Information Detail page.
         i. Clicking on the sortable arrow will order the Search Result Summary Section by the Organization name.
   4. Status
      a. This is a sortable column that will display the latest status of the CBO ROI (Release of Information) record.
         i. Clicking on the sortable arrow will order the Search Result Summary Section by the Status.
   5. Program
      a. This will display the list of selected programs that is associated to the CBO ROI record.
         i. The list of programs will be separated by commas and will be in the order of CW, CF, MC.
            1. Example: CW, CF, MC
            2. Example 2: CF, MC
            3. Example 3: CW, MC
   6. Effective Date

a. This is a sortable column that will display the effective date of the ROI record.
    i. This will be the Signature Date that is entered on the Signature Information block on the Release of Information Detail page.
    ii. Clicking on the sortable arrow will order the Search Result Summary Section by the Effective Date.
b. Effective Date will be in the format of MM/DD/YYYY.

7. End Date
    a. This is a sortable column that will display the end date of the CBO ROI record.
        i. This will be the End Date on the Signature Information block on the Release of Information Detail page.
        ii. Clicking on the sortable arrow will order the Search Result Summary Section by the End Date.
    b. End Date will be in the format of MM/DD/YYYY.
8. Edit button
    a. Clicking the Edit button will direct the user to the Release of Information Detail page for this ROI record in Edit mode.
    b. The Edit button will only display for users that are assigned to the 'ReleaseofInformationSearchEdit' security right.
9. Upon loading, the page will automatically display the ROI records that were created in the past 12 months from the system date for the selected person under the Search Result Summary section.
    a. Result will only display ROI records that were created for a person ~~case~~ that belongs to the same county as the logged in user.
    b. The initial search result pulled is ordered by the Effective Date in descending order.

iii. Add button
    1. Clicking this button will navigate the user to the Release of Information Detail page in Create mode.
    2. This button will only display for users that are assigned to the 'ReleaseofInformationSearchEdit' security right.

iv. Images button

1. Clicking this button will open the Hyland imaging solution in a new window.
2. This button will only display to users that are assigned to either the 'ImagingSearchCase' security right or the 'ImagingSearchPerson' security right.

2.1.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** Release of Information

2.1.5 Security Updates

Security Right	Right Description	Right to Group Mapping
ReleaseofInformationView	Ability to search for and view the Release of Information Detail pages.	Release of Information View
ReleaseofInformationEdit ReleaseofInformationView	Ability to search for, view and add Release of Information Detail pages.	Release of Information Edit

Security Group	Group Description	Group to Role Mapping
Release of Information View	Ability to search for and view the Release of Information Detail pages.	Clerical Supervisor, Eligibility Staff, Eligibility Supervisor, Employment Services Supervisor, Hearings Staff, Hearings Supervisor, Help Desk Staff, Quality Assurance Staff, Quality Assurance Supervisor, Regional Call Center Staff, Regional Call Center Supervisor, Special

Security Group	Group Description	Group to Role Mapping
		Investigations Staff, Special Investigations Supervisor
Release of Information Edit	Ability to search for, view and add Release of Information Detail pages.	Eligibility Staff, Eligibility Supervisor

2.1.6 Page Mapping

Create page mapping for the Release of Information Search page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Select Person Page

2.2.1 Overview

The Select Person page allows users to search and select person(s) known to the system. This SCR will update the Select Person page to only return results where the person(s) is associated to cases that belongs to the same county as the logged in user when the page is accessed through the Release of Information task navigation.

2.2.2 Select Person Page Mockup

N/A

2.2.3 Description of Changes

1. Update the Select Person page to only return person(s) that match the search parameters and are associated to cases that belong to the same county as the logged in user.
    a. This will only apply when the Select Person page is accessed through the Release of Information navigation task.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools

- **Task:** Release of Information → Select Person

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

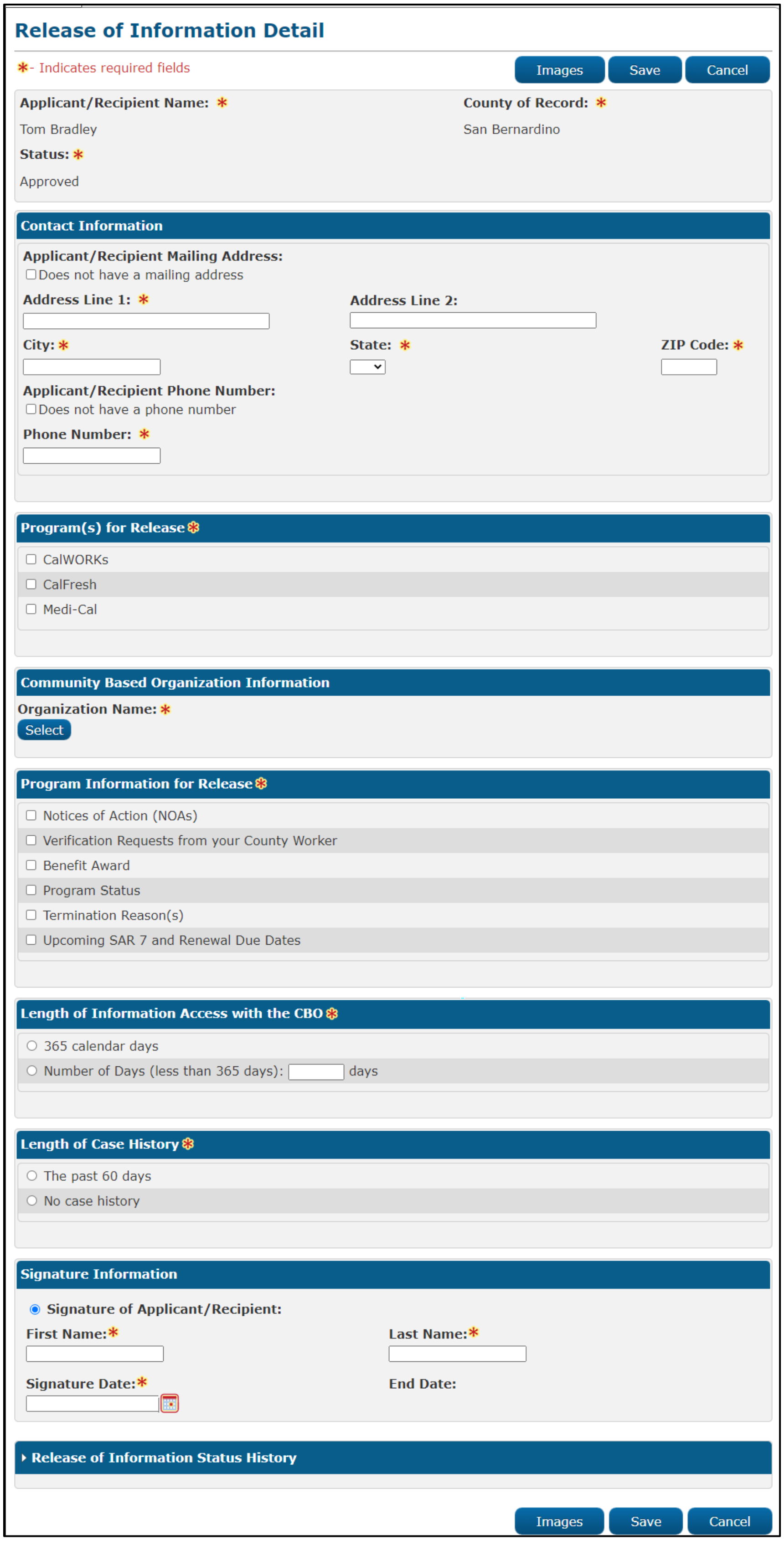
N/A

2.3 Release of Information Detail

2.3.1 Overview

The new Release of Information Detail Page will allow the worker to create, edit, and view a CBO ROI record. If the CBO ROI is initiated by a customer using their Self-Service Portal account, the page will only be available in edit and view mode. The worker can also access a scanned version of the CBO ROI form through the Images button on this page that is uploaded in the imaging solution.

2.3.2 Release of Information Detail – Mockups



Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Contact Information

Applicant/Recipient Mailing Address:

☐ Does not have a mailing address

Address Line 1: *

Address Line 2:

City: *

State: *

ZIP Code: *

Applicant/Recipient Phone Number:

☐ Does not have a phone number

Phone Number: *

Program(s) for Release *

☐ CalWORKs
☐ CalFresh
☐ Medi-Cal

Community Based Organization Information

Organization Name: *

Select

Program Information for Release *

☐ Notices of Action (NOAs)
☐ Verification Requests from your County Worker
☐ Benefit Award
☐ Program Status
☐ Termination Reason(s)
☐ Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO *

○ 365 calendar days
○ Number of Days (less than 365 days): ______ days

Length of Case History *

○ The past 60 days
○ No case history

Signature Information

◉ **Signature of Applicant/Recipient:**

First Name: *

Last Name: *

Signature Date: *

End Date:

▸ **Release of Information Status History**

Images | Save | Cancel

Figure 2.2.2-1 – Release of Information Detail Page – (Create Mode – Upon loading)

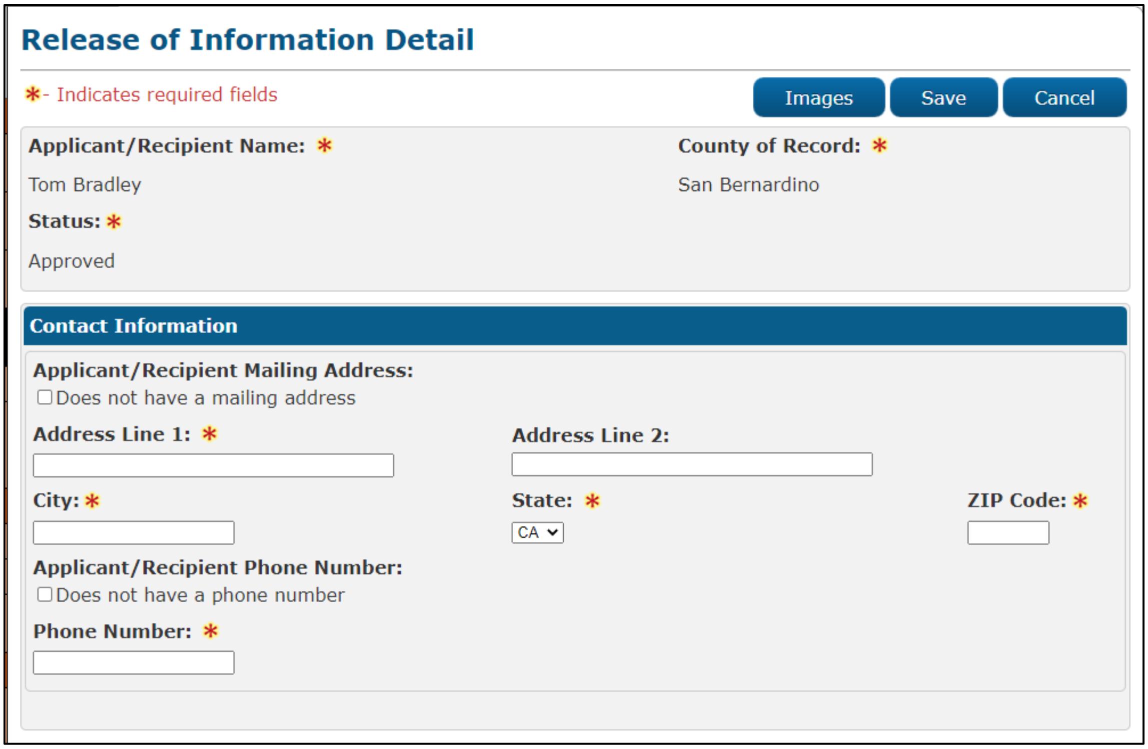


Figure 2.2.2-2 – Release of Information Detail Page – (Create Mode 1)

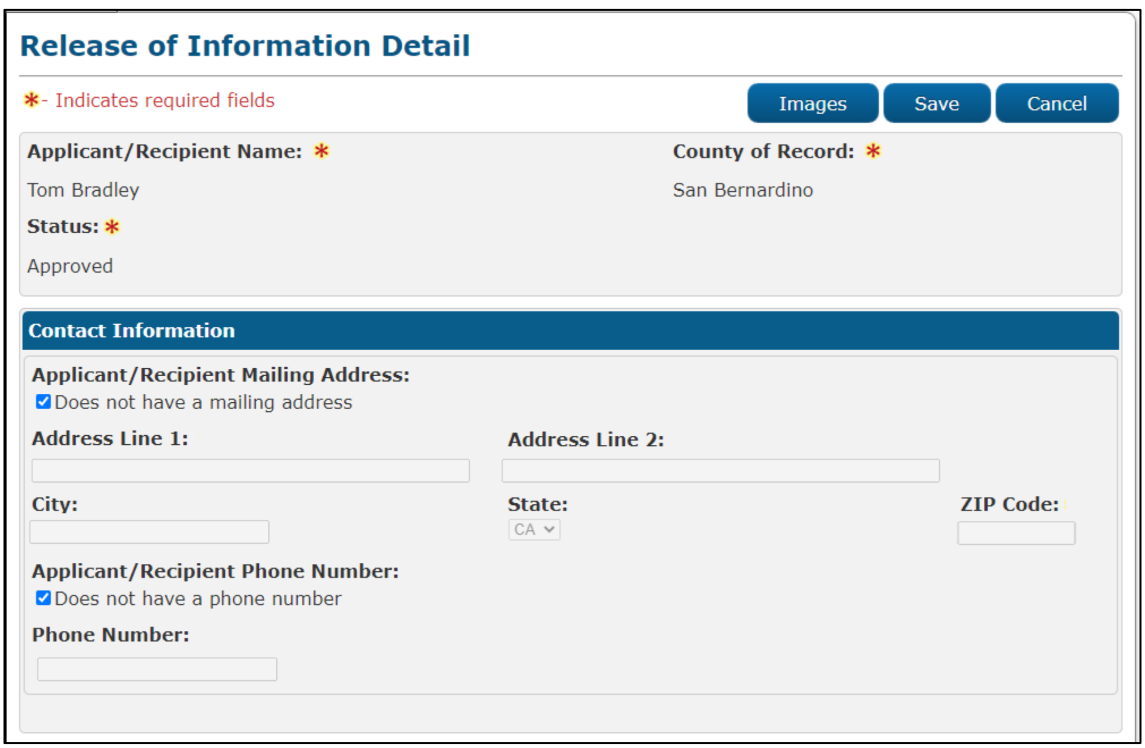


Figure 2.2.2-3 – Release of Information Detail Page – (Create Mode 1A)

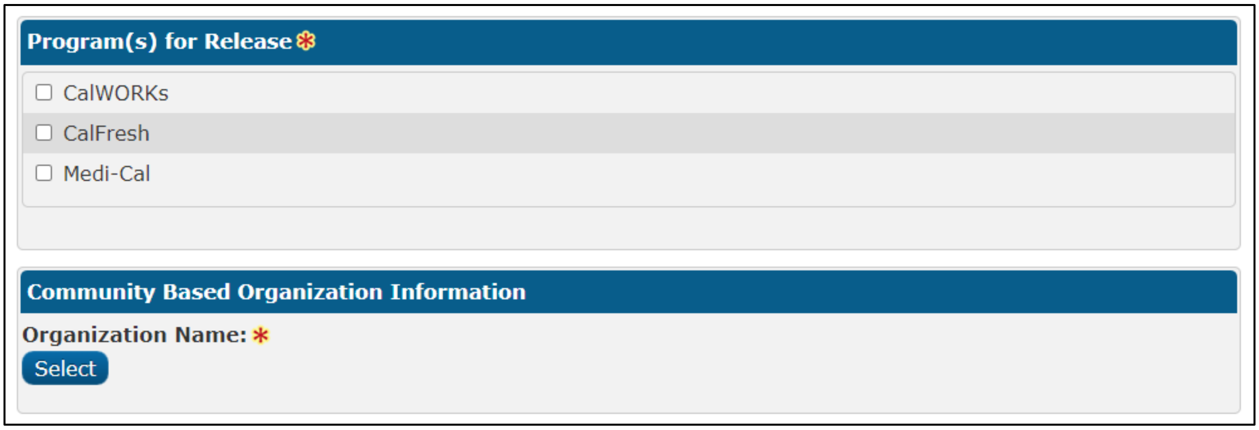


Figure 2.2.2-4 – Release of Information Detail Page – (Create Mode 2)

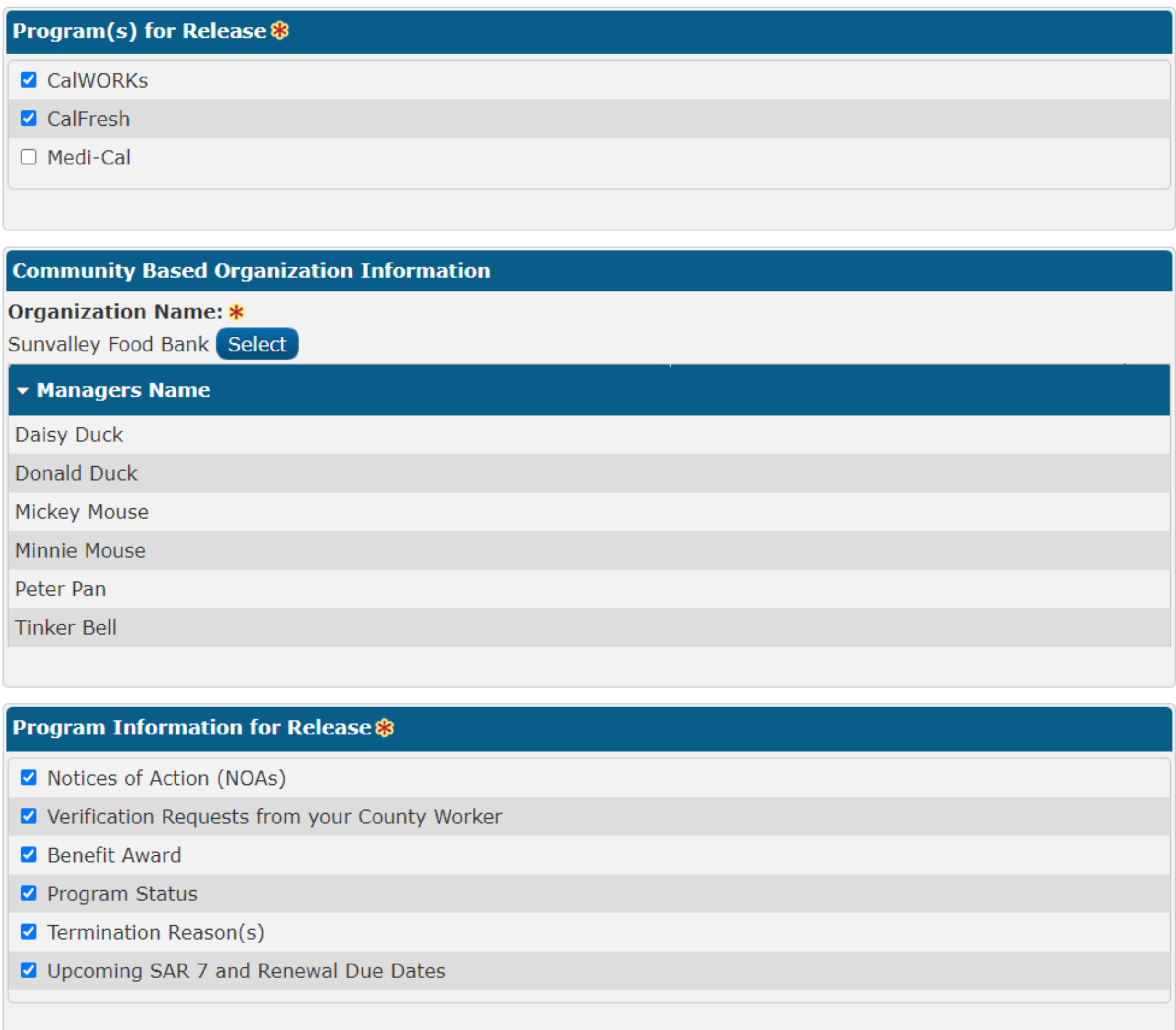


Figure 2.2.2-5 – Release of Information Detail Page – (Create Mode 2A)

Program(s) for Release *

- [x] CalWORKs
- [x] CalFresh
- [x] Medi-Cal

Community Based Organization Information

Organization Name: *
Sunvalley Food Bank Select

Medi-Cal CBO Managers/Assisters:
No

Managers Name

Daisy Duck
Donald Duck
Mickey Mouse
Minnie Mouse
Peter Pan
Tinker Bell

Medi-Cal Reason(s) for Sharing Information *

- [x] Assist in applying for and/or keeping public benefits
- [x] A specific case issue
- [x] At the request of the individual
- [x] Other:

Program Information for Release *

- [x] Notices of Action (NOAs)
- [x] Verification Requests from your County Worker
- [x] Benefit Award
- [x] Program Status
- [x] Termination Reason(s)
- [x] Upcoming SAR 7 and Renewal Due Dates

Figure 2.2.2-6 – Release of Information Detail Page – (Create Mode 2B)

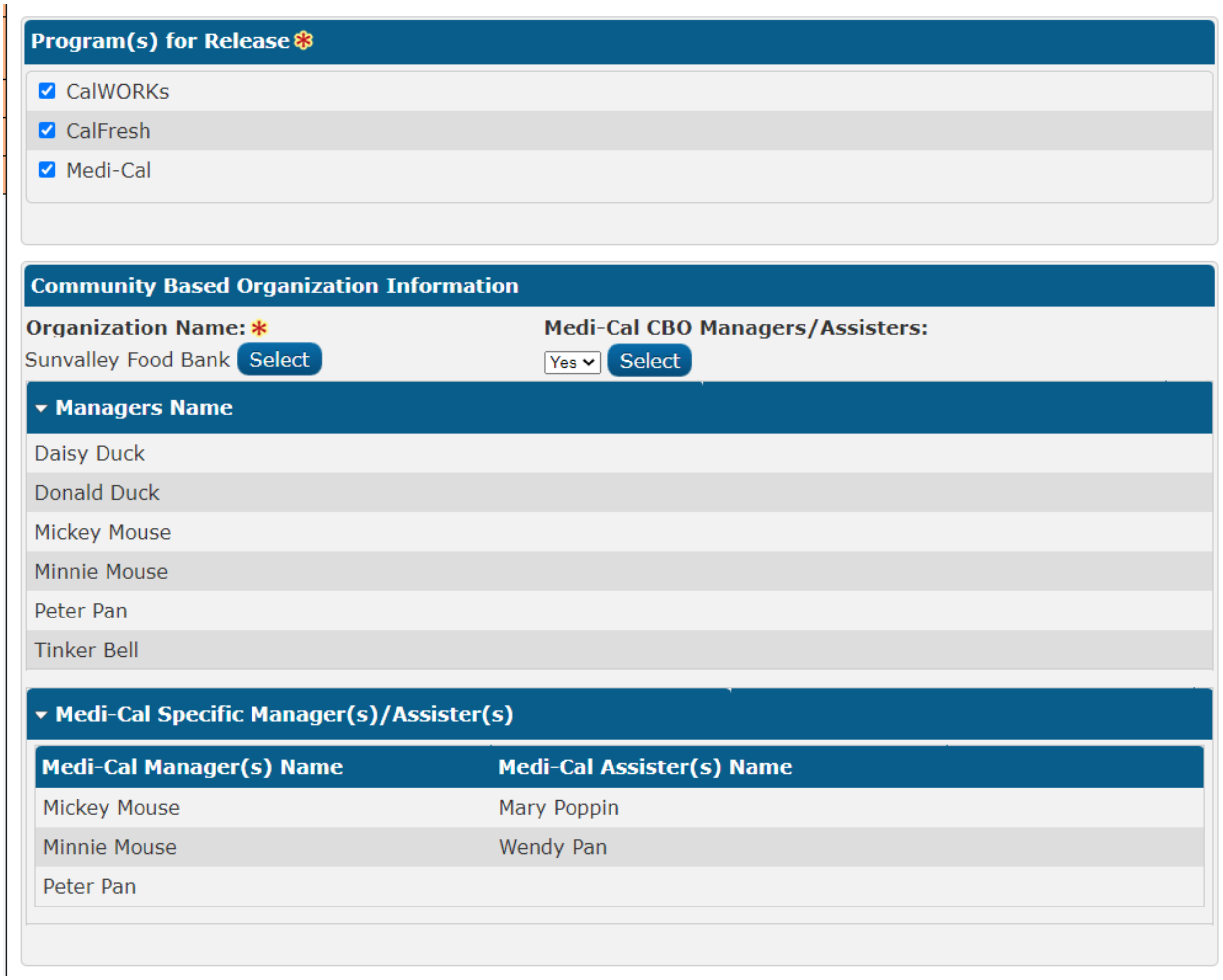


Figure 2.2.2-7 – Release of Information Detail Page – (Create Mode 2C)

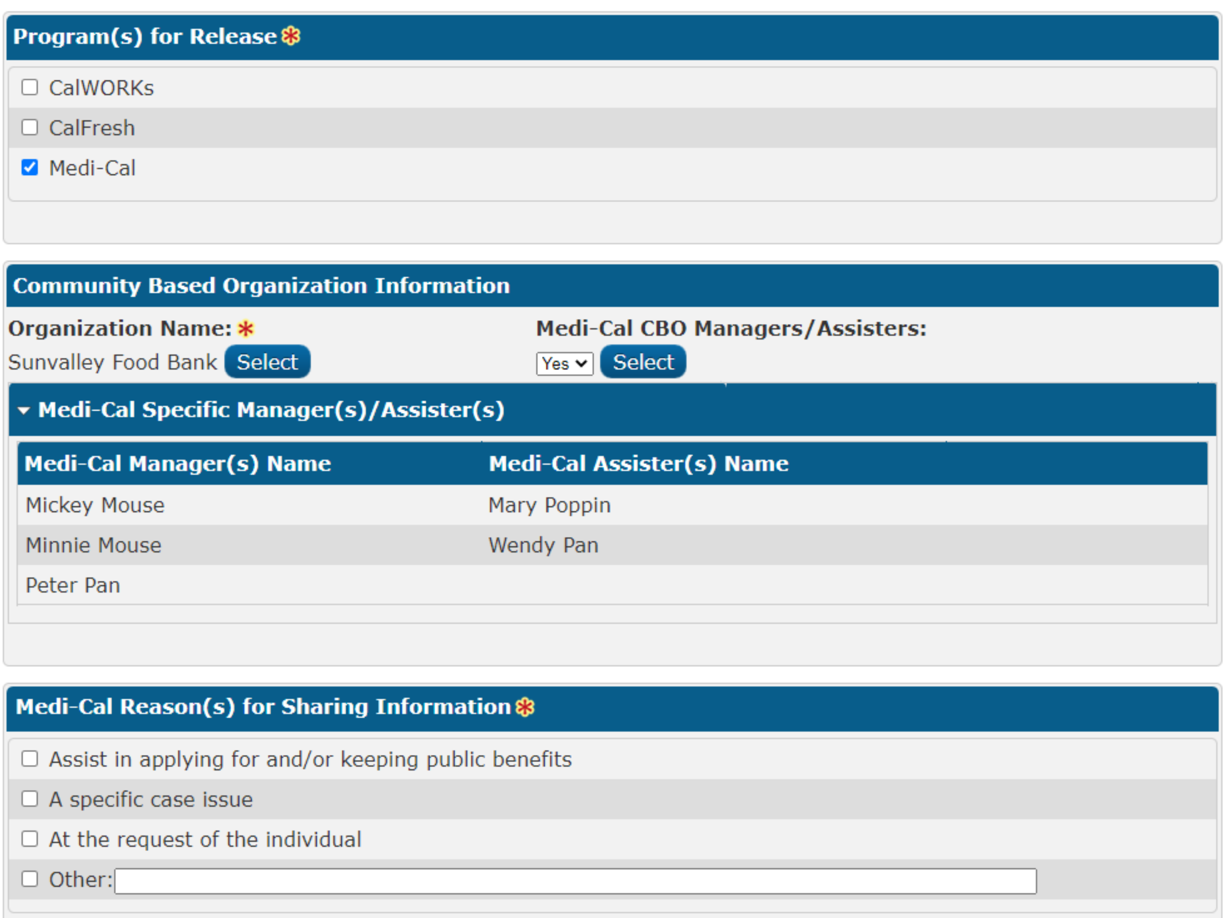


Figure 2.2.2-8 – Release of Information Detail Page – (Create Mode 2D)

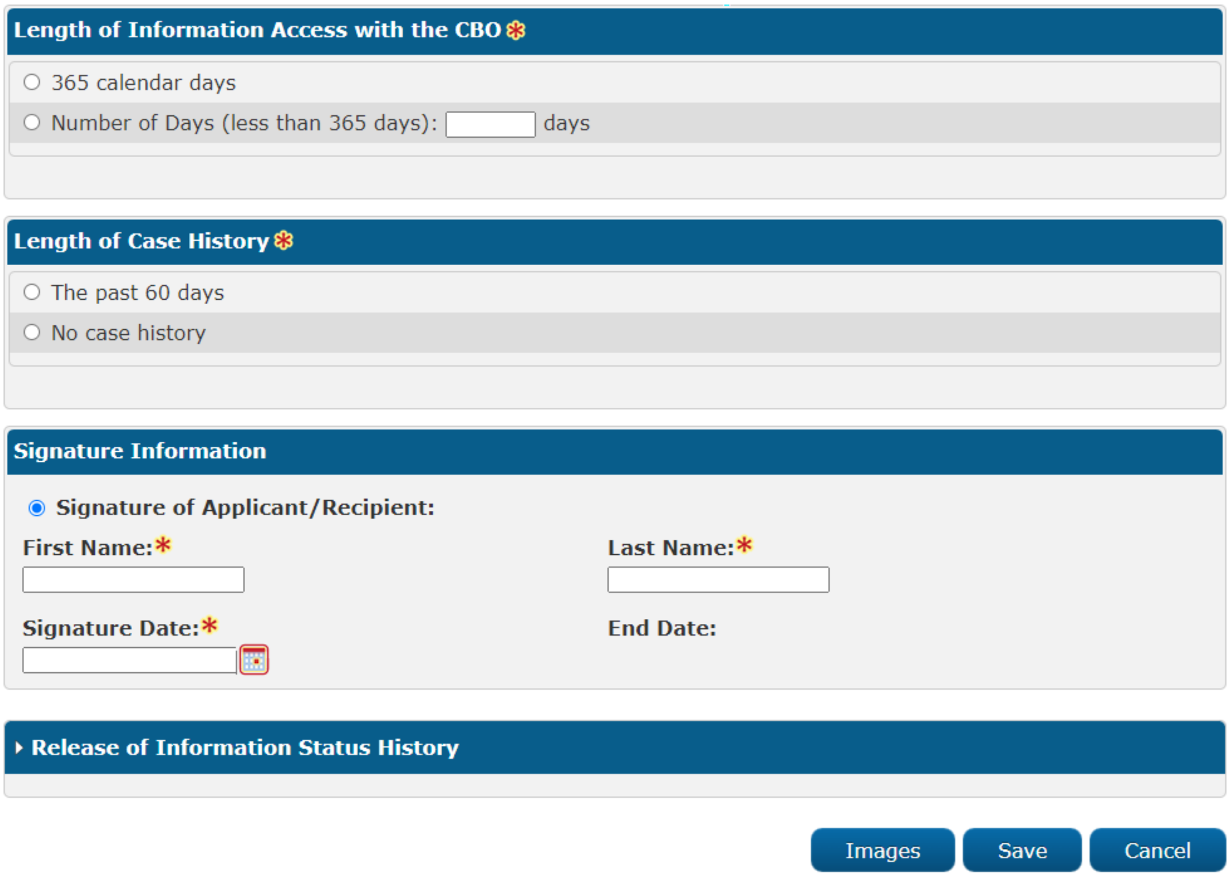


Figure 2.2.2-9 – Release of Information Detail Page – (Create Mode 3 CF program only)

Figure 2.2.2-10 – Release of Information Detail Page – (Create Mode 4_Signature Block when CW/MC selected)

~~Figure 2.2.2-11 – Release of Information Detail Page – (Create Mode 4A_Signature Block when CW/MC selected)~~

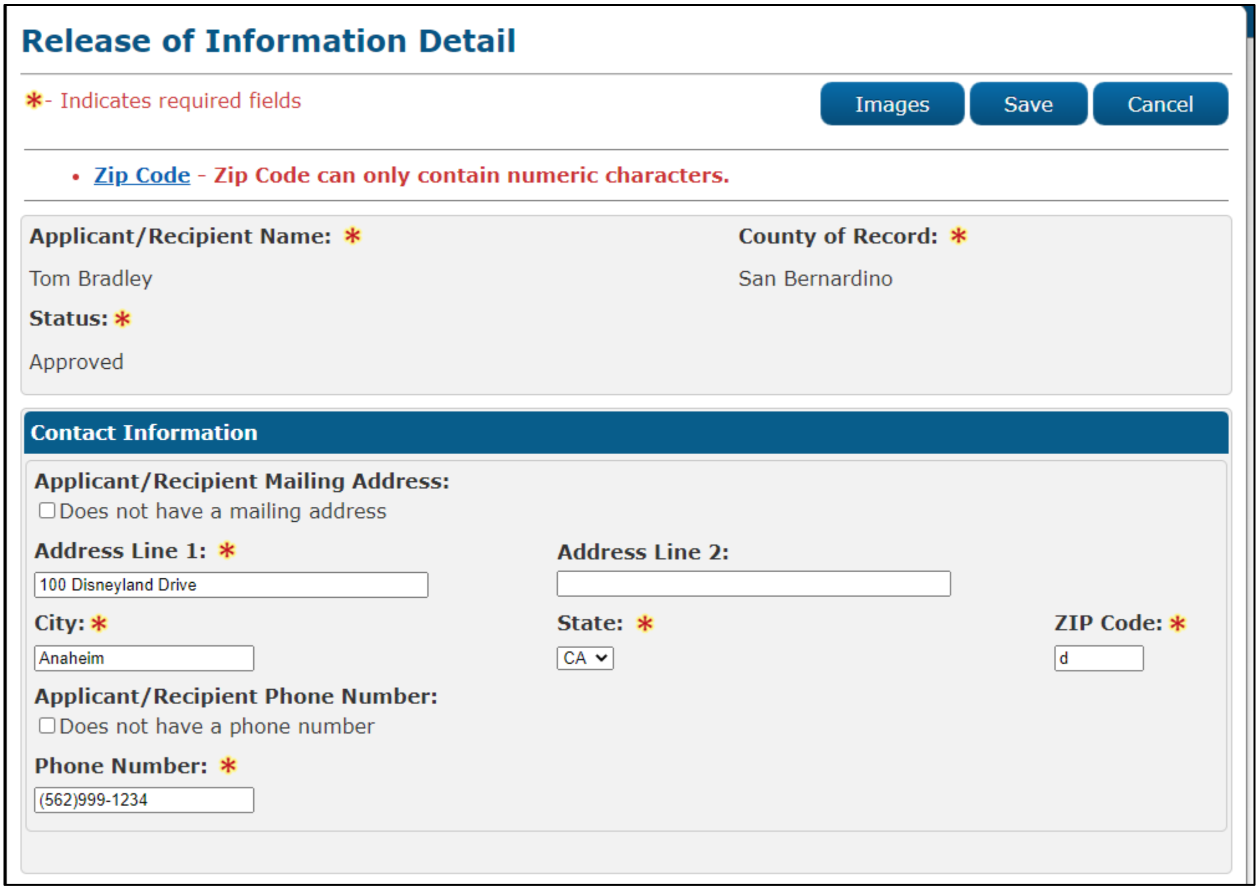


Figure 2.2.2-11~~2~~ – Release of Information Detail Page – (~~Create Mode~~ Validation1)

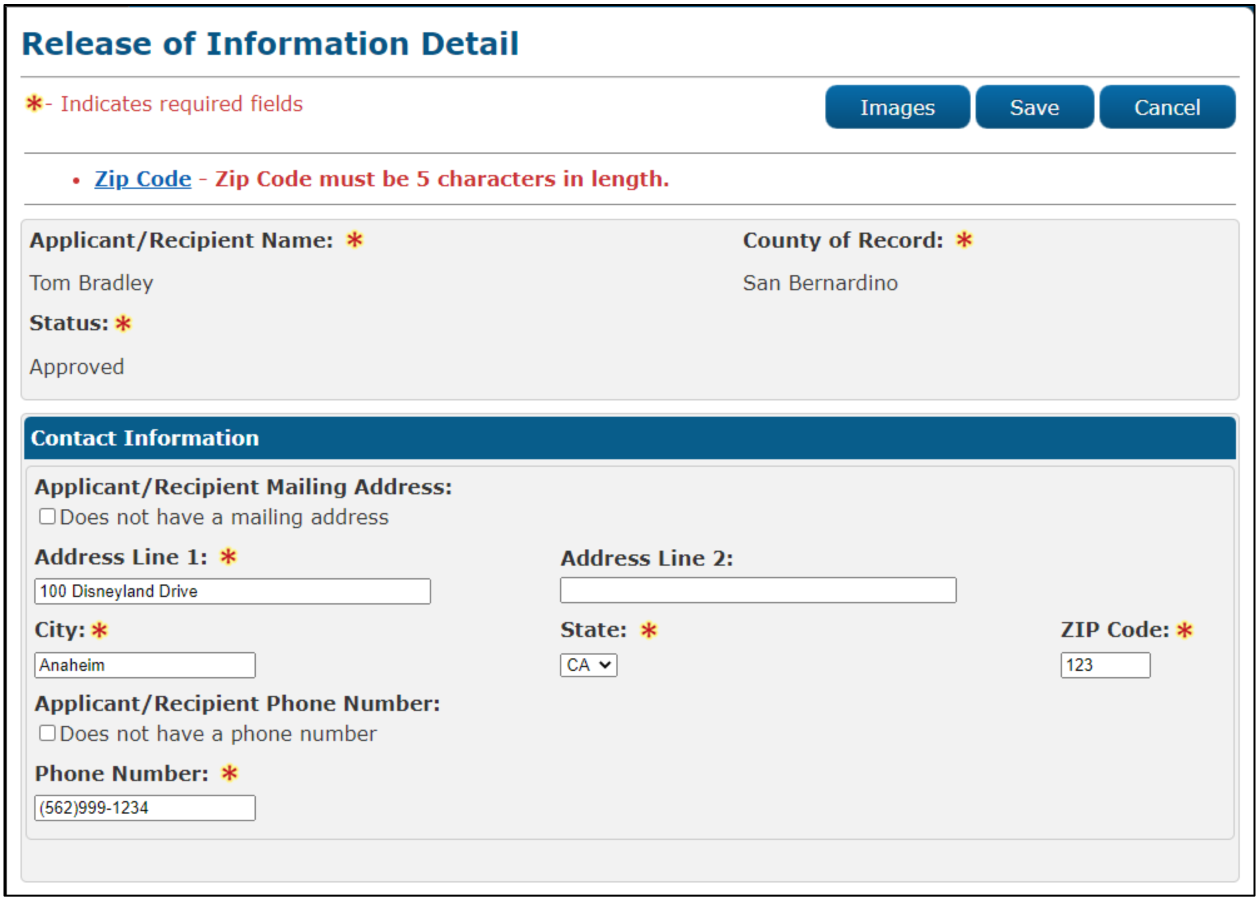


Figure 2.2.2-12~~3~~ – Release of Information Detail Page – (~~Create Mode~~ Validation2)

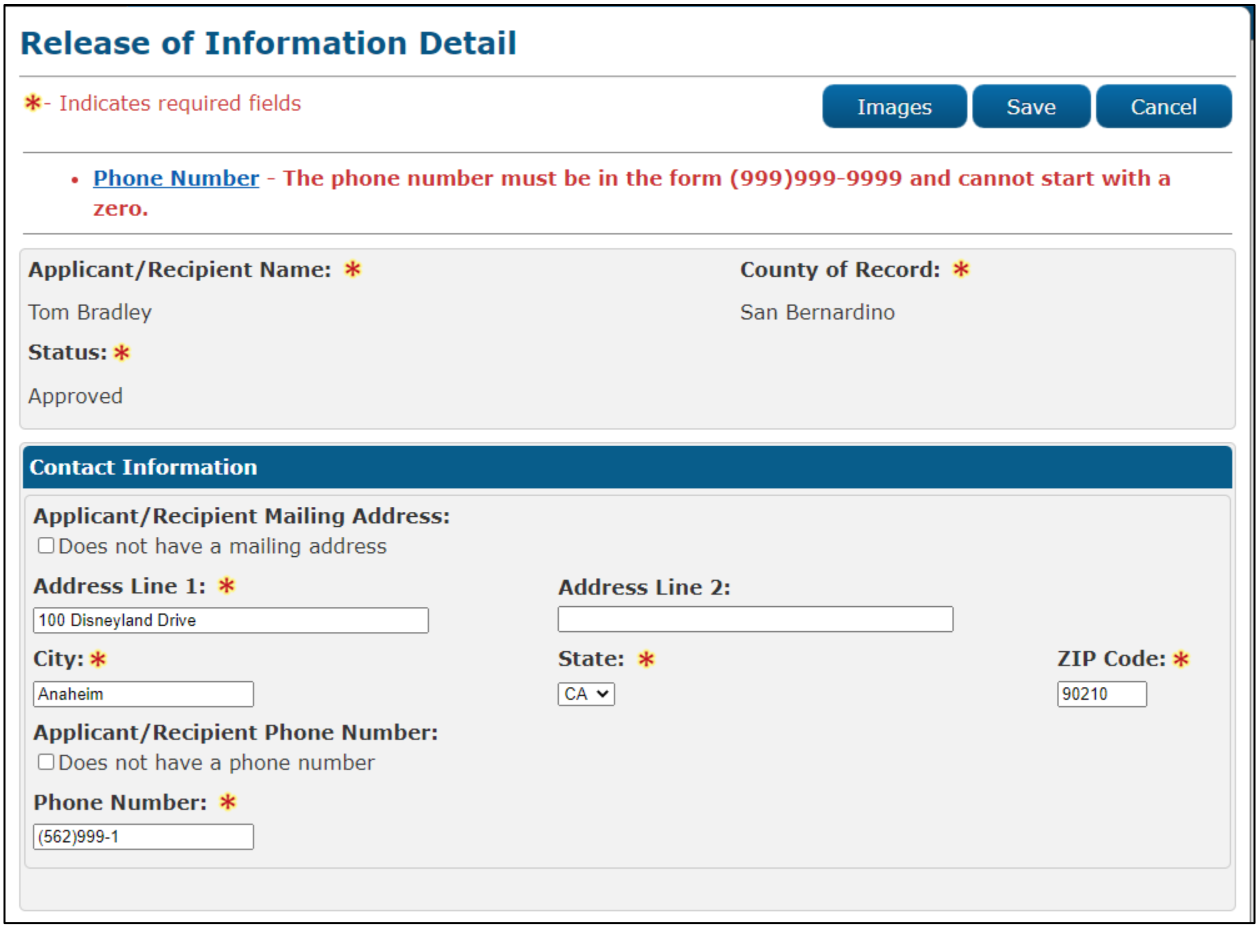


Figure 2.2.2-134 – Release of Information Detail Page – (~~Create Mode~~ Validation3)

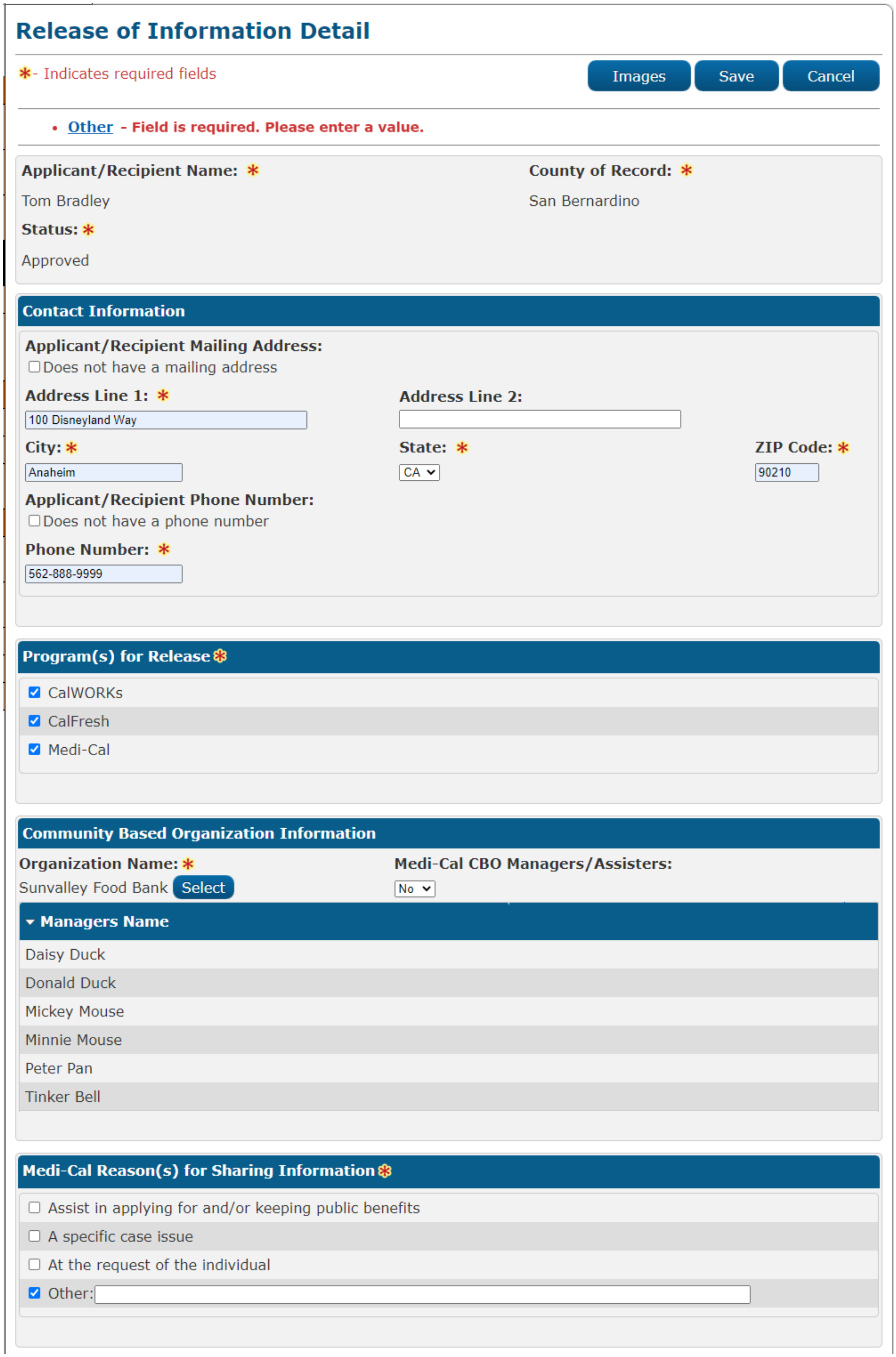


Figure 2.2.2-145 – Release of Information Detail Page – (~~Create Mode~~ Validation4)

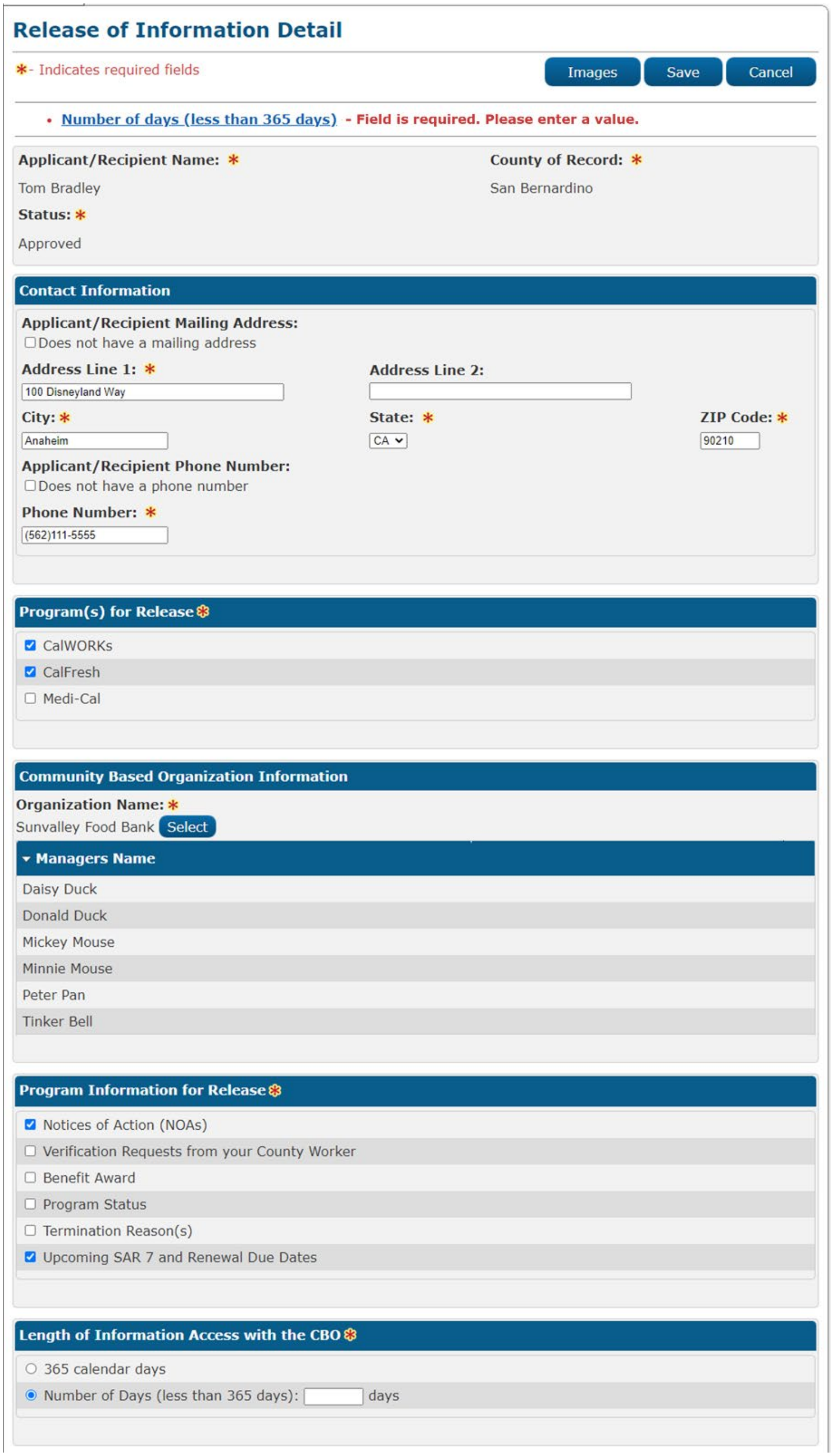
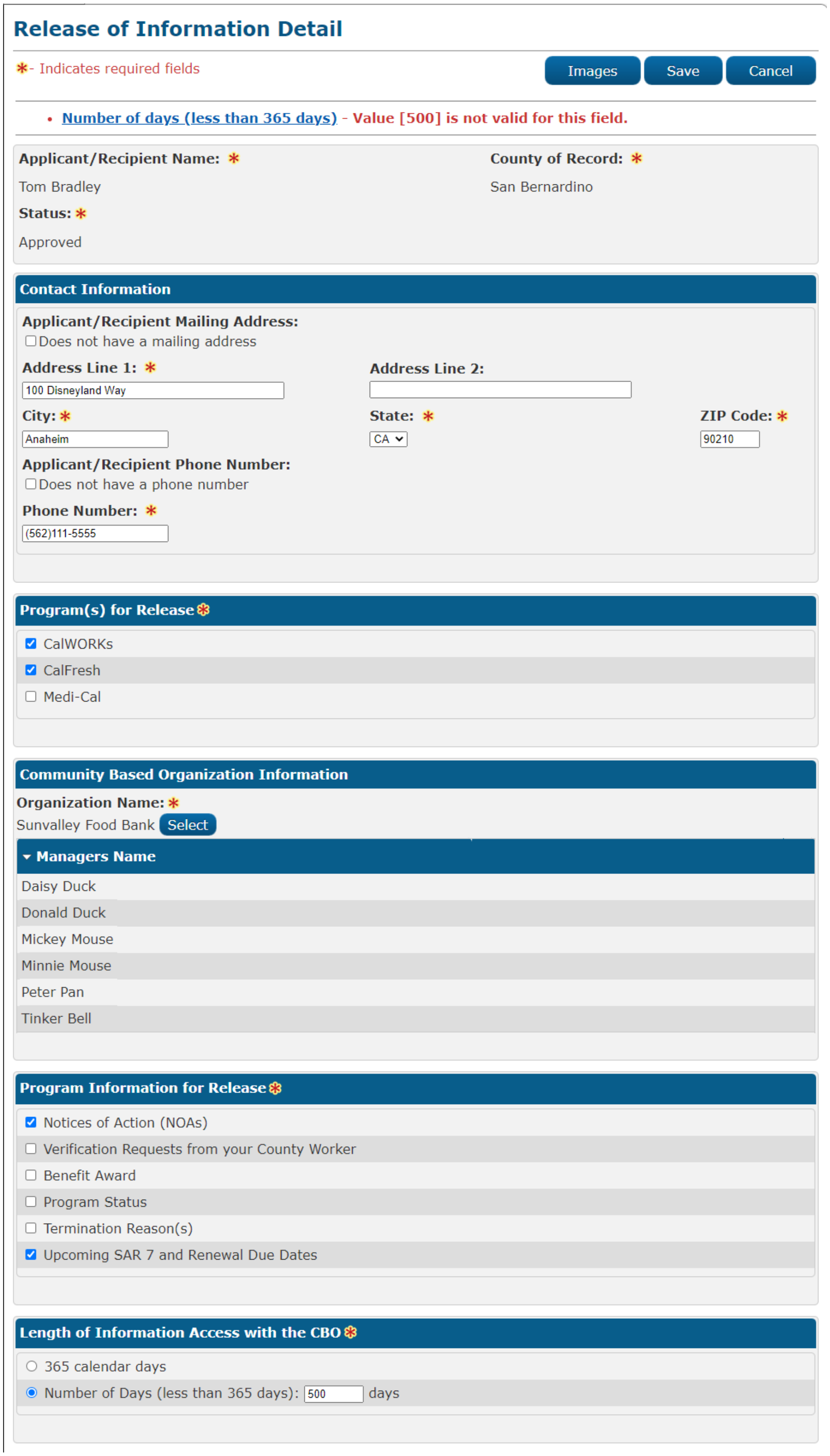


Figure 2.2.2-15~~6~~– Release of Information Detail Page – (~~Create Mode~~ Validation5)



Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Number of days (less than 365 days) - Value [500] is not valid for this field.

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Contact Information

Applicant/Recipient Mailing Address:

☐ Does not have a mailing address

Address Line 1: *

100 Disneyland Way

Address Line 2:

City: *

Anaheim

State: *

CA

ZIP Code: *

90210

Applicant/Recipient Phone Number:

☐ Does not have a phone number

Phone Number: *

(562)111-5555

Program(s) for Release *

☑ CalWORKs
☑ CalFresh
☐ Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank Select

Managers Name

Daisy Duck
Donald Duck
Mickey Mouse
Minnie Mouse
Peter Pan
Tinker Bell

Program Information for Release *

☑ Notices of Action (NOAs)
☐ Verification Requests from your County Worker
☐ Benefit Award
☐ Program Status
☐ Termination Reason(s)
☑ Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO *

○ 365 calendar days
◉ Number of Days (less than 365 days): 500 days

Figure 2.2.2-16 – Release of Information Detail Page – (~~Create Mode~~ Validation6)

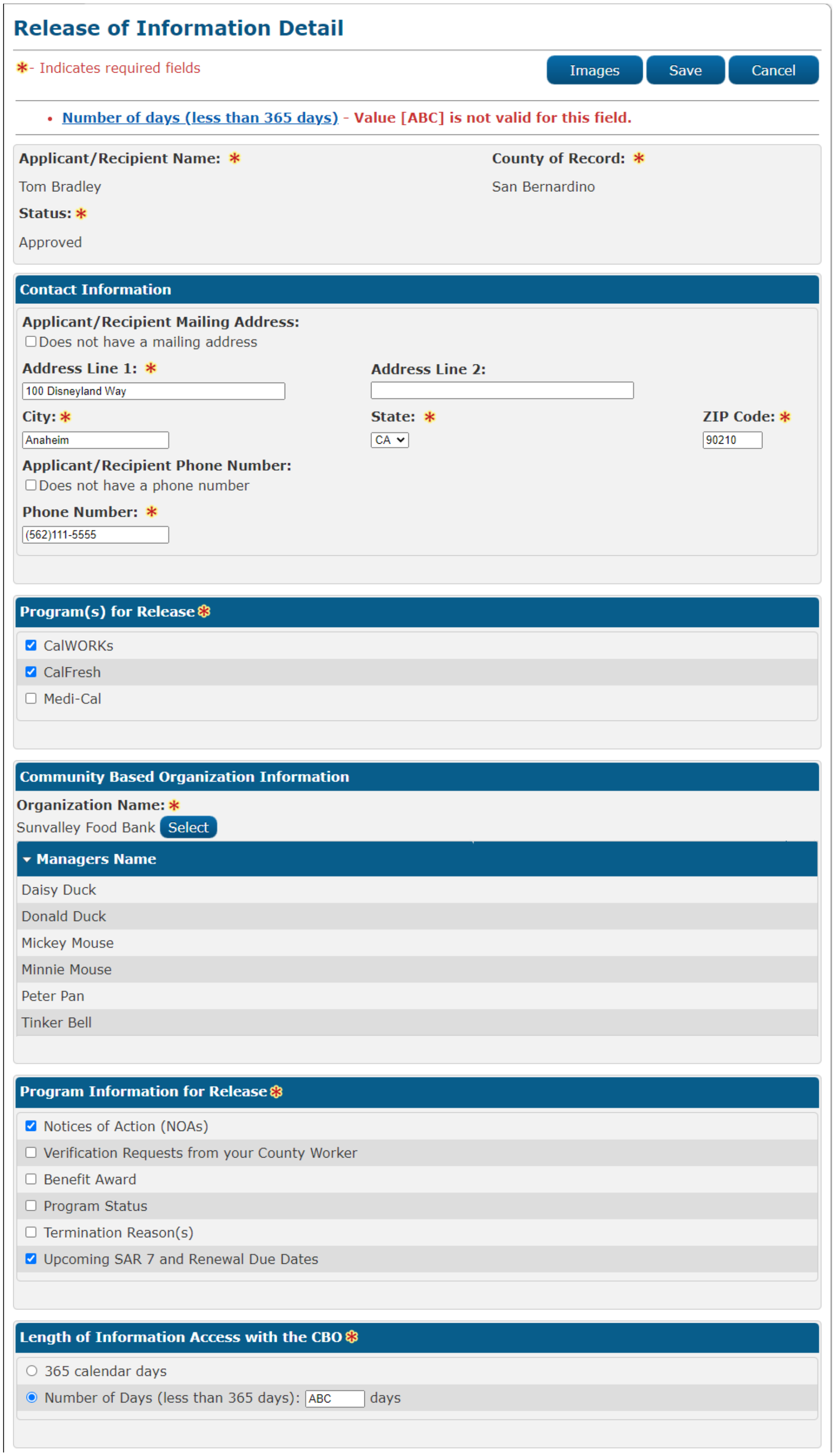


Figure 2.2.2-178 – Release of Information Detail Page – (~~Create Mode~~ Validation7)

Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Signature Date - Must be a valid calendar date and be in the format MM/DD/YYYY.

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Contact Information

Applicant/Recipient Mailing Address:

☐ Does not have a mailing address

Address Line 1: *

100 Disneyland Way

Address Line 2:

City: *

Anaheim

State: *

CA

ZIP Code: *

90210

Applicant/Recipient Phone Number:

☐ Does not have a phone number

Phone Number: *

562-888-9999

Program(s) for Release *

- ☑ CalWORKs
- ☑ CalFresh
- ☐ Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank Select

Managers Name

Daisy Duck

Donald Duck

Mickey Mouse

Minnie Mouse

Peter Pan

Tinker Bell

Program Information for Release *

- ☑ Notices of Action (NOAs)
- ☑ Verification Requests from your County Worker
- ☑ Benefit Award
- ☑ Program Status
- ☑ Termination Reason(s)
- ☑ Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO *

- ◉ 365 calendar days
- ○ Number of Days (less than 365 days): ______ days

Length of Case History *

- ◉ The past 60 days
- ○ No case history

Signature Information

◉ **Signature of Applicant/Recipient:**

First Name: *

Tom

Last Name: *

Bradley

Signature Date: *

99/55/99

End Date:

Figure 2.2.2-18~~9~~ – Release of Information Detail Page – (~~Create Mode~~ Validation8)

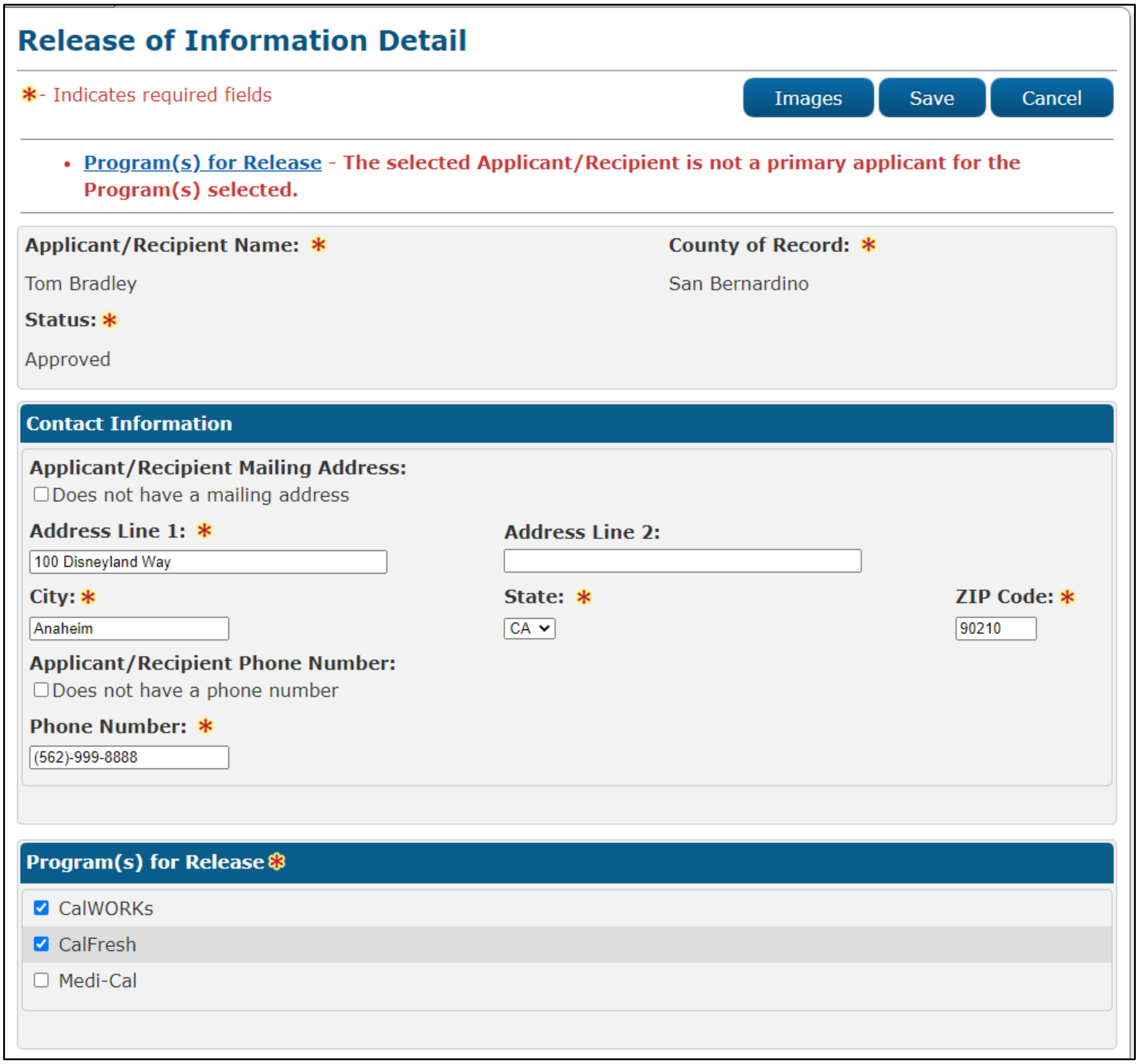


Figure 2.2.2-~~20~~ 19 – Release of Information Detail Page – (~~Create Mode~~ Validation9)

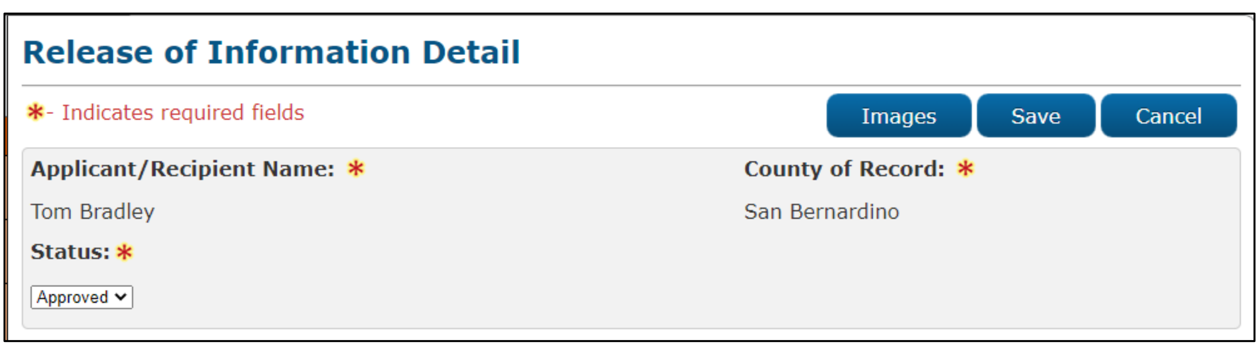


Figure 2.2.2-20~~1~~ – Release of Information Detail Page – (Edit Mode Approved)

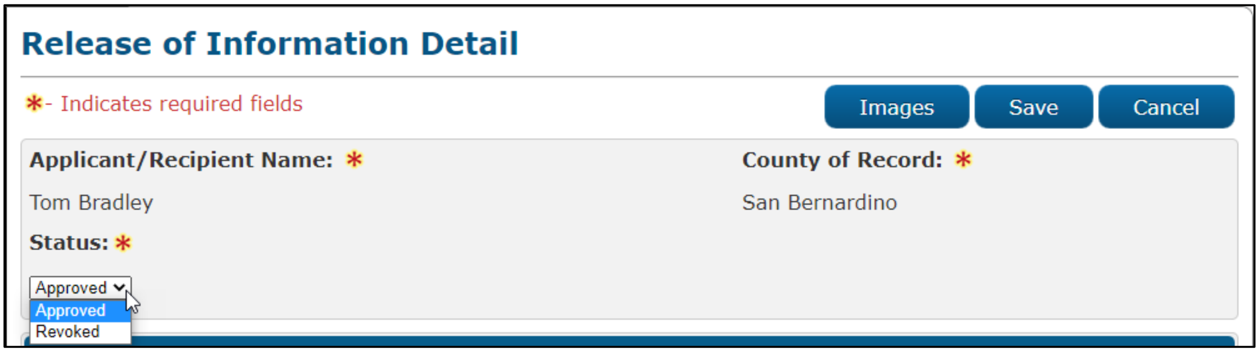


Figure 2.2.2-21~~2~~ – Release of Information Detail Page – (Edit Mode Approved 1)

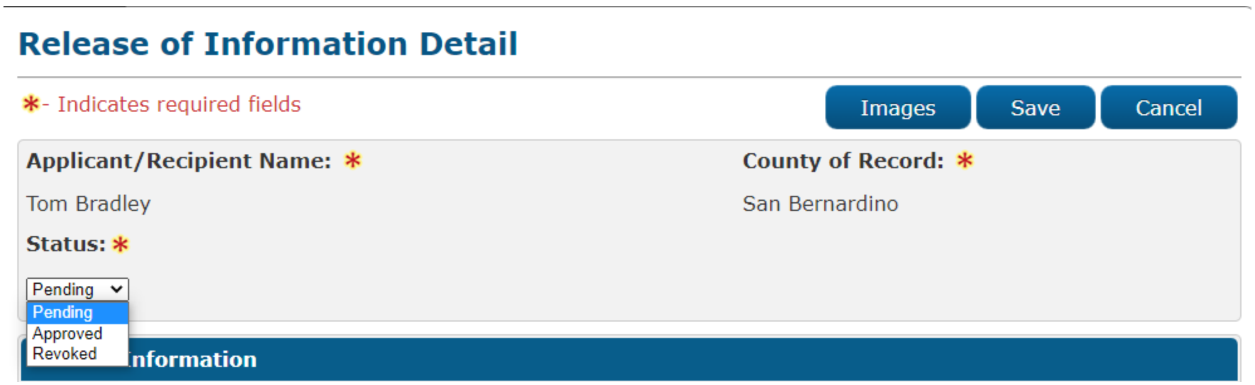


Figure 2.2.2-22 – Release of Information Detail Page – (Edit Mode Pending)

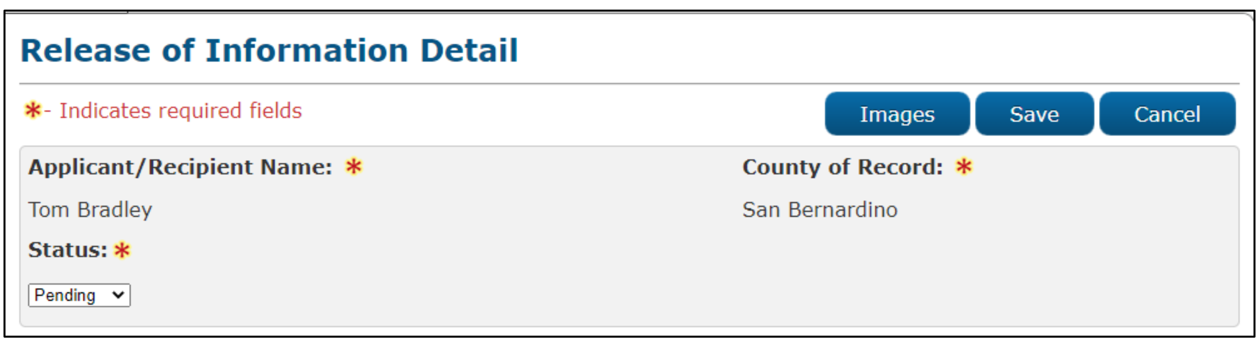


Figure 2.2.2-23 ~~24~~ – Release of Information Detail Page – (Edit Mode Pending 1)

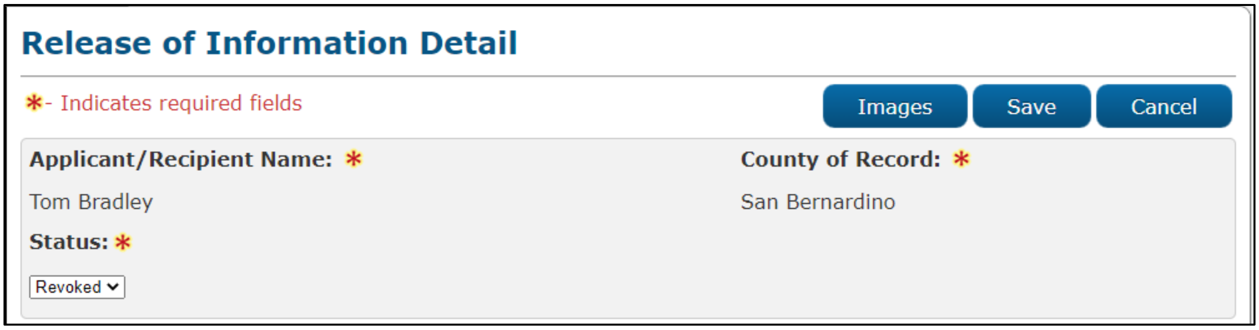


Figure 2.2.2-24~~5~~– Release of Information Detail Page – (Edit Mode Revoked)

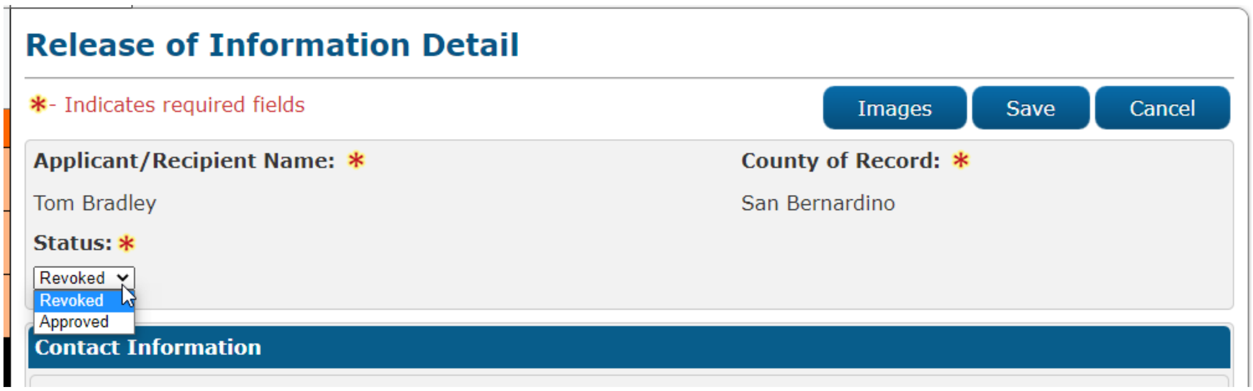


Figure 2.2.2-25 – Release of Information Detail Page – (Edit Mode Revoked 1)

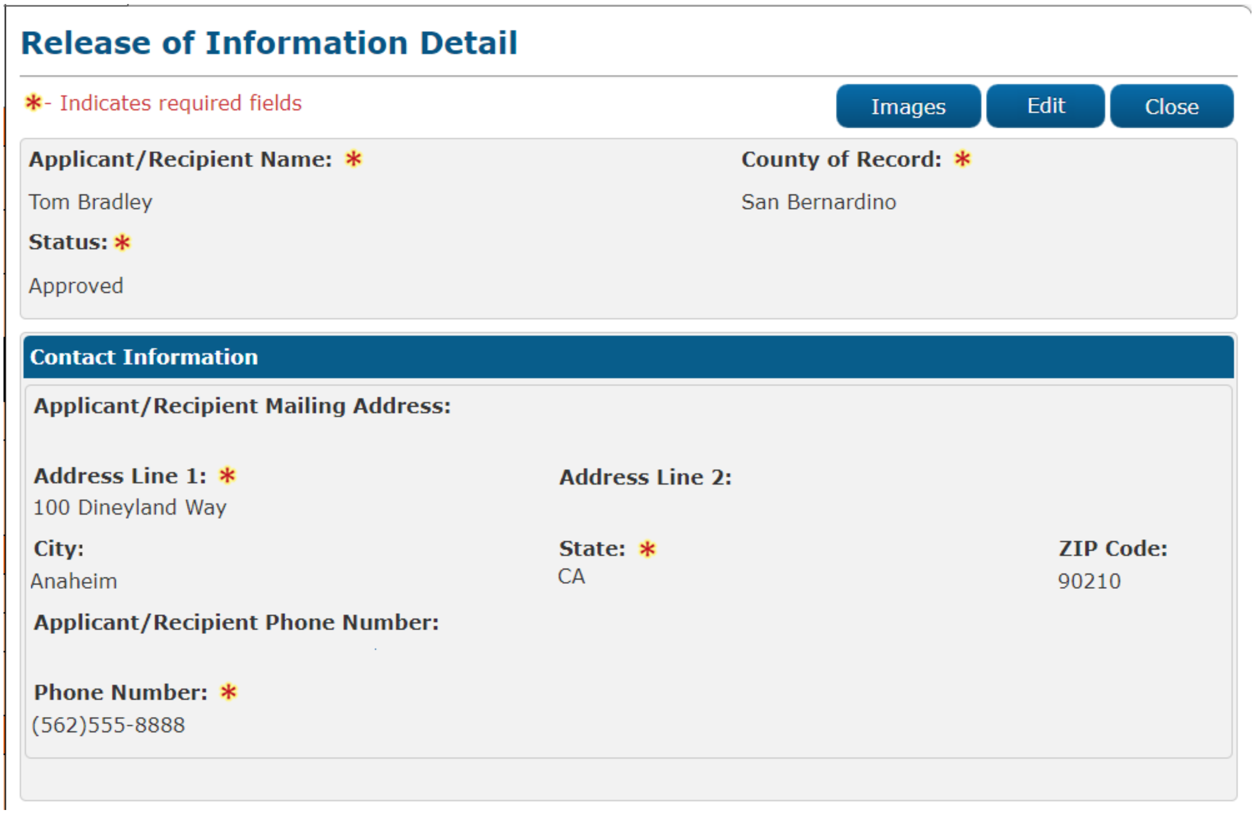


Figure 2.2.2-26~~7~~ – Release of Information Detail Page – (View Mode)

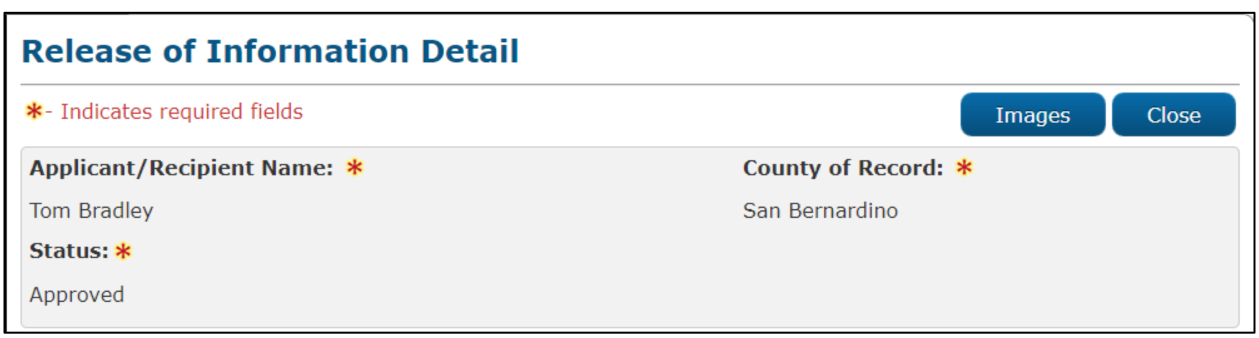
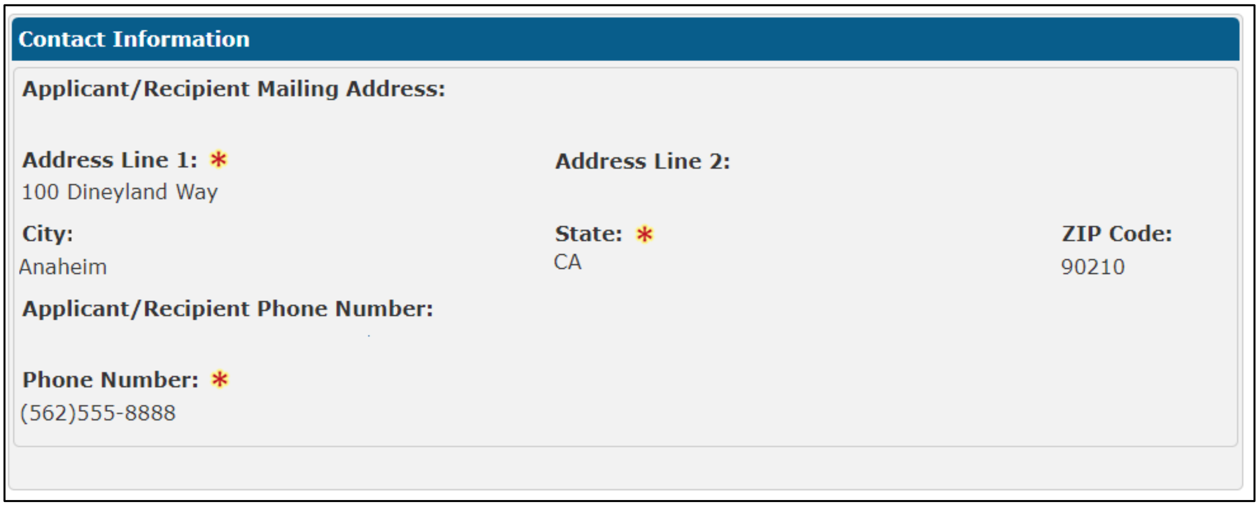


Figure 2.2.2-27 – Release of Information Detail Page – (View Mode – With no ReleaseofInformationEdit Security Right)

Figure 2.2.2-28 – Release of Information Detail Page – (View~~/Edit~~ Mode-Contact)


Contact Information

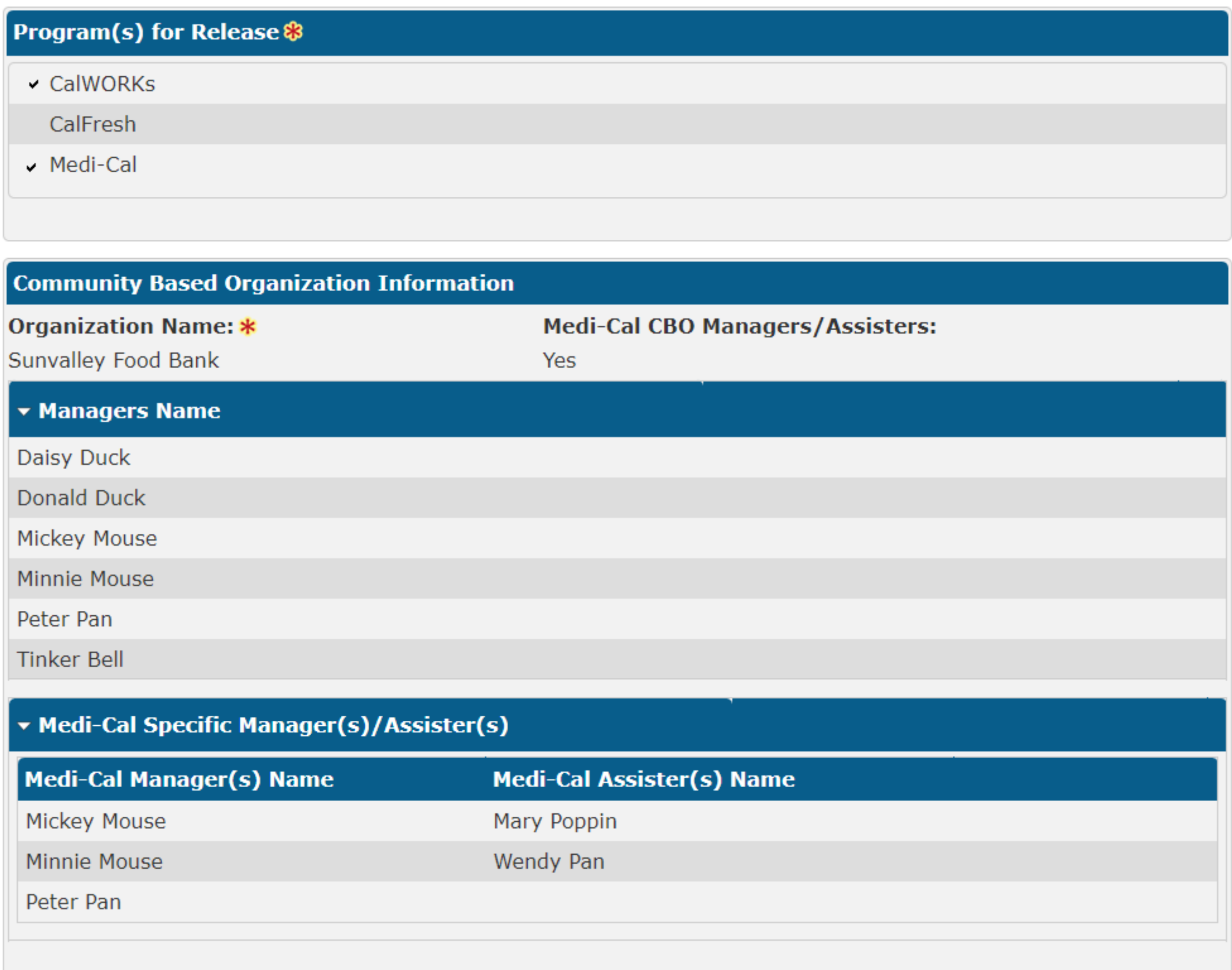
Applicant/Recipient Mailing Address:

Address Line 1: *	Address Line 2:	
100 Dineyland Way		
City:	State: *	ZIP Code:
Anaheim	CA	90210

Applicant/Recipient Phone Number:

Phone Number: *
(562)555-8888

Figure 2.2.2-29 – Release of Information Detail Page – (View~~/Edit~~ Mode-Contact 1)


Program(s) for Release *

- ✔ CalWORKs
- CalFresh
- ✔ Medi-Cal

Community Based Organization Information

Organization Name: *	Medi-Cal CBO Managers/Assisters:
Sunvalley Food Bank	Yes

Managers Name

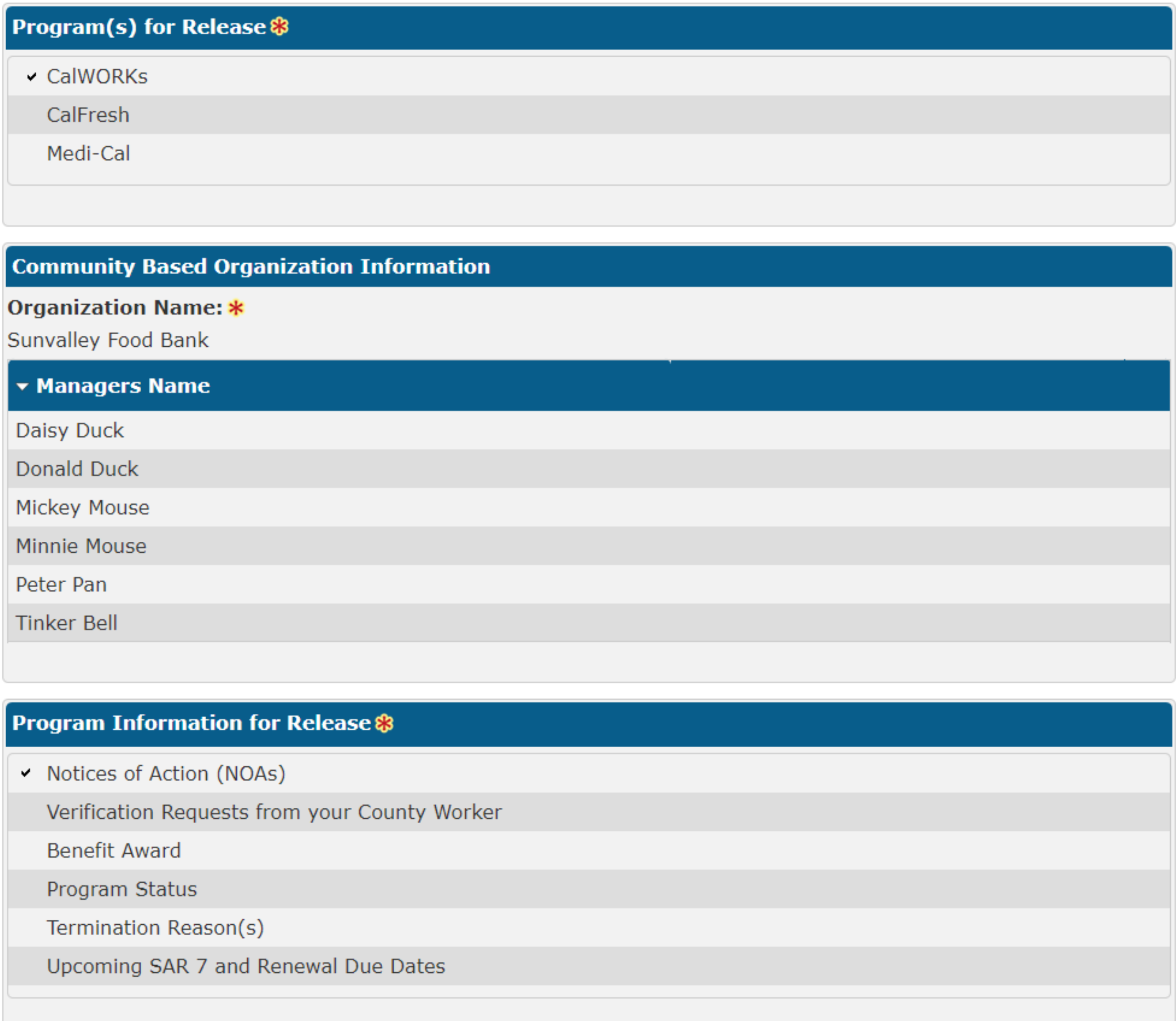
- Daisy Duck
- Donald Duck
- Mickey Mouse
- Minnie Mouse
- Peter Pan
- Tinker Bell

Medi-Cal Specific Manager(s)/Assister(s)

Medi-Cal Manager(s) Name	Medi-Cal Assister(s) Name
Mickey Mouse	Mary Poppin
Minnie Mouse	Wendy Pan
Peter Pan	

Figure 2.2.2-30 – Release of Information Detail Page – (View/~~Edit~~ Mode)

Figure 2.2.2-31 – Release of Information Detail Page – (View/~~Edit~~ Mode-1)



Program(s) for Release *

- ✓ CalWORKs
- CalFresh
- Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank

Managers Name

- Daisy Duck
- Donald Duck
- Mickey Mouse
- Minnie Mouse
- Peter Pan
- Tinker Bell

Program Information for Release *

- ✓ Notices of Action (NOAs)
- Verification Requests from your County Worker
- Benefit Award
- Program Status
- Termination Reason(s)
- Upcoming SAR 7 and Renewal Due Dates

Figure 2.2.2-32 – Release of Information Detail Page – (View~~/Edit~~ Mode-2)

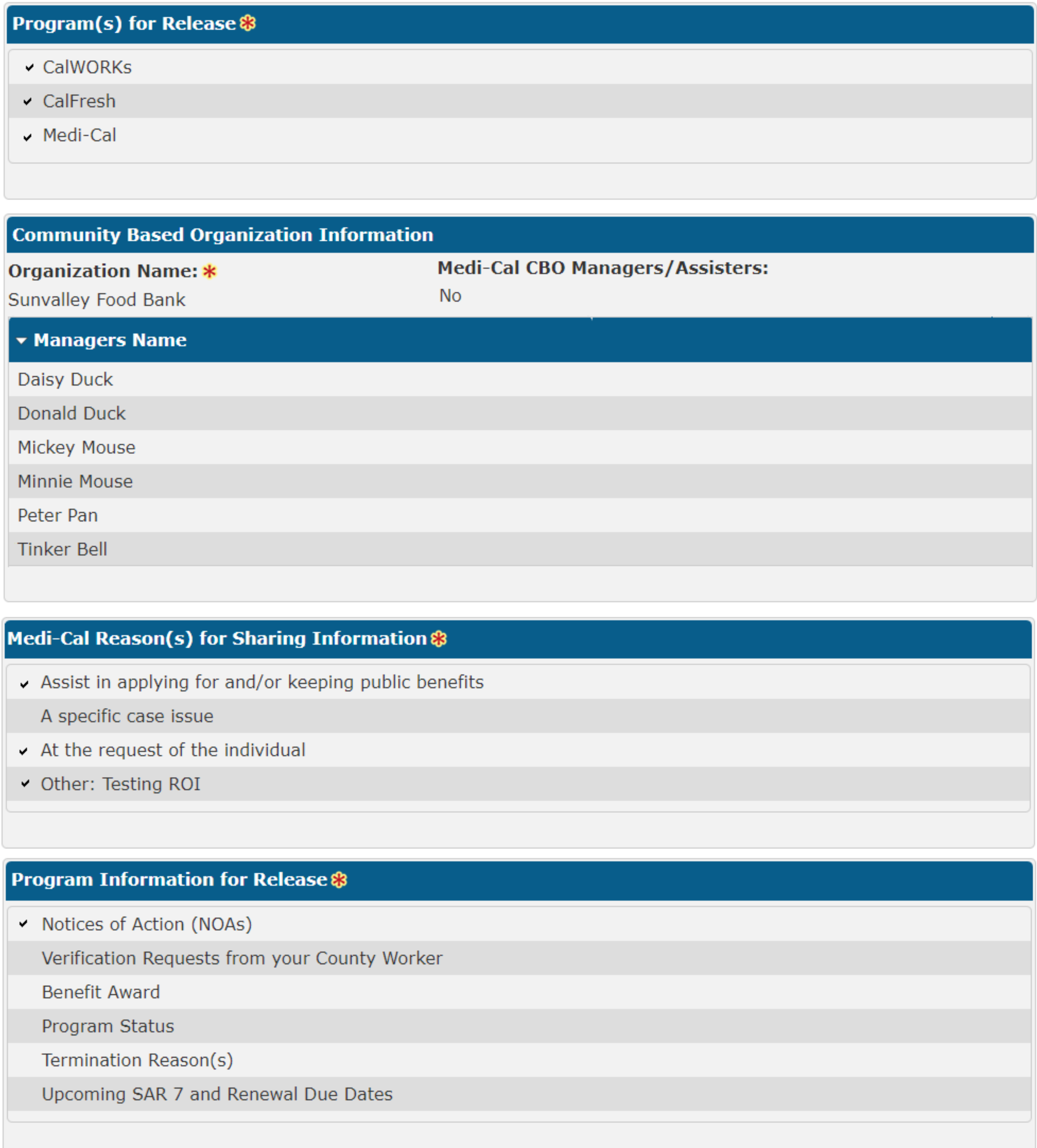


Figure 2.2.2-33 – Release of Information Detail Page – (View~~/Edit~~ Mode-3)

Length of Information Access with the CBO *

365 calendar days

Length of Case History *

The past 60 days

Figure 2.2.2-34 – Release of Information Detail Page – (View~~/Edit~~ Mode-4)

Signature Information

Signature of Applicant/Recipient:

First Name: * Tom

Last Name: * Bradley

Signature Date: * 01/31/2023

End Date: 01/31/2024

Figure 2.2.2-35 – Release of Information Detail Page – (View~~/Edit~~ Mode-Signature Information of Applicant/Recipient or when CF only)

Signature Information

Signature of Parent/Guardian:

First Name: * Tom

Last Name: * Bradley

Signature Date: * 01/31/2023

End Date: 01/31/2024

Figure 2.2.2-36 – Release of Information Detail Page – (View~~/Edit~~ Mode-Signature Information of Parent/Guardian)

Release of Information Status History

Status	Updated On	Updated By
Revoked	02/01/2023	1234867
Approved	01/30/2023	1234867
Pending	01/15/2023	1114781

Figure 2.2.2-37 – Release of Information Detail Page – (View/Edit Mode-Release of Information -1)

Release of Information Status History

Status	Updated On	Updated By
Revoked	02/01/2023	1234867
Approved	01/30/2023	1234867

Figure 2.2.2-38 – Release of Information Detail Page – (View/Edit Mode-Release of Information -2)

Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

Applicant/Recipient Name: *
Tom Bradley

County of Record: *
San Bernardino

Status: *
Revoked

Contact Information

Applicant/Recipient Mailing Address:
☐ Does not have a mailing address

Address Line 1: * 100 Disneyland Way

Address Line 2:

City: * Anaheim

State: * CA

ZIP Code: * 90210

Applicant/Recipient Phone Number:
☐ Does not have a phone number

Phone Number: * 562-888-9999

Program(s) for Release *

☑ CalWORKs
☑ CalFresh
☑ Medi-Cal

Community Based Organization Information

Organization Name: *
Sunvalley Food Bank Select

Medi-Cal CBO Managers/Assisters:
Yes Select

Managers Name
Daisy Duck
Donald Duck
Mickey Mouse
Minnie Mouse
Peter Pan
Tinker Bell

Medi-Cal Specific Manager(s)/Assister(s)

Medi-Cal Manager(s) Name	Medi-Cal Assister(s) Name
Mickey Mouse	Mary Poppin
Minnie Mouse	Wendy Pan
Peter Pan	

Medi-Cal Reason(s) for Sharing Information *

☑ Assist in applying for and/or keeping public benefits
☑ A specific case issue
☐ At the request of the individual
☐ Other:

Program Information for Release *

☑ Notices of Action (NOAs)
☑ Verification Requests from your County Worker
☑ Benefit Award
☑ Program Status
☑ Termination Reason(s)
☑ Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO *

◉ 365 calendar days
○ Number of Days (less than 365 days): ____ days

Length of Case History *

◉ The past 60 days
○ No case history

Signature Information

◉ **Signature of Applicant/Recipient:**
○ **Signature of Parent/Guardian:**

First Name: * Bernaer

Last Name: * Fallon

Signature Date: * 01/30/2023

End Date:
01/30/2024

Release of Information Status History

Status	Updated On	Updated By
Revoked	02/01/2023	1234867
Approved	01/30/2023	1234867

Images | Save | Cancel

Figure 2.2.2-39 – Release of Information Detail Page – (Edit Mode-Release of Information)

Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Revoked

Contact Information

Applicant/Recipient Mailing Address:

☐ Does not have a mailing address

Address Line 1: *

100 Disneyland Way

Address Line 2:

City: *

Anaheim

State: *

CA

ZIP Code: *

90210

Applicant/Recipient Phone Number:

☐ Does not have a phone number

Phone Number: *

562-888-9999

Program(s) for Release *

☑ CalWORKs

☑ CalFresh

☑ Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank Select

Medi-Cal CBO Managers/Assisters:

Yes Select

Managers Name
Daisy Duck
Donald Duck
Mickey Mouse
Minnie Mouse
Peter Pan
Tinker Bell

Medi-Cal Specific Manager(s)/Assister(s)

Medi-Cal Manager(s) Name	Medi-Cal Assister(s) Name
Mickey Mouse	Mary Poppin
Minnie Mouse	Wendy Pan
Peter Pan	

Medi-Cal Reason(s) for Sharing Information *

☑ Assist in applying for and/or keeping public benefits

☑ A specific case issue

☐ At the request of the individual

☐ Other:

Program Information for Release *

☑ Notices of Action (NOAs)

☑ Verification Requests from your County Worker

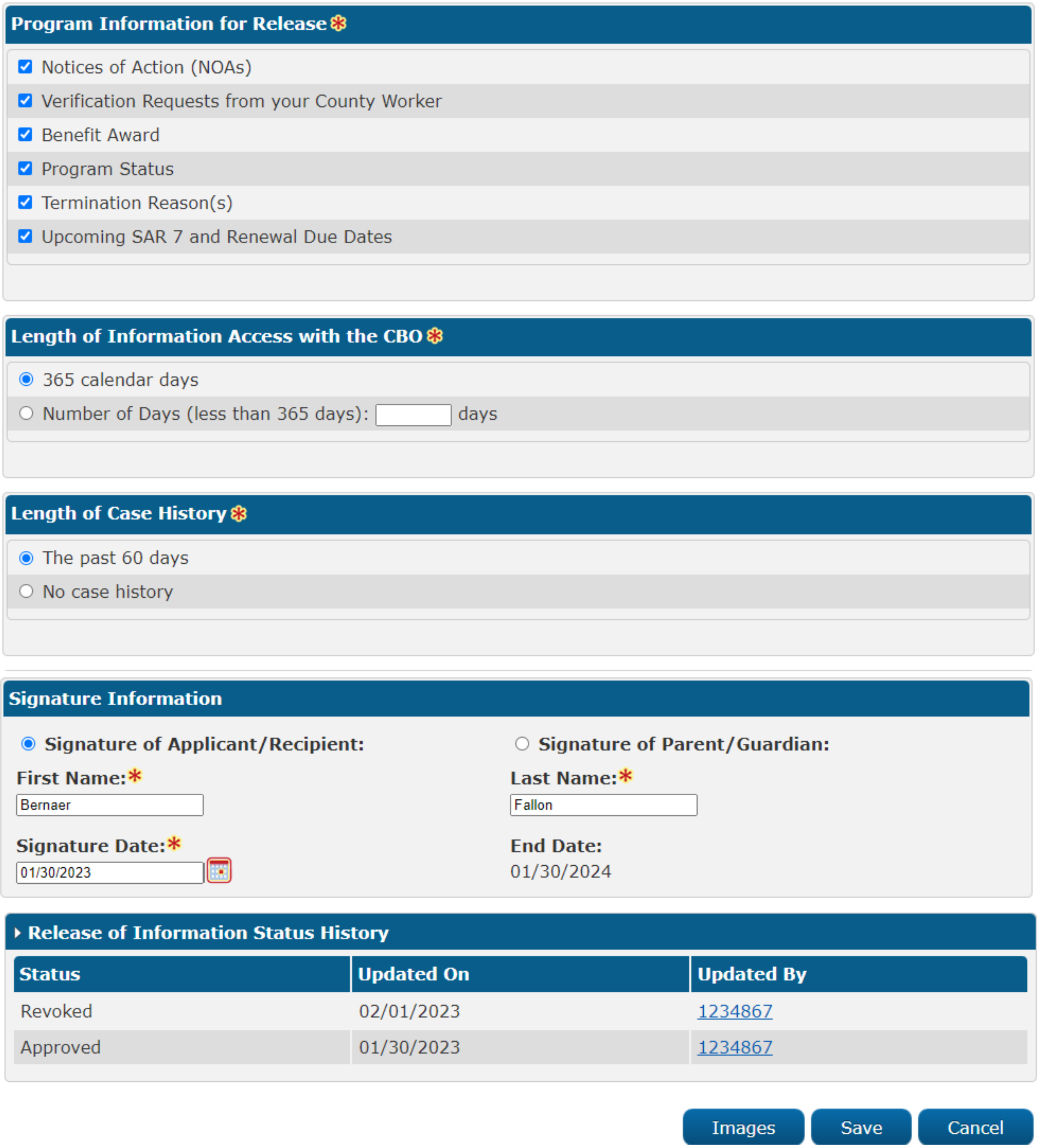
☑ Benefit Award

☑ Program Status

☑ Termination Reason(s)

☑ Upcoming SAR 7 and Renewal Due Dates

Figure 2.2.2-40 – Release of Information Detail Page – (Edit Mode-Release of Information-2)



Program Information for Release

- [x] Notices of Action (NOAs)
- [x] Verification Requests from your County Worker
- [x] Benefit Award
- [x] Program Status
- [x] Termination Reason(s)
- [x] Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO

- (●) 365 calendar days
- ( ) Number of Days (less than 365 days): ______ days

Length of Case History

- (●) The past 60 days
- ( ) No case history

Signature Information

(●) Signature of Applicant/Recipient: ( ) Signature of Parent/Guardian:

First Name:* Bernaer

Last Name:* Fallon

Signature Date:* 01/30/2023

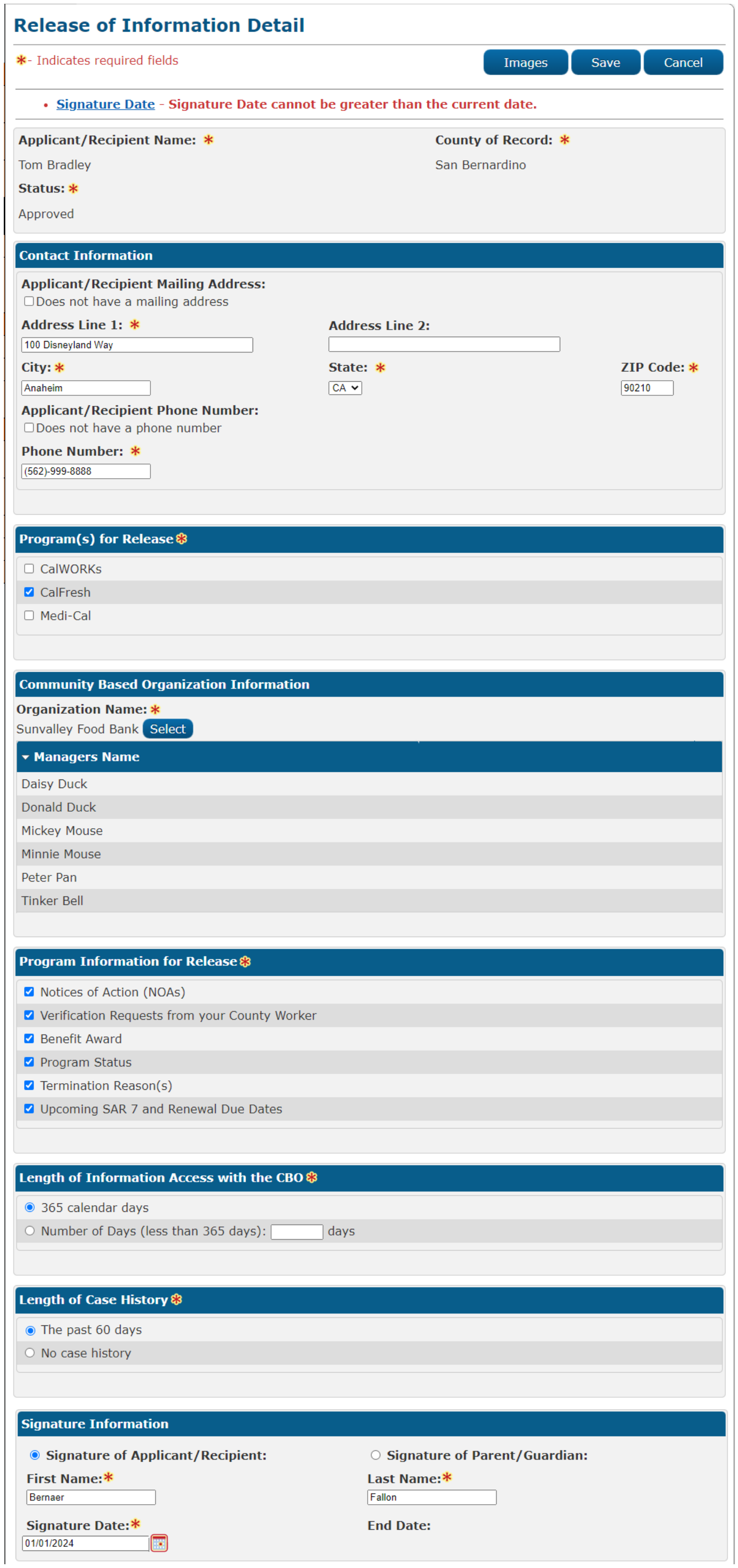
End Date: 01/30/2024

Release of Information Status History

Status	Updated On	Updated By
Revoked	02/01/2023	1234867
Approved	01/30/2023	1234867

Images Save Cancel

Figure 2.2.2-41 – Release of Information Detail Page – (Edit Mode-Release of Information-3)



Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Signature Date - Signature Date cannot be greater than the current date.

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Contact Information

Applicant/Recipient Mailing Address:

☐ Does not have a mailing address

Address Line 1: * 100 Disneyland Way

Address Line 2:

City: * Anaheim

State: * CA

ZIP Code: * 90210

Applicant/Recipient Phone Number:

☐ Does not have a phone number

Phone Number: * (562)-999-8888

Program(s) for Release *

☐ CalWORKs

☑ CalFresh

☐ Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank Select

Managers Name

Daisy Duck

Donald Duck

Mickey Mouse

Minnie Mouse

Peter Pan

Tinker Bell

Program Information for Release *

☑ Notices of Action (NOAs)

☑ Verification Requests from your County Worker

☑ Benefit Award

☑ Program Status

☑ Termination Reason(s)

☑ Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO *

◉ 365 calendar days

○ Number of Days (less than 365 days): ____ days

Length of Case History *

◉ The past 60 days

○ No case history

Signature Information

◉ **Signature of Applicant/Recipient:**

○ **Signature of Parent/Guardian:**

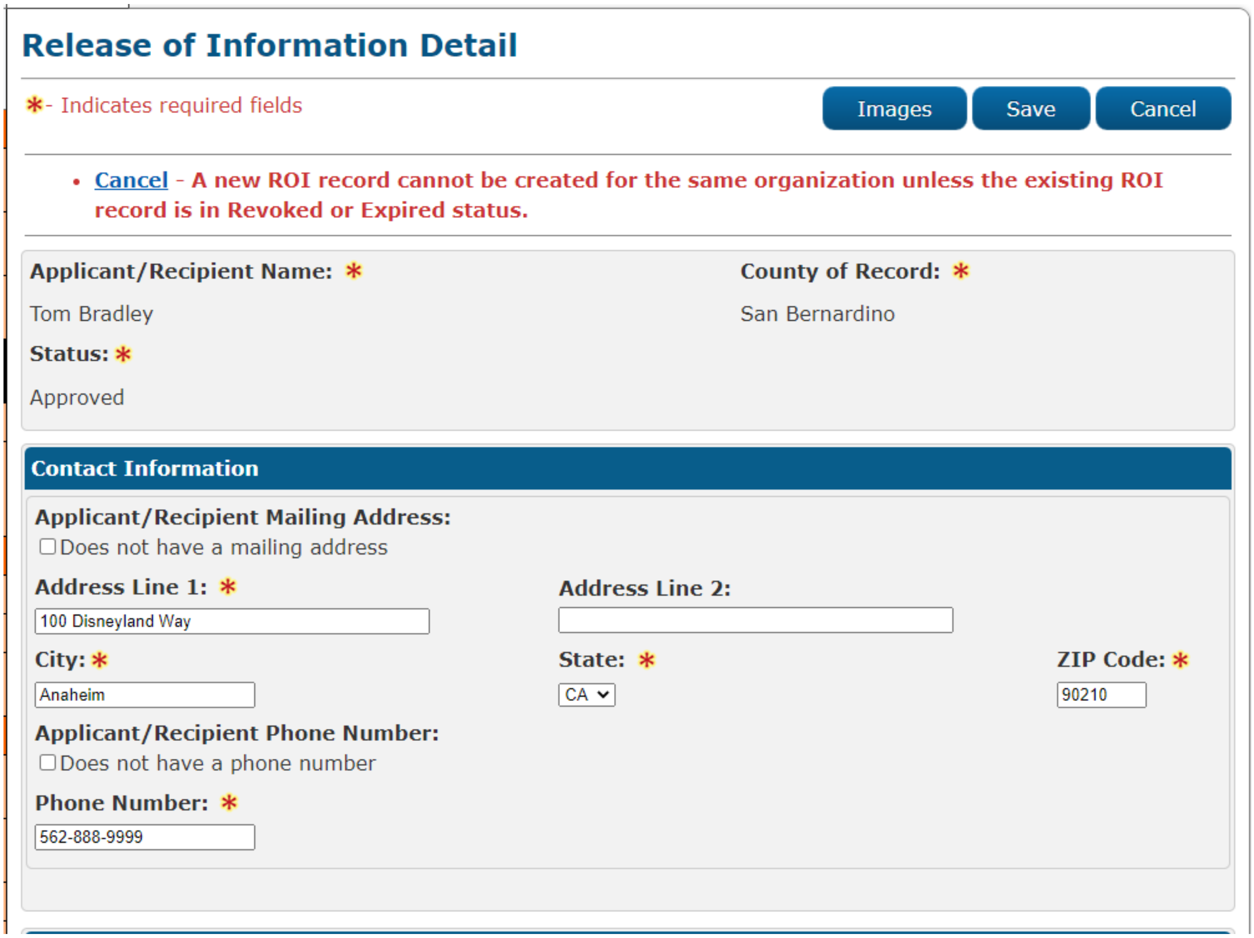
First Name: * Bernaer

Last Name: * Fallon

Signature Date: * 01/01/2024

End Date:

Figure 2.2.2-42 – Release of Information Detail Page – (Validation for Signature Date)



Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Cancel - A new ROI record cannot be created for the same organization unless the existing ROI record is in Revoked or Expired status.

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Contact Information

Applicant/Recipient Mailing Address:

☐ Does not have a mailing address

Address Line 1: *

100 Disneyland Way

Address Line 2:

City: *

Anaheim

State: *

CA

ZIP Code: *

90210

Applicant/Recipient Phone Number:

☐ Does not have a phone number

Phone Number: *

562-888-9999

Figure 2.2.2-43 – Release of Information Detail Page – (Validation for trying to create new ROI record for the same organization)

Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Program(s) for Release - At least one Program for Release is required. Please select a program.
- Program Information for Release - At least one Program Information for Release selection is required. Please make a selection.
- Length of Information Access with the CBO - Length of Information with the CBO selection is required. Please select a value.
- Length of Case History - Length of Case History selection is required. Please select a value.

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Contact Information

Applicant/Recipient Mailing Address:

☐ Does not have a mailing address

Address Line 1: *

100 Disneyland Way

Address Line 2:

City: *

Anaheim

State: *

CA

ZIP Code: *

90210

Applicant/Recipient Phone Number:

☐ Does not have a phone number

Phone Number: *

562-888-9999

Program(s) for Release *

☐ CalWORKs

☐ CalFresh

☐ Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank Select

Managers Name

Daisy Duck

Donald Duck

Mickey Mouse

Minnie Mouse

Peter Pan

Tinker Bell

Program Information for Release *

☐ Notices of Action (NOAs)

☐ Verification Requests from your County Worker

☐ Benefit Award

☐ Program Status

☐ Termination Reason(s)

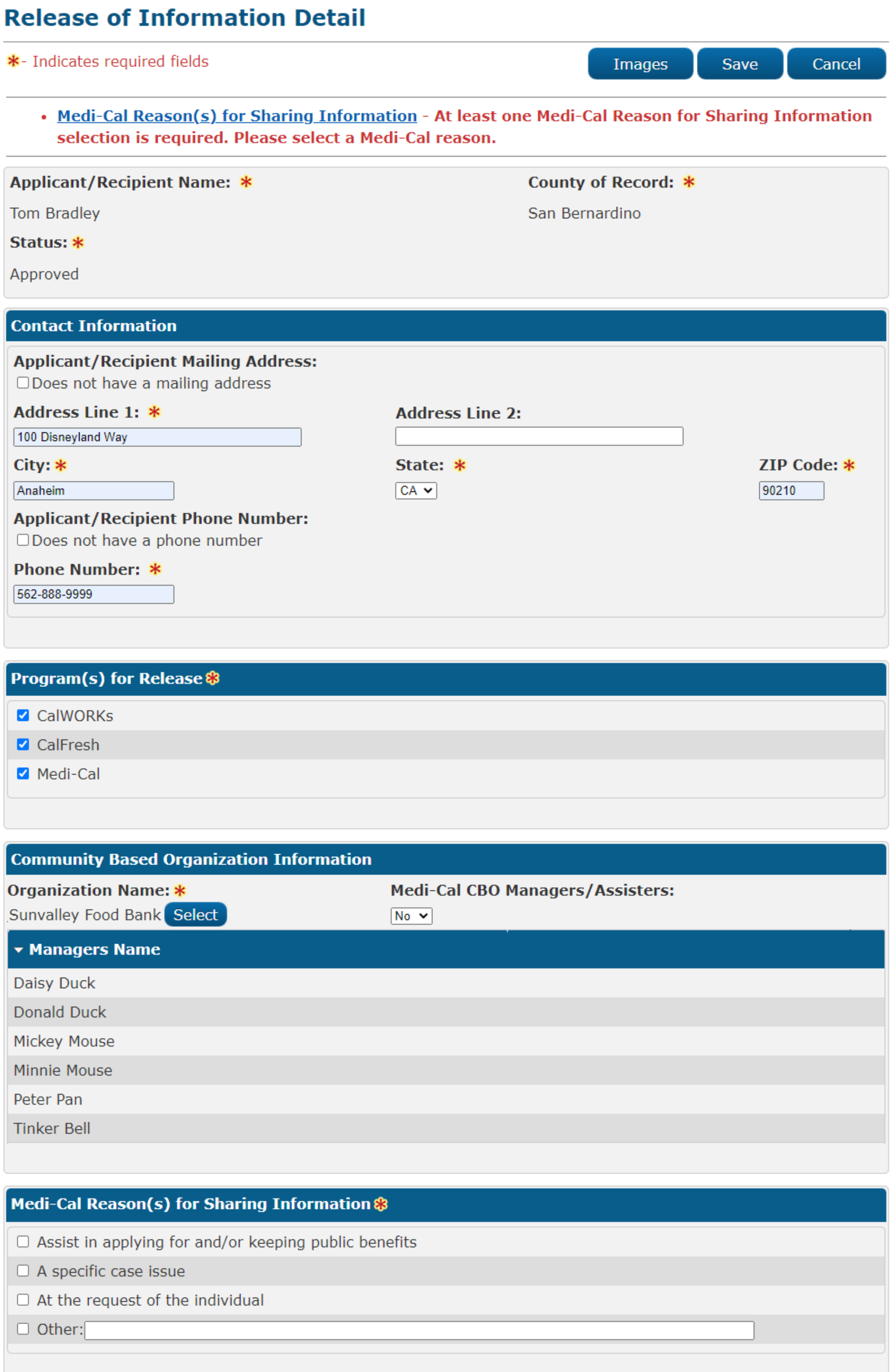
☐ Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO *

○ 365 calendar days

○ Number of Days (less than 365 days): ______ days

Figure 2.2.2-44 – Release of Information Detail Page – (Required selection validations)



Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Medi-Cal Reason(s) for Sharing Information - At least one Medi-Cal Reason for Sharing Information selection is required. Please select a Medi-Cal reason.

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Contact Information

Applicant/Recipient Mailing Address:

☐ Does not have a mailing address

Address Line 1: * 100 Disneyland Way

Address Line 2:

City: * Anaheim

State: * CA

ZIP Code: * 90210

Applicant/Recipient Phone Number:

☐ Does not have a phone number

Phone Number: * 562-888-9999

Program(s) for Release *

☑ CalWORKs

☑ CalFresh

☑ Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank Select

Medi-Cal CBO Managers/Assisters:

No

Managers Name

Daisy Duck

Donald Duck

Mickey Mouse

Minnie Mouse

Peter Pan

Tinker Bell

Medi-Cal Reason(s) for Sharing Information *

☐ Assist in applying for and/or keeping public benefits

☐ A specific case issue

☐ At the request of the individual

☐ Other:

Figure 2.2.2-45 – Release of Information Detail Page – (Required selection validations for Medi-Cal Reason(s))

2.3.3 Description of Changes

1. Create a new Release of Information Detail page that will be accessible from the Release of Information Search page.
    a. The Release of Information Detail page will have the following elements:
        i. Applicant/Recipient Name
            1. This is a required field and will not be editable (in both Create and Edit mode) and it will auto populate with the name of the person that was selected through the Select Person page.
            2. This will be in the format of First Name Last Name (Example: Tom Bradley).
        ii. Status
            1. This will be a required field.
            2. When in create mode (when the worker is trying to create the ROI record directly through CalSAWS) the field will automatically default to 'Approved', and it will not be editable.
            ~~Note: The ROI record will save with a status of 'Approved' when it's created directly through CalSAWS application.~~
            Note: ROI record will automatically be in 'Approved' status when it is created through CalSAWS application. Please see Section 2.7of the design document for further details on how an ROI record will automatically have a status of Approved when it comes in through the API.

            3. In Edit mode, the Status field will be an editable drop-down field.
                a. When the page first opens in Edit mode, the drop-down field will default to the latest status.
                    i. The drop-down field will have the following values when the latest status is 'Approved'.
                        1. Approved
                        2. Revoked
                Note: ROI record will automatically be in 'Approved' status when it is created through CalSAWS application. Please see Section 2.7of the design document for further details on how an ROI record will automatically have a status of Approved when it comes in through the API.

ii. The drop-down field will have the following values when the latest status is 'Pending'.
    1. Approved
    2. Pending
    3. Revoked

Note: The status of 'Pending' will only be possible when the ROI record was created through the API. Please reference Section 2.7 of the design document for further details on how an ROI record will automatically have a status of Pending when it comes in through the API.

iii. The drop-down field will have the following values when the latest status is 'Revoked'.
    1. Revoked
    2. Approved

Note: Please reference Section 2.7 of the design document for further details on how an ROI record will automatically have a status of Revoke when it comes through the API.

iv. The field will not be a drop-down and it will not be editable when the latest status is 'Expired'.

Note: The Status will automatically be updated to Expired based on the End Date of the ROI record. Please refer to Section 2.13 since this status will be updated through a new batch job.

b. Automatically update the status from 'Expired' to 'Approved' when the user clicks the Save button, when the page is in Edit mode, and the following conditions are met:
    i. The end date on the End Date field is after the system date.

    Note: This scenario is only possible when the user changes the Signature Date and/or the Length of information access with the CBO ROI information making the new End Date to be after the system date and the status of the ROI is already in Expired (Batch job to update the status to Expired already ran prior to the user making edit to the ROI record).

iii. County of Record
    1. This will be a required field and will not be editable. The page will automatically default to the county of the logged in user.
iv. Contact Information block
    a. The Contact Information block will have the following fields and will be editable when in Edit mode and the record was created directly through CalSAWS.
    Applicant/Recipient Mailing Address
        i. Does not have a mailing address
            1. This field will have a check box
            2. Clicking on the check box will gray out the Address Line1, Address Line 2, City, State and ~~Zip~~ ZIP Code fields.
            3. When the check box on this field is checked off, the system will not save any information that was entered on the Address Line 1, Address Line 2, City, State, and ~~Zip~~ ZIP Code.
                a. When the box is checked off, when the page is in Edit mode, any information that was previously saved from the above fields will be removed upon saving.
            4. The check box will not be checked off when in Create mode when the page initially loads.
            5. This field will not display in ~~a~~ View mode if it's not selected.
        ii. Address Line 1:
            1. This will be a required text field and the maximum number of characters is 50.
            2. Once the maximum amount of characters is reached, no

further characters can be added.

3. When the 'Does not have a mailing address' is checked off, the field will be greyed out and will no longer be required.
4. This field will not display in View mode when the 'Does not have a mailing address' is checked off.

iii. Address Line 2:

1. This will be a text field and the maximum number of characters is 60
2. Once the maximum amount of character is reached, no further characters can be added.
3. When the 'Does not have a mailing address' is checked off, the field will be greyed out.
4. This field will not display in ~~Edit and~~ View mode when the 'Does not have a mailing address' is checked off.

iv. City

1. This will be a required text field and the maximum number of characters is 50
2. Once the maximum amount of characters is reached, no further characters can be added.
3. When the 'Does not have a mailing address' is checked off, the field will be greyed out and will no longer be required.
4. This field will not display in View mode when the 'Does not have a mailing address' is checked off.

v. State

1. This will be a required drop-down field and will list all 50 states (in abbreviation) and

will be ordered in alphabetical order.
2. In create mode the field will default to 'CA'.
3. When the 'Does not have a mailing address' is checked off, the field will be greyed out and will no longer be required.
4. This field will not display in View mode when the 'Does not have a mailing address' is checked off.

vi. ~~Zip Code~~ ZIP Code:
1. This will be a text field and the maximum number of characters is 5.
2. Once the maximum amount of characters is reached, no further characters can be added.
3. When the 'Does not have a mailing address' is checked off, the field will be greyed out and will no longer be required.
4. This field will not display in ~~Edit and~~ View mode when the 'Does not have a mailing address' is checked off.
5. Create two new validations:
    a. "~~Zip Code~~ ZIP Code – Zip Code can only contain numeric characters."
        i. Validation will be triggered when the user clicks Save and the value entered contains alpha characters \ on the Zip Code field.
    b. ~~Zip~~ ZIP Code – Zip Code must be 5 characters in length."

i. Validation will be triggered when the user clicks Save, and value entered is not in the correct 5 character length.

b. Applicant/Recipient Phone Number
   i. Does not have a phone number
      1. This field will have a check box
      2. Clicking on the check box will gray out the Phone Number field.
      3. When the check box on this field is checked off, the system will not save any information that's entered on the Phone Number field.
         a. When the box is checked off and when the page is in Edit mode, any information that was previously saved from the above fields will be removed upon saving.
      4. The check box will not be checked off when in Create mode when the page initially loads.
      5. This field will not display in View mode if it's not selected.
   ii. Phone Number:
      1. This will be a required text field and the maximum number of characters is 13.
      2. Once the maximum amount of characters is reached, no further characters can be added.
      3. The system will automatically format the value as (xxx)xxx-xxxx upon saving when the value entered is only 10 characters long.

4. When the 'Does not have a phone number' is checked off, the field will be greyed out and will no longer be required.
5. This field will not display in View mode when the 'Does not have a Phone Number' is checked off.
6. Create one new validation:
   a. "Phone Number – The phone number must be in the format (999)999-9999 and cannot start with a zero.
      i. Validation will be triggered when the user clicks Save and the value entered contains alpha characters, it is not a minimum of 10 characters length, or it starts with '0'.

v. Program(s) for Release block
   1. This will be a required block and will be editable when in Edit mode and the record was created directly through CalSAWS. Users will need to select at least one of the available options.
   2. Display the following options with a select box. Users will be able to select all 3 options.
      a. CalWORKs
      b. CalFresh
      c. Medi-Cal
   3. Select boxes will not be checked off when the page initially loads in Create mode.
   4. When in View mode, all options will display but only the ones selected will have a check mark next to it.
   5. Create a validation that will be triggered when the user clicks on Save and there's no program that is selected from the Program(s) for Release block.
      a. Validation message will say the following "Program(s) for Release – At least one

Program for Release is required. Please select a program

vi. Community Based Organization Information block
    1. This block will be editable when the page is in Edit mode and the record was created directly through CalSAWS.
    2. When the page initially loads in Create mode the block will have a required field titled 'Organization Name' along with a Select button.
        a. Clicking the Select button will direct users to the Select Community Based Organization page (refer to Section 2.4 for more details on how the page will work).
        b. After an organization is selected, the user will be directed back to the Release of Information page and will now display the following information:
            i. The name of the selected organization along with the Select button (clicking the Select button again will direct the user to the Select Community Based Organization page).
            ii. A dynamic field titled "Medi-Cal CBO Managers/Assisters:"
                1. This field will only display when the Medi-Cal program is selected from the Program(s) for Release block and an Organization is already selected.
                2. This will be a drop-down field with the options of:
                    a. No (Default value)
                    b. Yes
                        i. When "Yes" is selected display a button titled "Select".
                        ii. Clicking "Select" button will call the CBO-Organization API (reference Section 2.9 for details on how this API will work) and will direct

users to the Select CBO Managers & Assisters for Medi-Cal page (refer to Section 2.5 for more details on how the page will work).

iii. After the Medi-Cal Specific Manager(s)/Assister(s) are selected the user will be directed back to the Release of Information Detail page. The page will continue to display the "Select" button (clicking the Select button again will make another call the CBO Organization API and will direct the user to the Select CBO Managers & Assisters for Medical page) next to the drop down field along with a new expanded sub block titled "Medi-Cal Specific Manager(s)/Assister(s)" (see below for more details on this sub block).

iii. An expanded sub block titled "Managers Name".
    1. This sub block will list the name(s) of all the Managers associated to the selected organization (the name of Managers that's displayed will be based on the information that is being returned from ForgeRock through the CBO – Organization API. Reference Section 2.9 for more details).
        a. Managers will be listed in the format of First Name Last Name (Example: Minnie Mouse)
        b. Managers will be listed in ascending alphabetical order by First Name.
    2. This sub block will not be expanded when the page first loads in View mode.
    3. This sub block will be expanded when the page first loads in Edit mode.
    4. The block will not display when the user is directed back to the Release of Information Detail page from the Select CBO Managers & Assisters for Medi-Cal page, and the users selected Managers and/or Assisters and the only program selected is Medi-Cal (the block will continue to display when the user clicks on the Cancel button from the Select CBO Managers & Assisters for Medi-Cal page).

iv. An expanded sub block titled "Medi-Cal Specific Manager(s)/Assister(s)".
    1. This sub block will have two columns titled "Medi-Cal Manager(s) Name" and "Medi-Cal Assister(s) Name".

a. The “Medi-Cal Manager(s) Name” column will list the name of the selected Managers that was selected through the Select CBO Managers & Assisters for Medi-Cal page.
    i. Managers will be listed in the format of First Name Last Name (Example: Mickey Mouse).
    ii. Managers will be listed in ascending alphabetical order by First Name.
b. The “Medi-Cal Assister(s) Name” column will list the name of the selected Assister(s) that was selected through the Select CBO Managers & Assisters for Medi-Cal page.
    i. Assisters will be listed in the format of First Name Last Name (Example: Mary Poppin).
    ii. Assisters will be listed in ascending alphabetical order by First name.

2. This sub block will not be expanded when the page first loads in View mode.
3. This subs block will be expanded when the page first loads in Edit mode.

4. The block will display when the user is directed back to the Release of Information Detail page from the Select CBO Managers & Assisters for Medi-Cal page and the Medi-Cal CBO Managers/Assisters is set to "Yes" and the users selected Managers and/or Assisters (the block will not display when the user clicks on the Cancel button from the Select CBO Managers & Assisters for Medi-Cal page).

v. Information that was entered or selected on the Release of Information Detail page prior to going to the Select CBO Managers & Assisters for Medi-Cal will remain.

3. Any selection that was made on the Community Based Organization Information block will not be retained when changes are made to the Program(s) for Release block after an organization is selected (this will include selecting the CBO Managers and Assisters specific for Medi-Cal).
   a. The block will display the field Organization Name (required field) along with a Select button.
      Note: The block will look the same way as when the page first initially loads in Create mode. Users will need to go through the same process of selecting the organization and all other fields mentioned above as applicable.

vii. Medi-Cal – Reason(s) for Sharing Information block
1. This will be a required block and will be editable when in Edit mode and the record was created directly through CalSAWS. Users will be able to select multiple options but will be required to select at least one of the available options.
2. When in View mode, all available options will be displayed but only the one that was selected will display a check mark next to it.
3. This will be a dynamic block and will only display when the 'Medi-Cal' option is selected from the Program(s) for Release block.
   a. This block will be located above the Program Information for Release block.

4. This block will have the following options listed in the following order
    a. Assist in applying for and/or keeping public benefits
    b. A specific case issue
    c. At the request of the individual
    d. Other:
        i. Other will be followed by a text field.
            1. Text field will have a maximum number of characters of 1000.
            2. Once the maximum number of characters is reached, no further characters can be entered.
        ii. Create the following validations:
            1. "Other – Field is required. Please enter a value. ~~This is a required field, please enter a value."~~
                a. Validation will be triggered when the users click Save and the Other option is selected from the Medi-Cal – Reason for Sharing Information block and there is no value entered on the text field.
            2. "Medi-Cal Reason(s) for Sharing Information – At least one Medi-Cal Reason for Sharing Information selection is required. Please select a Medi-Cal reason."
                a. Validation will be triggered when the users click Save and there's no selection made on the Medi-Cal Reason(s) for Sharing Information.

viii. Program Information for Release block
1. This will be a required block and will be editable when in Edit mode and the record was created directly through CalSAWS. Users will be able to select multiple options but will be required to select at least one of the available options.

            2. When in View mode, all available options will be displayed but only the one that was selected will display a check mark next to it.
            3. This block will be located below the Medi-Cal reason for Sharing Information block when the Medi-Cal program is also selected from the Program(s) for Release Block.
            4. This block will have the following options listed in the following order
                a. Notices of Action (NOAs)
                b. Verification Requests from your County Worker
                c. Benefit Award
                d. Program Status
                e. Termination Reason(s)
                f. Upcoming SAR 7 and Renewal Due Dates
            5. Create the validation "Program Information for Release – At least one Program Information for Release selection is required. Please make a selection."
                a. Validation will be triggered when the user clicks on Save and the there is no selection made on the Program Information for Release block.

ix. Length of Information Access with the CBO block
    1. This will be a required block and it will not be multi select (users can only select one).
    2. This will be an editable field when in Edit mode and the record was created directly through CalSAWS When in View mode, only the selected option will display.
    3. The following options will be available and have radio buttons next to them, and it will be listed in the following order:
        a. 365 calendar days
        b. Number of days (less than 365 days): "Text field" days
            i. "Text field" will be a text field
                1. The maximum number of characters allowed is 3.
                2. Once the maximum number of characters is reached, no further characters can be entered.
        c. Create ~~2~~ 3 validations
            i. "Number of days (less than 365 days) – Field is required. Please enter a

value. ~~This is a required field, please enter a value.~~"

1. Validation will be triggered when the user clicks Save and the Number of days (less than 365 days) option is selected from the Length of Information Access with the CBO block and no value is entered on the text field.

ii. "Number of days (less than 365 days) – Input [xxx] is not valid for this field.

1. Validation will be triggered when the users click Save and the value entered on the text field is greater than 365 or it contains alpha characters.
2. XXX will be the value entered on the text field.

iii. "Length of Information Access with the CBO – Length of Information with the CBO selection is required. Please select a value."

1. Validation will be triggered when the user clicks on Save and there is no selection made on the Length of Information Access with the CBO block.

x. Length of Case History block

1. This will be a required block and it will not be multi select (users can only select one).
2. This will be an editable field when in Edit mode and the record was created directly through CalSAWS.
3. When in View mode, only the selected option will display.
4. The following options will be available and have radio buttons next to them, and it will be listed in the following order
   a. The past 60 days
   b. No case history
5. Create a new validation "Length of Case History – Length of Case History selection is required. Please select a value."
   a. Validation will be triggered when the users clicks on Save and there is no selection made on the Length of Case History block.

xi. Signature Information block
   1. ~~All fields on this block will be editable in Edit mode when the record was created directly through CalSAWS except for the End Date field.~~
   2. Display the following fields:
      a. Signature of Applicant/Recipient:
         1. This section will display for all programs and when the page first loads in Create mode.
         2. This field will be editable when in Edit mode and for ROI records that's created directly through CalSAWS. This field will have a radio button and will be selected as a default when the page first loads in Create mode.
      b. Signature of Parent/Guardian
         i. This field will dynamically appear when CalWORKs and/or Medi-Cal program is selected from the Program(s) for Release block.
         ii. This field will have a radio button.
         iii. This field will be editable when in Edit mode and for ROI records that's created directly through CalSAWS.
      c. First Name
         i. This field will be a required field ~~.~~
         ii. This will be a text field and will have a maximum character limit of 30.
         iii. Once the maximum number of characters is reached, no further characters can be entered.
      d. Last Name
         i. This field will be a required field. ~~.~~
         ii. This will be a text field and will have a maximum character limit of 30.
         iii. Once the maximum number of characters is reached, no further characters can be entered.
      e. ~~Signature of Parent/Guardian:~~
         i. ~~This field will display and have a radio button when CalWORKs and/or Medi-Cal is selected on the Program(s) for Release block.~~
            1. ~~This field will not display when page initially loads in Create mode or when the only~~

~~program selected is CalFresh. In View mode, this field will not display if it's not selected.~~

f. Signature Date:
   i. The user can enter their desired date or click on the calendar icon to select the date.
   ii. This will be a required field.
   iii. This will be an editable field when in Edit mode and the record was created directly through CalSAWS.Signature Date will need to be in the format of MM/DD/YYYY (Example: 12/25/2022).
   iv. Create the following validations
      1. "Signature Date – Must be a valid calendar date and be in the form MM/DD/YYYY."
         a. Validation will trigger when the user clicks Save, and the date entered on the Signature Date field is not a valid calendar date or not in the correct format.
      2. "Signature Date – Signature Date cannot be greater than the current date.
         a. Validation will be trigger when the user clicks Save, and the date entered on the Signature Date field is after the system date.

g. End Date:
   i. This field will be blank when the page is in Create mode and will not be editable.
   ii. The system will automatically calculate and save the End Date as this will be based on the Signature Date and the option that is selected from the Length of Information Access with the CBO.
      1. The system will automatically calculate the new End Date when there's a change in

Signature Date and/or the selected option from the Length of Information Access with the CBO upon saving when the page is in Edit mode.

iii. Example 1: Signature Date is 01/18/2023 and the option selected from the Length of Information Access with the CBO is 365 calendar days. The system will automatically insert an End Date of 01/18/2024

iv. Example 2: Signature Date is 01/18/2023 and the option selected from the Length of Information Access with the CBO is Number of Days (less than 365 days): 5 days. The system will automatically insert an End Date of 01/23/2023

v. End Date will be in the format of MM/DD/YYYY

xii. Release of Information Status History block

1. Upon loading of the page, when in Create mode, this block will not be expanded.
2. Upon loading of the page, when in Edit or View mode, this block will be expanded.
3. This block will display all the history information of the statuses of the specific ROI record and will have 3 columns.
    a. Status
        i. This will display all the statuses of the ROI record.
        ii. The latest status will display on top.
    b. Updated Date
        i. This will display the Date that the ROI record was updated.
        ii. The date will display in the following format of MM/DD/YYYY
    c. Updated By
        i. This will display the Staff ID of the user that updated the record.
        ii. This will be a hyperlink and clicking on the hyperlink will take the user to the Worker Detail page for the selected Staff.

xiii. Create the following validation messages:

1. "Program(s) for Release – The selected Applicant/Recipient is not a primary applicant for the Program(s) selected."
    a. Validation message will be triggered when the user clicks Save, and the selected person is not a primary applicant for the Program(s) selected.
2. Cancel – A new ROI record cannot be created for the same organization unless the existing ROI record is in Revoked or Expired status.
    a. Validation message will be triggered when the user clicks Save, and there's already an existing ROI record for the same organization that's not in Revoked or Expired status.

xiv. Images button
1. Clicking this button will open the Hyland imaging solution on a new window.
2. Button will be available on the page in all modes (Create, Edit, View)
3. This button will only display to users that are assigned to either the 'ImagingSearchCase' security right or the 'ImagingSearchPerson' security right.
   Note: Both the 'ImagingSearchCase' and the 'ImagingSearchPerson' are existing security rights.

xv. Save button
1. Clicking this button will Save the ROI record and will direct the user to the Release of Information Detail page in View mode for the specific ROI record.
2. This button will display in both Create and Edit mode.

xvi. Cancel
1. Clicking this button will not save the ROI record or save any updates/changes to the record and will direct the user back to the Release of Information Search page.
2. This button will display in both Create and Edit mode

xvii. Close
1. Clicking this button will direct the user back to Release of Information Search page.
2. This button will display in View mode

xviii. Edit
1. This button will only display in View mode and only for users that are assigned to the ReleaseofInformationEdit Security Right.

2.3.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** Release of Information→ Select Person → Release of Information Search → Release of Information Detail

2.3.5 Security Updates

Security Right	Right Description	Right to Group Mapping
ReleaseofInformationView	Ability to search for and view the Release of Information Detail pages.	Release of Information View
ReleaseofInformationEdit ReleaseofInformationView	Ability to search for, view and add Release of Information Detail pages.	Release of Information Edit

Security Group	Group Description	Group to Role Mapping
Release of Information View	Ability to search for and view the Release of Information Detail pages.	Clerical Supervisor, Eligibility Staff, Eligibility Supervisor, Employment Services Supervisor, Hearings Staff, Hearings Supervisor, Help Desk Staff, Quality Assurance Staff, Quality Assurance Supervisor, Regional Call Center Staff, Regional Call Center Supervisor, Special Investigations Staff, Special Investigations Supervisor
Release of Information Edit	Ability to search for, view and	Eligibility Staff, Eligibility Supervisor

Security Group	Group Description	Group to Role Mapping
	add Release of Information Detail pages.	

2.3.6 Page Mapping

Add page mapping for the Release of Information Detail page.

2.3.7 Page Usage/Data Volume Impacts

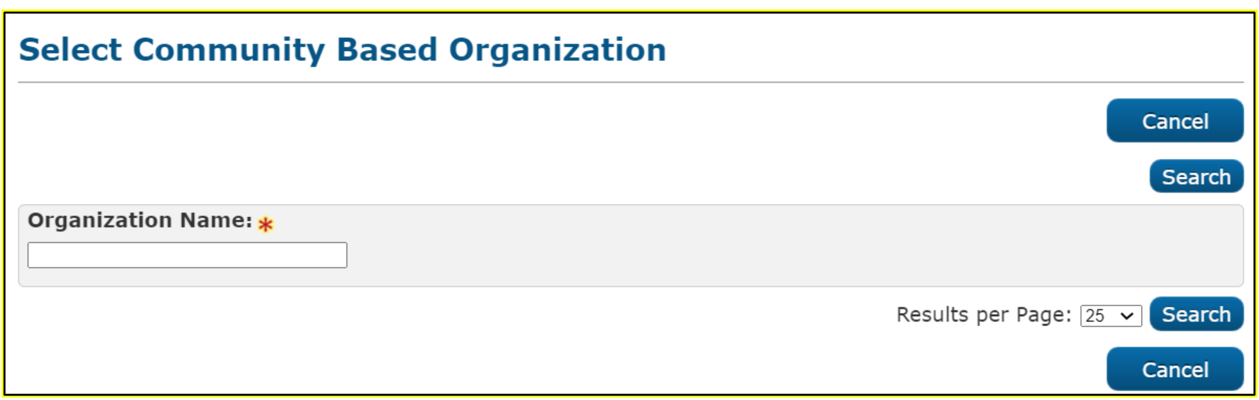
N/A

2.4 Select Community Based Organization

2.4.1 Overview

The Select Community Based Organization page will display a list of all the approved organizations for the County of the logged in User. Also, it will allow the user to select an approved organization for the CBO ROI.

2.4.2 Select Community Based Organization – Mockup



~~**Figure 2.4.2-1 – Select Community Based Organization Page (No Search Results)**~~

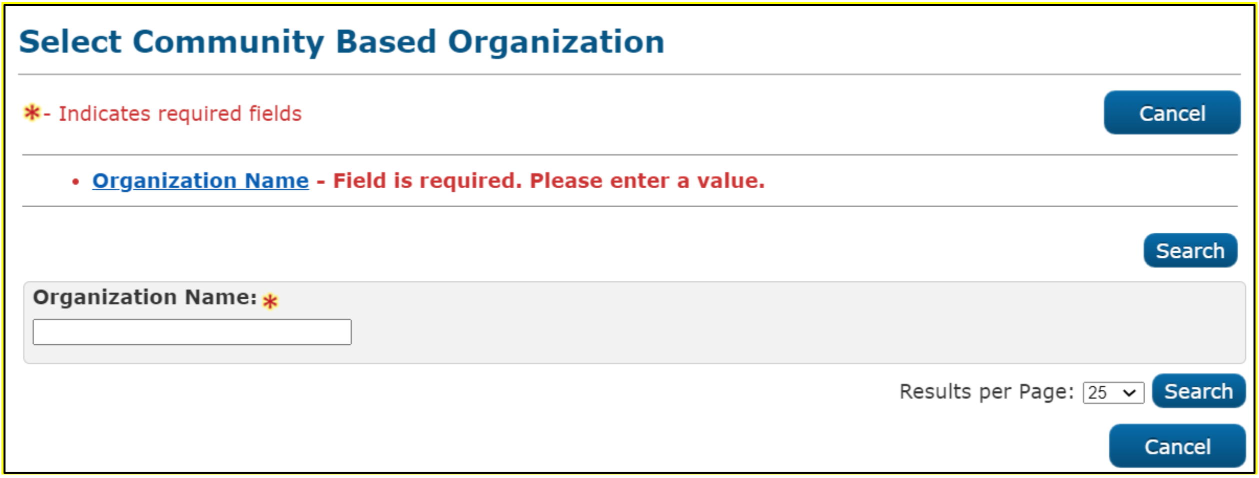


Figure 2.4.2-2 – Select Community Based Organization Page (With Validation Message)

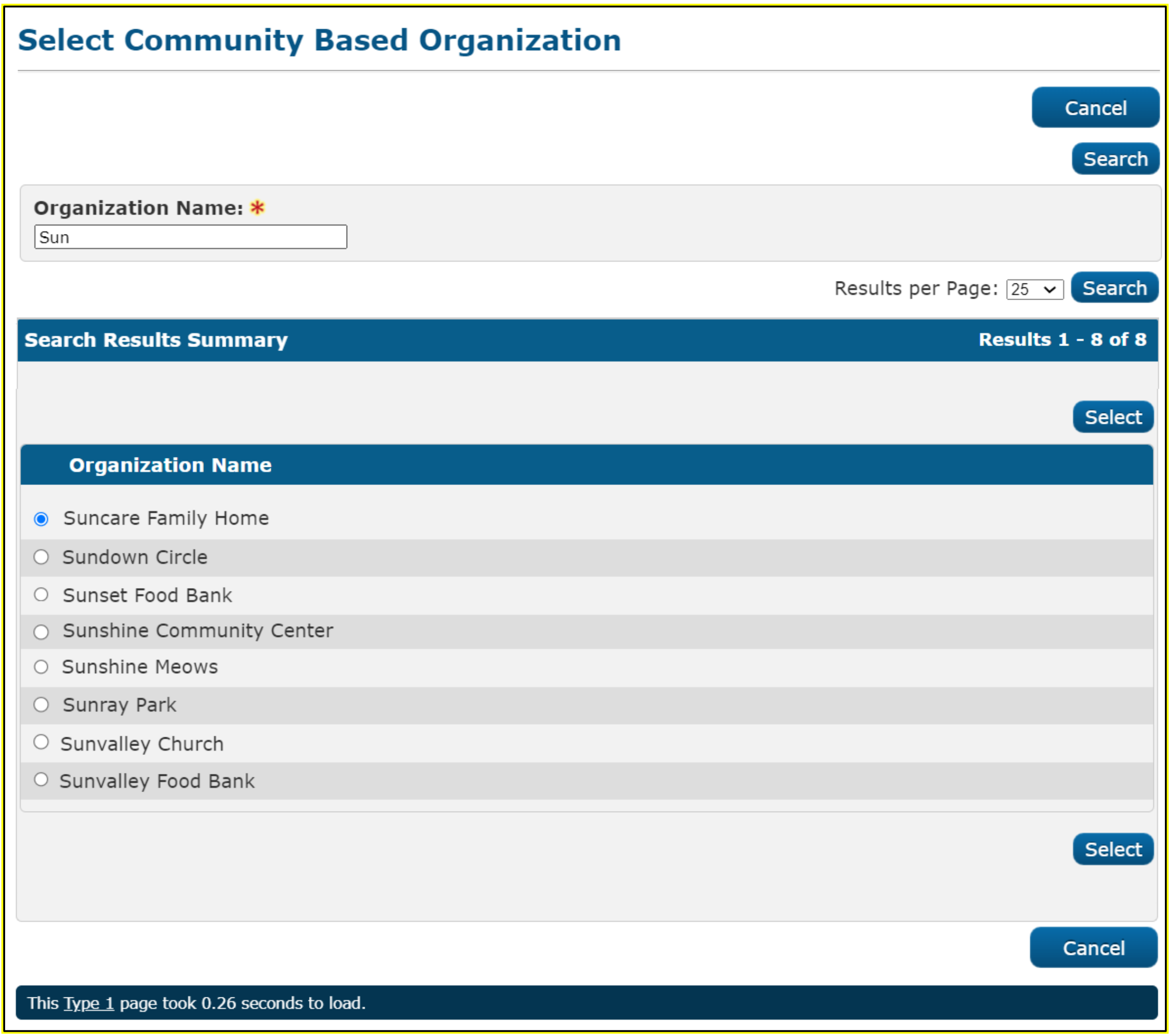


Figure 2.4.2-3 – Select Community Based Organization Page (With Search Results)

2.4.3 Description of Changes

1. Create a new page titled 'Select Community Based Organization'.
    a. This page will be accessible upon clicking on 'Select' button on the Organization Name field in the 'Community Based Organization Information' section of the 'Release of Information Detail' page.
    b. Upon loading, it will display the Organization Name field and a text box underneath as displayed in the figure 2.4.2-1.
        i. It will be an alphanumeric required field.
        ii. Maximum number of characters allowed for this field will be 255. Once the maximum number of characters is reached, no further character can be added.
        iii. A validation will be displayed: "Organization Name – Input [/] is not valid for this field." This validation will be displayed when user enters forward slash (/) in the text box and clicks search.
        iv. When there is no data found based upon the search criteria entered, page will display the message "No Data Found."
    c. Upon loading, the page will not display the Search Results Summary section as displayed in the figure 2.4.2-1.
    d. Cancel Button:
        i. Clicking on Cancel button will navigate the user back to the Release of Information Detail page in the same mode it was before.
    ~~e.~~ Search Button: Upon entering the search criteria in the Organization Name text box and clicking on Search button will display a list of CBOs in the Search Results Summary section as displayed in the figure 2.4.2-3 following the search criteria. (Reference section 2.9.2).
        i. The list of organization names will be in an ascending alphabetical order.
        ii. The first option in the Search Results Summary section will be pre-selected.
        iii. Add a validation:

"Organization Name – Field is required. Please enter a value." This validation will be displayed when user clicks on Search button without entering the search criteria in the Organization Name text box.

f. Results per Page:
    i. This dropdown limits how many records display per results per page.
    ii. The options are:
        1. 25 (default)
        2. 50
        3. 75
        4. 100
    iii. If there are more than 25 records, pagination will occur.

g. Upon selecting an organization and clicking on Select button, user will be navigated back to the Release of Information Detail page in the same mode it was before.

2.4.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** Release of Information

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Select CBO Managers & Assisters for Medi-Cal

2.5.1 Overview

Select CBO Managers & Assisters for Medi-Cal page will allow the user to select manager(s) and/or assisters(s) for the Medi-Cal program. This page will be accessible upon selecting Yes and clicking on Select button in the Medi-Cal CBO Managers/Assisters field in the Community Based

Organization Information section of the Release of Information Detail page.

2.5.2 Select CBO Managers & Assisters for Medi-Cal – Mockup

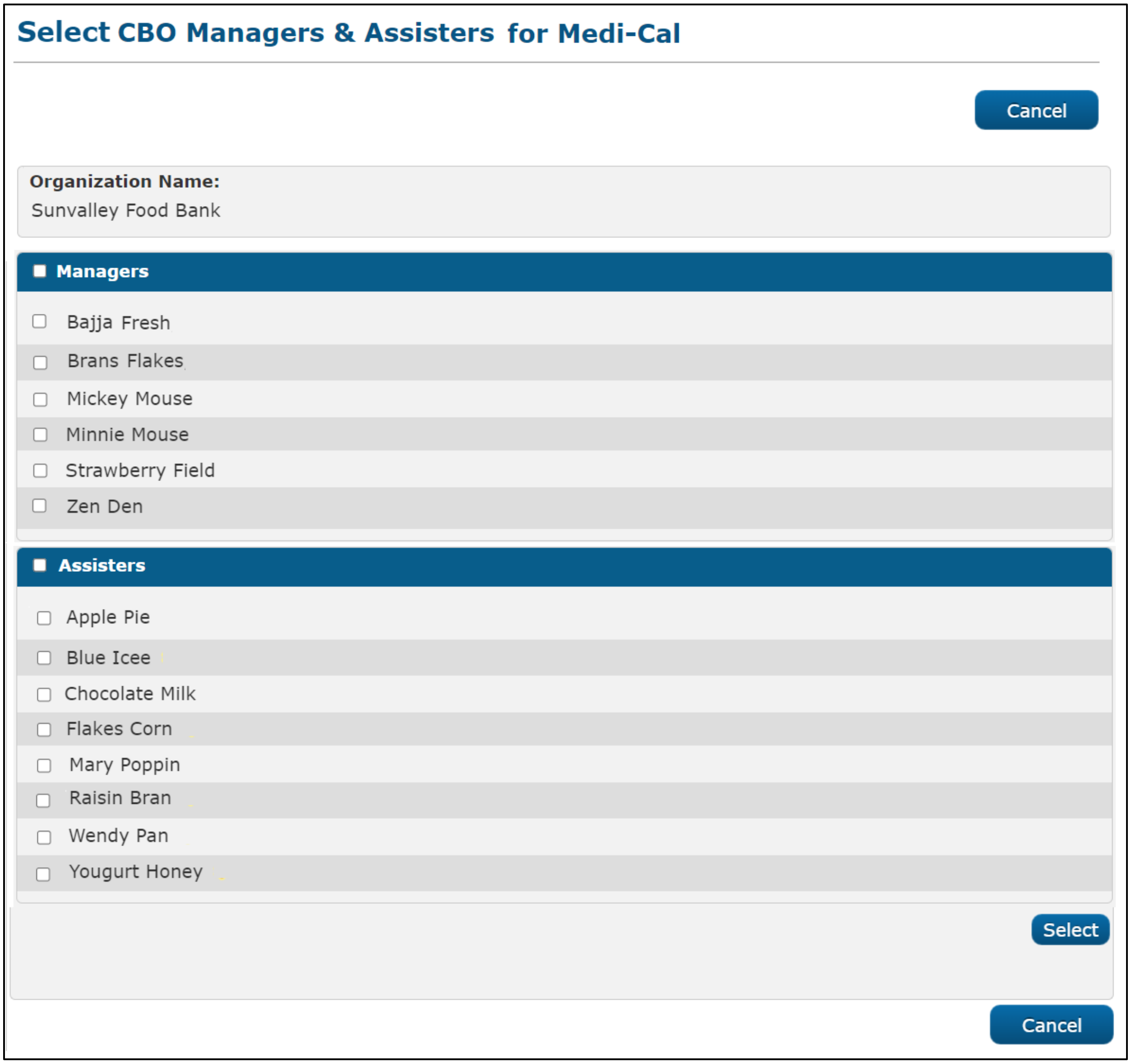


Figure 2.4.2-1 – Select CBO Managers and Assisters for Medi-Cal

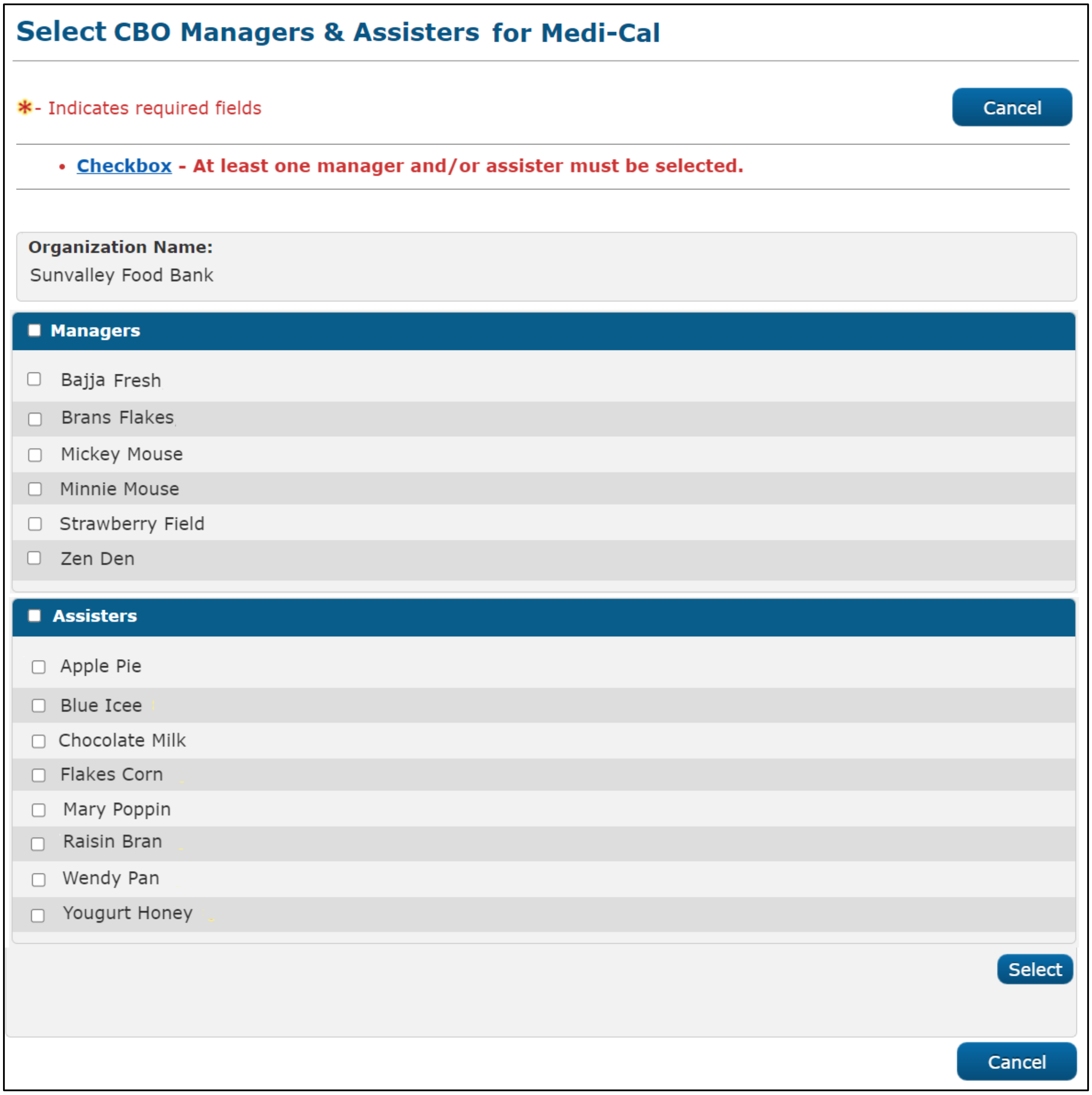


Figure 2.4.2-2 – Select CBO Managers and Assisters for Medi-Cal (With Validation)

2.5.3 Description of Changes

1. Create a new page titled 'Select CBO Managers & Assisters for Medi-Cal'.
    a. This page will be accessible when the user clicks the Select button on the Medi-Cal CBO Managers/Assisters field in the Community Based Organization Information section of the Release of Information Detail page.
    b. Organization Name:

i. Upon loading, this field will automatically display the organization name that was selected. This field is not editable.

c. Cancel button:

i. Clicking on Cancel button will navigate the user back to the Release of Information Detail page in the same mode it was before.

d. This page will display two sections.

i. Managers: It will display the entire list of managers belonging to the selected organization formatted as <FirstName LastName> in an ascending alphabetical order.

1. There will be a check box next to the Header-Managers to select all the managers in the list.
2. The list of managers' names will have a check box next to each name. The user may select one or multiple managers.

ii. Assisters: It will display the entire list of the assisters belong to the selected organization formatted as <FirstName LastName> in an ascending alphabetical order.

1. There will be a check box next to the Header-Assisters to select all the assisters in the list.
2. The list of assisters' names will have a check box next to each name. The user may select one or multiple assisters.

e. Select button:

i. Upon selecting manager(s) and/or assister(s) and clicking on Select button will navigate the user to the Release of Information Detail page in the same mode it was before. Add validation: Checkbox - At least one manager and/or assister must be selected. This validation will be displayed when user clicks on Select button without selecting a manager and/or assister.

2.5.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** Release of Information

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Case Summary

2.6.1 Overview

This page allows the user to access the case summary of the entire case, including summaries of the programs on the selected case. The 'Self-Service Portal' section displays the e-Application and linked persons information. This change will add a new section under 'Self-Service Portal' to display the CBO ROI information (this will display for all the cases in the county where the primary applicant has an ROI record created for either CW/CF/MC program).

2.6.2 Case Summary – Self-Service Portal Mockup

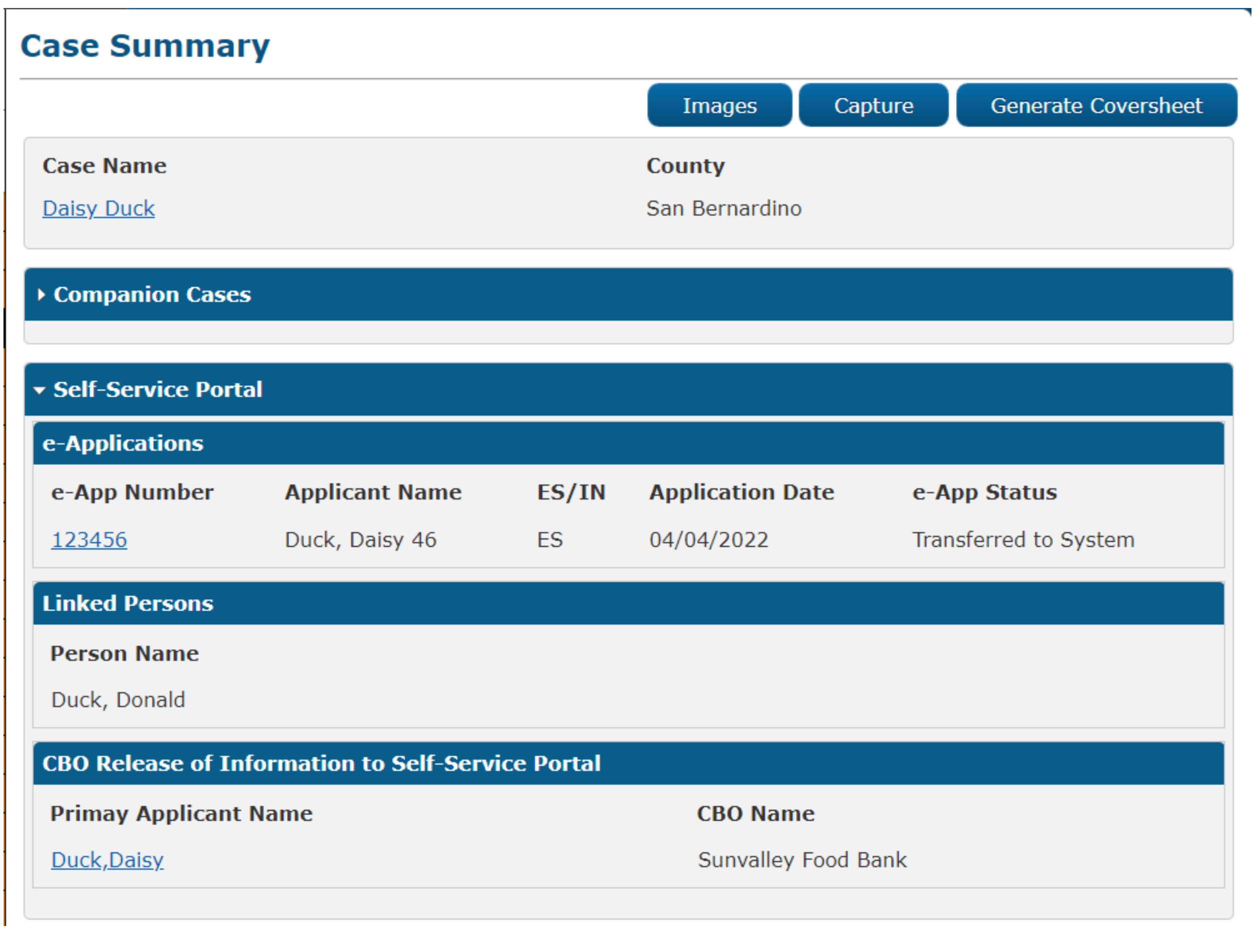


Figure 2.5.2-1 – Case Summary Page – Self-Service Portal Section – 1

2.6.3 Description of Change

1. Add a new sub block title 'CBO Release of Information to Self-Service Portal' on the 'Self-Service Portal' block of the page.
    a. The new 'CBO Release of Information Self-Service Portal' sub block will display a list of ROI records that meets the following conditions: ~~both conditions:~~
        i. The primary applicant (Applicant/Recipient Name on the Release of Information Detail) on the ROI record is a primary applicant to one of the following programs: CalWORKs, CalFresh, Medi-Cal on the case that is being viewed.
        ii. The ROI records belongs to the same county ('County of Record' on the Release of Information Detail) as the Case that is being viewed.
        iii. Only ROI records that are in 'Approved' status.
        iv. Examples:
            1. ROI records were created for Daisy Duck in the San Bernardino County (County of Record on the Release of Information Detail is San Bernardino). Viewing the Case Summary page for Case A12345 that belongs to San Bernardino where Daisy Duck is the primary applicant for both CalFresh and Medi-Cal program, but not for CalWORKs. The ROI records for Daisy Duck will display in this scenario.
            2. ROI records were created for Daisy Duck in the San Bernardino County (County of Record on the Release of Information Detail is San Bernardino). Viewing the Case Summary page for Case A56789 that belongs to San Bernardino where Daisy Duck is not the primary applicant for CalWORKs, CalFresh or Medi-Cal program. The ROI records for Daisy Duck will not display in this scenario.
            3. ROI records were created for Daisy Duck in the San Bernardino County (County of Record on the Release of Information Detail is San Bernardino). Viewing the Case Summary page for Case ABC123 that belongs to San Bernardino where Daisy Duck is the primary applicant for GR/GR program but not for CalWORKs, CalFresh or Medi-Cal programs. The ROI records for Daisy Duck will not display in this scenario.
            4. ROI records were created for Daisy Duck in the San Bernardino County (County of Record on the Release of Information Detail is San Bernardino). Viewing the Case Summary page for Case B2WCW90 that belongs to Los Angeles where Daisy Duck is the primary applicant for CalWORKs,

CalFresh and Medi-Cal program. The ROI records for Daisy Duck will not display in this scenario.

b. The new 'CBO Release of Information Self-Service Portal' sub block will have two columns titled 'Primary Applicant Name' and 'CBO Name'.
   i. The 'Primary Applicant Name' column will display the name of the primary applicant for the ROI record.
      1. This will be the 'Applicant/Recipient' name on the Release of Information Detail page.
      2. The name will display in the format of Last Name, First Name (Example: Duck, Daisy) and will display as a hyperlink for users that are assigned to the ReleaseofInformationView or ReleaseofInformationEdit Security right (these are new security rights that are being created as part of this SCR).
         a. Clicking the hyperlink will direct the users to the Release of Information Detail page in View mode.
   ii. The 'CBO Name' column will display the name of the organization for the corresponding ROI record.
      1. This is the name of the organization that's selected on the Release of Information Detail page.

c. The new 'CBO Release of Information Self-Service Portal' sub block will not display when there's no ROI records to be listed.

2. Hide the 'CBO' column from displaying on the 'Linked Person' block on the Case Summary page.

2.6.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Add page mapping for the 'CBO Release of Information to Self-Service Portal' section of the Case Summary page.

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Release of Information - ROI API

2.7.1 Overview

The Release of Information API is a RESTful webservice that will allow CalSAWS to do the following:

- Send ROI information to Self-Service portal when an ROI record is created and approved in CalSAWS.
- Send and receive the ROI status updates for existing ROI records.
- Retrieve the ROI information from Self-Service portal and store in CalSAWS Release of Information pages. This information will be readily available in the Release of Information Detail page.

Refer to Appendix section for process flow that are supported by this API.

2.7.2 Description of Change

1. Create a new RESTful API webservice in CalSAWS to save, update, and send the following Release of Information form attributes.
    a. Release of Information Attributes – These are the attributes that CalSAWS will display on the new Release of Information Detail page and send ROI details to the Customer's and CBO's Self-Service Portal account.
        i. Refer to Supporting documents section for ROI API data field mapping.

Release of Information Attributes	
Attribute	**Description**
County	The name of county that information is being requested from. Note: For API purposes, the County will be received/sent in a county code format (i.e., Los Angeles County = 19)
Applicant/Recipient Name	The first and last name of the Customer listed on the CBO ROI form. This is the Primary Applicant of the program on a case.
Applicant/Recipient Mailing Address	The mailing address of the ROI Customer listed on the CBO ROI form.
Mailing Address Indicator	This indicates if the ROI Customer does not have a mailing address

Release of Information Attributes	
Attribute	**Description**
Applicant/Recipient Phone Number	The phone number of the ROI applicant listed on the CBO ROI form
Phone Number Indicator	This indicates if the ROI applicant/recipient, listed on the CBO ROI form, does not have a phone number
CBO Name	The name of the of Community-Based Organization.
Program(s)	The type of program(s) for which the ROI applicant/recipient wishes to share information. Selections will include: • CalFresh (CF) • CalWORKs (CW) • Medi-Cal (MC)
CBO Individual(s) *(If Medi-Cal program is selected)*	The name(s) of the CBO individual(s) (Managers and/or Assisters) associated to a CBO, as indicated by the Customer.
Medi-Cal Reason(s) *(If Medi-Cal program is checked)*	This lists the Medi-Cal reasons for sharing the information to a CBO manager/assister. Selections include the following: • Assist in applying for and/or keeping public benefits • A specific case issue • At the request of the individual • Other – ROI applicant/recipient may specify a reason if the reasons above do not apply.
Benefit Details to be shared to CBO	The specific case information to be released to the CBO identified on the CBO ROI form. The selection list includes the following (*See Case Details – CBO API for case information details*): • Notices of Action (NOAs) • Verification Requests from your County Worker • Benefit Award • Program Status • Termination Reason(s) • Upcoming SAR 7 and Renewal Due Dates – Note: These SAR 7 and RE due dates pertain to current or most recent dates.

Release of Information Attributes	
Attribute	**Description**
ROI Time Period	The desired length of time the applicant/recipient chooses to share case information with the CBO Manager/Assister. This time period begins the date the form is signed. Time period options include either: • 365 calendar days or • Number of days (less than 365 days): {'X' Number of days} days **Note**: Any new specific information indicated from the applicant/recipient to share becomes available during this time period will also be available to the CBO Manager/Assister.
Case History Time Period	The desired length of time the applicant chooses to share case history, except for any previous NOAs, with CBO Manager/Assister. The time period options include either: • The past 60 days – 60 days prior to date of signature. When selected, all identified data elements between 60 days prior to date of signature and the current date will be able to be viewed by the CBO Manager/Assister. • No Case history – When selected, all identified data elements between date of signature and current date will be able to be viewed by the CBO Manager/Assister. **Note**: Not all case information history can be shared to a CBO (i.e., Historical NOAs/Forms, Verification Requests, Program Status, and SAR 7 and Renewal Due Dates will not be shared to the CBO)
Applicant/Recipient Name	The first and last name of Customer on the ROI. This is the Primary Applicant of the program on a case. **Note**: There are two locations for a customer to enter their name. The second field location is right above the 'Signature of Applicant/Recipient'.

Release of Information Attributes	
Attribute	**Description**
Signature of Applicant/Recipient	The applicant/recipient's signature on the CBO ROI form
Applicant Signature Date	The date the CBO ROI form was signed by the applicant/recipient
Birth Date	The applicant/recipient's date of birth indicated on the CBO ROI form
Signature of Parent/Guardian	The Parent/Guardian's signature is required for Minor Cases, in some instances. The signature may only be needed if the program selected is CalWORKs or Medi-Cal.
Parent Signature Date	The date the CBO ROI form was signed by the Parent/Guardian of the ROI applicant/recipient

2. Create CTCR to add a new reference column for Category 263 and add a 'Y' indicator for the following statuses for ROI: Approved, Pending, Expired, Revoked.
3. Create a new Release of Information API that accepts and stores the data elements in (Section 2.7.2.1.a.i – CBO ROI Form Attributes) in the POST method for a matched County, Customer GUID and CBO/CBO Manager/Assister GUID. The ROI information will be processed and stored in CalSAWS.
    a. All form attributes are required to be completed, or have an option selected (when applicable), with the exception of a chosen Assister for Medi-Cal or Signature of Parent/Guardian, to facilitate the automated process into CalSAWS and to BenefitsCal. If the form is incomplete, the automated process will not occur, and the CBO will not have access to the customer's case information.
    b. If all form attributes are complete and an 'Approved' or 'Pending' ROI status is received in the API, the ROI information will be populated into the Release of Information Detail page.
        i. Approved status – all form attributes are complete and Name/DOB match is found in CalSAWS.
        ii. Pending status – all form attributes are complete but there is a discrepancy in Name/DOB. This will require a worker to validate/review the ROI detail for the customer.
        iii. Create a Journal entry for the case with details when an automated ROI is received with an 'Approved' or 'Pending' status.
            1. Person Name: The individual's First and Last name listed on the CBO ROI form.

2. Date Received: The date the ROI from was received in CalSAWS. Format: MM/DD/YYYY
3. CBO Name: The name of the CBO listed on the CBO ROI form.
4. ROI Status: The status of the ROI received via API. Status = Approved or Pending.
5. Signature Date: The signature date documented on the customer's CBO ROI form.

Journal Entry	Description
New/Update	Yes
Journal Category	Interfaces
Journal Type	~~Self-Service~~ Self Service
Short Description	CBO ROI Form Received
Long Description	A~~n~~ CBO ROI Form with an effective date of {Signature Date} has been received with a {ROI Status} status on (Date Received} for {Person Name} with the Organization: {CBO Name}.
Trigger Condition	When an automated ROI is received through the API with an 'Approved' or 'Pending' status

c. When the ROI details is successfully received and stored into the Release of Information Detail page (Approved or Pending status), send the following response to BenefitsCal:
   i. ROI Identifier – System generated identifier for an ROI record.
   ii. Signature Date – The effective date or Signature date of the ROI.
   iii. Expiration Date – The expiration date or end date created based on the Signature date and 'Length of Information Access with a CBO' of the ROI. **Note**: The expiration date will be set in CalSAWS.

~~d. Invoke a store call in the POST method for ROI with 'Approved' status. This will bypass the document routing rule task for an imaged CBO ROI form for an 'Approved' ROI. This will result in a document routing rule task to only generate for a 'Pending' ROI.~~

e. Refer to Appendix section '*Release of information form submission process flow*'. The diagrams depict the various channels a CBO ROI form can be submitted and processed in CalSAWS.

4. Create a Customer View endpoint in the ROI API that pulls and sends the CBO ROI form details (Section 2.7.2.1.a.i – CBO ROI Form Attributes) in the GET method based on matched Customer GUID. The ROI information will be sent from the CalSAWS ROI API and sent to display on the customer's Self-Service Portal account.
    a. Send the following in the response to BenefitsCal:
        i. ROI Identifier – System generated identifier for an ROI record.
        ii. ROI Status – The current status of the ROI record.
        iii. County Code – The county code of the ROI record.
        iv. Signature Date – The date of signature of the ROI record.
        v. Expiration Date – The expiration date of the ROI record.
        vi. Benefit details – The selected benefit details on the ROI record.
        vii. CBO Info – The name of the CBO, including any listed CBO Managers and/or Assisters.
        viii. Case history indicator – This indicates the customer consents to share the past 60 days from signature date of case history.

5. Create a CBO View endpoint in the ROI API that pulls and sends the customers ROI information in the GET method based on a matched CBO/CBO Manager/Assister GUID. The ROI information will be sent from the CalSAWS API and sent to display on the CBO's Self-Service Portal account.
    a. Send the following in the response to BenefitsCal:
        i. ROI Identifier – System generated identifier for an ROI record.
        ii. ROI Status – The current status of the ROI record.
        iii. County Code – The county code of the ROI record.
        iv. Expiration Date – The expiration date of the ROI record.
        v. Applicant Name – The first and last name of the primary applicant.
        vi. Date of Birth – The date of birth of the applicant.

6. Create a ROI Status API endpoint that responds with the following information in the request for the PUT method based on the following parameters when a customer revokes their ROI through their Self-Service Portal account:
    a. ROI Identifier – System generated identifier for an ROI record.

b. ROI Status – The ‘Revoked’ status of the ROI. **Note**: The Customer can only update the status of their ROI record to ‘Revoked’ on their Self-Service Portal account or by contacting the county. A CBO Manager/Assister cannot Revoke an ROI via their Account.
c. Action Date – The effective date of the ROI status update for an existing ROI record.
d. Create a Journal entry for the case with details when the ROI status for an existing ROI record is automatically updated via ROI API.
    i. Person Name: The individual’s First and Last name listed on the CBO ROI form.
    ii. CBO Name: The name of the CBO on the CBO ROI form
    iii. ROI Status: The ‘Revoked’ status of and ROI record updated via API.

Journal Entry	Description
New/Update	Yes
Journal Category	Interfaces
Journal Type	~~Self-Service~~ Self Service
Short Description	ROI Status updated
Long Description	The ROI status for {Person Name} with Organization: {CBO Name} has been updated to {ROI Status}.
Trigger Condition	When the status of an existing ROI was updated to ‘Revoked’ through the ROI API.

2.7.3 Partner Integration Testing

Yes

2.7.4 Execution Frequency

Real-Time web service

2.7.5 Key Scheduling Dependencies

N/A

2.7.6 Counties Impacted

CalSAWS counties

2.7.7 Category

N/A

2.7.8 Data Volume/Performance

N/A

2.7.9 Interface Partner

BenefitsCal

2.7.10 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.8 Forms API – ROI

2.8.1 Overview

The Forms API is a RESTful webservice that generates a PDF of a form with the customer's answers mapped and uploads the said form to the imaging solution. This service will be updated to have the ability to generate the CBO ROI form with customer's answers and upload to the imaging solution.

2.8.2 Description of Change

1. Update the existing Forms RESTful API with a ROI operation that accepts a request body with a county code, applicant name, and details to the CBO ROI form when successfully received in the ROI API.
    a. This API will generate a Release of Information (ROI) (ABCDM 229) with Applicant/Recipient information populated.
    b. The API will return a successful response when the PDF has been successfully generated given the request parameters it. Received. Refer to section 2.7.2.1 for CBO ROI form attributes.
    c. In case of errors, the API will return customized error responses.

d. Upon successful generation of the form, it will upload the form to the imaging solution.

2. Store the CBO ROI form into the designated Imaging System drawer.
   a. For a customer with an existing case within the County, automatically store the CBO ROI form in the imaging solution person drawer.
   b. For a customer with no existing case submitting an CBO ROI form with an application, store in the imaging solution external staging drawer. The application, including the CBO ROI form, will be stored into the imaging solution person drawer once a Case link is established.

ROI Submission Scenario	Channel	Auto/Manual Process	Imaging Drawer
Customer with a BenefitsCal account and an existing CalSAWS case initiating the ROI from their BenefitsCal dashboard for a county where they have an existing case	ROI API	Auto	Person drawer
Customer with a BenefitsCal account, no existing case and submitting on application with an ROI	ROI API	Manual	External staging drawer

2.8.3 Partner Integration Testing

Yes

2.8.4 Execution Frequency

Real-Time web service

2.8.5 Key Scheduling Dependencies

N/A

2.8.6 Counties Impacted

CalSAWS counties

2.8.7 Category

N/A

2.8.8 Data Volume/Performance

N/A

2.8.9 Interface Partner

BenefitsCal and Hyland

2.8.10 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.9 ForgeRock - CBO Organization API

2.9.1 Overview

CalSAWS will create a new webservice with ForgeRock that will allow CalSAWS to retrieve a CBO's information for the worker based on the customer's program selection on the Select Community Based Organization Search page.

2.9.2 Description of Change

1. Update the 'Select Community Based Organization Search' and 'Select Managers & Assisters for Medi-Cal' page to support the new webservice with ForgeRock. The following information will be displayed on the corresponding pages:
   a. On the 'Select Community Based Organization Search' page display the ~~Agency/~~Organization Name.
   b. On the 'Select Managers & Assisters for Medi-Cal' page display:
      i. CBO Manager – The CBO Manager(s) first and last name associated to the CBO.
      ii. Assister – The selected individual(s) first and last name associated to a Community-Based Organization. **Note**: This field is only for the Medi-Cal program.

   Note: ForgeRock system will maintain the active CBO agreements with the State and/or Counties.
2. Add a new 'Verified' field for Organization in ForgeRock. This new field will indicate the CBO has a valid agreement with the State or County stored and saved in ForgeRock.

3. When CalSAWS makes a call through the new CBO-Organization API, ForgeRock will do the following sequence:
    a. Get access token
    b. Get list of verified Organization names with corresponding Global Unique identifiers (GUIDs).
    c. Execute a search for all active users with the organization GUID selected and return the following information:
        i. GUID
        ii. Given Name (First Name)
        iii. SN (Last Name)
        iv. Role (Manager, Assister)

2.9.3 Partner Integration Testing

Yes

2.9.4 Execution Frequency

Real-Time web service

2.9.5 Key Scheduling Dependencies

N/A

2.9.6 Counties Impacted

CalSAWS counties

2.9.7 Category

N/A

2.9.8 Data Volume/Performance

N/A

2.9.9 Interface Partner

ForgeRock

2.9.10 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.10 CBO - Case Details API

2.10.1 Overview

The Case Details – CBO API is a RESTful webservice that will allow the Self-Service Portal to retrieve a customer's case information for the CBO user based on the customer's CBO ROI form in CalSAWS.

2.10.2 Description of Change

1. Create a RESTful Case Details – CBO API to pull selected case information from Release of Information Detail page when provided the CBO/CBO Manager/Assister GUID and ROI Id in the GET method.
    a. Use date of signature as the begin date when pulling case information.
    b. Only send the primary applicant's case information to CBO when the following criteria are met:
        i. The ROI record for customer/county/CBO combination in CalSAWS is in an 'Approved' status and the end date of the ROI is not reached.
        ii. Do not send data to CBO for the following:
            1. If there is a high-dated Customer Privacy record for the Primary Applicant on the case.
            2. If the Primary Applicant has a Minor Consent case. Minor Consent case is a MC program with aid codes 7M, 7N, 7P, & 7R.
        iii. Data elements to send to CBO include the following:

Data Element	Program	Share Case History with CBO?	Description
Notices of Action (NOAs)	CalFresh, CalWORKs, Medi-Cal	No	Any NOAs associated to the customer generated between the ROI signature date and the current date, up until the ROI expiration date or the effective date the ROI is revoked.

Data Element	Program	Share Case History with CBO?	Description
			Per SCERFRA 22-524, history of NOAs will not be released to a CBO/Assister. **Note**: The CBO – Notices API will be invoked to pull the list of NOAs for the CBO from all the cases for the Customer, in the county where they are the Primary Applicant for CalWORKs, CalFresh, and/or Medi-Cal programs.
Verification Requests from your County Worker	CalFresh, CalWORKs, Medi-Cal	No	Any Verification Request(s) generated by the worker between the ROI signature date and the current date, up until the ROI expiration date or the effective date the ROI is revoked. The verification requests include CSF 103, CW 2200, and MC 355 associated to customer. Per SCERFRA 22-524, no history of verification requests will be shared to a CBO/Assister. **Note**: The CBO – Notices API will be invoked to pull the list of Verification Request for the CBO from all the cases for the customer, in the county. Verification Requests sent via Messages are not included
Benefit Award	CalFresh, CalWORKs	Yes	The issuance payment amount and issuance date will be shared to CBO Manager. The issuance information shared will be based on the ROI Signature date' and/or the 'Case History Time Period'. When 'The past 60 days' is selected, pull benefit award

Data Element	Program	Share Case History with CBO?	Description
			information 60 days from the Signature date to the current date. This information will be displayed on the CBO's Self-Service Portal account.
Program Status	CalFresh, CalWORKs Medi-Cal	No	The current status of the program will be shared to the CBO. **Note**: No history for program status is available. The program status to be viewed by a CBO will be the current program status for the program.
Termination Reason	CalFresh, CalWORKs, Medi-Cal	Yes	The reason and effective date for the program's discontinuance and/or denial. When 'The past 60 days' is selected, pull Termination reason information from the prior 2 months from the Signature date to the current date. This information will be displayed on the CBO's Self-Service Portal account. **Note**: Case Inquiry API will be updated to send this data to the Customer
Upcoming SAR 7 and Renewal Due Dates	CalFresh, CalWORKs, Medi-Cal	No	The due date for upcoming SAR 7 and Renewal/Recertification/Redetermination for the associated program. **Note**: SAR 7 submit month = Due month

2.10.3 Partner Integration Testing

Yes

2.10.4 Execution Frequency

Real-Time web service

2.10.5 Key Scheduling Dependencies

N/A

2.10.6 Counties Impacted

CalSAWS counties

2.10.7 Category

N/A

2.10.8 Data Volume/Performance

N/A

2.10.9 Interface Partner

BenefitsCal

2.10.10 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.11 Update the Case Inquiry API

2.11.1 Overview

The Case Inquiry API is a RESTful webservice that retrieves case information in CalSAWS and sends the information to the Self-Service portal. As part of the CBO ROI form requirements, CalSAWS will need to send Termination reasons to the Self-Service portal.

2.11.2 Description of Change

1. Update the Case Inquiry API to return the Termination reason(s) and effective date associated to the individual's case when they exist for BenefitsCal supported programs.
    a. Send Program status reasons for programs that have been Discontinued, Denied, Deregistered, and Deferred.
    b. Send the following to BenefitsCal:
        i. Termination date – the effective date of the program termination.
        ii. Termination reason – the program status reason description for the program.
2. Update the Case Inquiry API to retrieve the final benefit issuance amount for the month and not return any duplicate amounts for the month.

2.11.3 Partner Integration Testing

Yes

2.11.4 Execution Frequency

Real-Time web service

2.11.5 Key Scheduling Dependencies

N/A

2.11.6 Counties Impacted

CalSAWS counties

2.11.7 Category

N/A

2.11.8 Data Volume/Performance

N/A

2.11.9 Interface Partner

BenefitsCal

2.11.10 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.12 CBO - Notices API

2.12.1 Overview

The CBO - Notices API is a RESTful webservice that will allow the Self-Service Portal to retrieve a list of notices associated to a customer for the CBO and allow the CBO to view the document.

2.12.2 Description of Change

1. Create a RESTful CBO - Notices API similar to the existing Notices API, that will allow CalSAWS to retrieve list of documents for an authorized CBO associated to a customer's GUID per Program within a county in the first GET method. The API will only send the document list to an authorized CBO by program. For example, a CBO for Medi-Cal will not be able to view a customer's CalFresh NOAs.
    a. Notices of Action:
        i. Confirm ROI authorization before pulling the list of Customer's NOAs for the CBO. This will be indicated on the CBO ROI form or ROI Detail page, in the 'Notices of Action (NOAs)' checkbox as selected.
        ii. Pull the list of NOAs generated for the Primary Applicant of the program between the Signature Date of the ROI, and the current date. The documents returned will be from the last 6 months from current date. Do not pull historical NOAs generated prior to the date the ROI was signed and approved.
    b. Verification Requests:
        i. Confirm ROI authorization before pulling list of Customer Verification Requests for the CBO. This will be indicated on the CBO ROI form or ROI detail page in the 'Verification Request' checkbox as selected.
        ii. Pull the list of verification requests (CSF 103, CW 2200, and MC 355) associated to Primary Applicant generated between the Signature Date, of the ROI, and the current date. Do not pull historical Verification Requests generated prior to the date the ROI was signed and approved.

c. Example: ROI signed on 01/02/2023 where customer selects to share 'Notices of Action' with a CBO for 365 days. Any NOAs generated prior to 01/02/2023 will not be sent to the CBO. When CBO view NOA list on 08/01/2023, they will only be able to view NOAs generated from 02/01/2023 (6 months from current date).

2. The second GET method will retrieve the imaged documents given the document identifier and case number. The county code passed to the File Service API will be derived from the identifier.

2.12.3 Partner Integration Testing

Yes

2.12.4 Execution Frequency

Real-Time web service

2.12.5 Key Scheduling Dependencies

N/A

2.12.6 Counties Impacted

CalSAWS counties

2.12.7 Category

N/A

2.12.8 Data Volume/Performance

N/A

2.12.9 Interface Partner

BenefitsCal

2.12.10 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.13 Create a New Batch job for an Expired ROI

2.13.1 Overview

A ROI record will have an end date that will be automatically calculated by the System based on the Signature date and the selected 'Length of Information Access with a CBO' on the Release of Information Detail page. The length of access value can have a numeric value up to 365 (calendar days).

2.13.2 Description of Change

1. Create a new batch job to automatically update the ROI status to 'Expired' based on the end date or expiration date. An ROI record's end date will be calculated by the System based on the applicant's/recipient's signature date and the 'Length of Information Access with a CBO' field.
   a. Status = Approved
   b. ROI End date is equal to the batch date. If the batch date falls on a Sunday or CalSAWS holiday, then the batch job will set the ROI status to 'Expired' on the next CalSAWS business date during the nightly batch.

   For example: An ROI record in County 19 with signature date 12/05/2022 with '90 days' selected for 'Length of Information Access with a CBO''. The end date is generated by the System as 03/05/2023 (*Sunday*). The batch job will automatically set the status of the ROI record to 'Expired' on 03/06/2023 during the nightly batch process.

   c. Create a Journal entry for the case with details when an ROI record status is set to 'Expired'. The end date of the ROI record is determined by the System based on the date of Signature and the 'Length of Information Access with a CBO' indicated on the CBO ROI form.
      i. Person Name: The individual's First and Last name listed on the CBO ROI form.
      ii. CBO Name: The CBO name listed on the CBO ROI form.
      iii. ROI Status: The 'Expired' status of ROI

Journal Entry	Description
New/Update	Yes
Journal Category	Interfaces

Journal Entry	Description
Journal Type	~~Self-Service~~ Self Service
Short Description	CBO ROI Form Expired
Long Description	The CBO ROI form for {Person Name} with Organization: {CBO Name} has {ROI Status}.
Trigger Condition	When the ROI record end date is prior or equal to the batch date.

c. Create a BSCR to schedule this new batch job to run daily Monday – Saturday.

2.13.3 Partner Integration Testing

No

2.13.4 Execution Frequency

Schedule this job to run daily Monday – Saturday on CalSAWS business days.

2.13.5 Key Scheduling Dependencies

N/A

2.13.6 Counties Impacted

CalSAWS counties

2.13.7 Category

N/A

2.13.8 Data Volume/Performance

N/A

2.13.9 Interface Partner

BenefitsCal

2.13.10 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.14 Adding New ABCDM 229 Form

2.14.1 Overview

This form will be used to authorize Community-Based Organizations (CBOs) access a customer's information in BenefitsCal.

State Form: ABCDM 229 (01/23)

Programs: CalWORKs, CalFresh, Medi-Cal

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All Counties

Languages: English and Spanish

2.14.2 Form Verbiage

Create Form XDP

Create a new XDP for the new CBO ROI form.

Form Header: CalSAWS Standard Header Coversheet (CSF 147)

Form Title (Document List Page Displayed Name): Applicant/Recipient Authorization for Release of Information to CBO in BenefitsCal

Form Number: ABCDM 229

Include NA Back 9: No

Imaging Form Name: Release of Information ABCDM 229

Imaging Document Type: Authorized Rep and Release of Info

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #1

2.14.3 Form Variable Population

The coversheet header will be populated with the standard case information if generated in the context of a case from the Template Repository.

There is no variable population required for the body of the form.

2.14.4 Form Generation Conditions

1. **Add Form to Template Repository**

   This form will be added to the Template Repository.

   Required Document Parameters: Case Number, Customer Name, Language, Program

2. **Add Form Control**

   The following barcodes will be applied to this form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. **Add Form Print Options and Mailing Requirements**

   The following print options for the form are as follows:

Blank Template	Print Local Without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	N	Y	N

Mailing Requirements:

Mail-To (Recipient): The person selected from the Customer Name dropdown from the Document Parameters

Mailed From (Return): Sending Office

Mail-back-to Address: None

Outgoing Envelope Type: Standard Flat Mail

Return Envelope Type: None

Additional Requirements:

Special Paper Stock: None

Enclosures: None

Electronic Signature: No

Electronic Signature (IVR/Text): No

Check to Sign: No

Post to Self Service Portal (SSP): Yes

2.15 Automated Regression Test

2.15.1 Overview

Create new regression test scripts based on the system test scenarios for the permanent functional changes outlined above.

2.15.2 Description of Change

1. Evaluate each system test scenario for the potential of automation. Known exclusionary criteria:
    a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
    b. Technical limitations (ex., visual comparison of a static document against a template)
    c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
    d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
    a. Repeatability: The script must be able to execute multiple times between data refreshes
    b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario

2.16 Hyland Imaging Updates

2.16.1 Overview

This section will outline the necessary modifications to allow the new CBO ROI form to be viewed in the Hyland Imaging system.

2.16.2 Description of Change

1. For Imaging system 'View', return the document type 'ABCDM 229 - Applicant/Recipient's Authorization for Release of Information to Community-Based Organization (CBO) in BenefitsCal'. This will navigate the user to the Hyland Imaging system and display all the imaged CBO ROI forms for the primary applicant.

2. Create a new helper method in the 'View' URL to retrieve images for all the cases for an individual within a County.

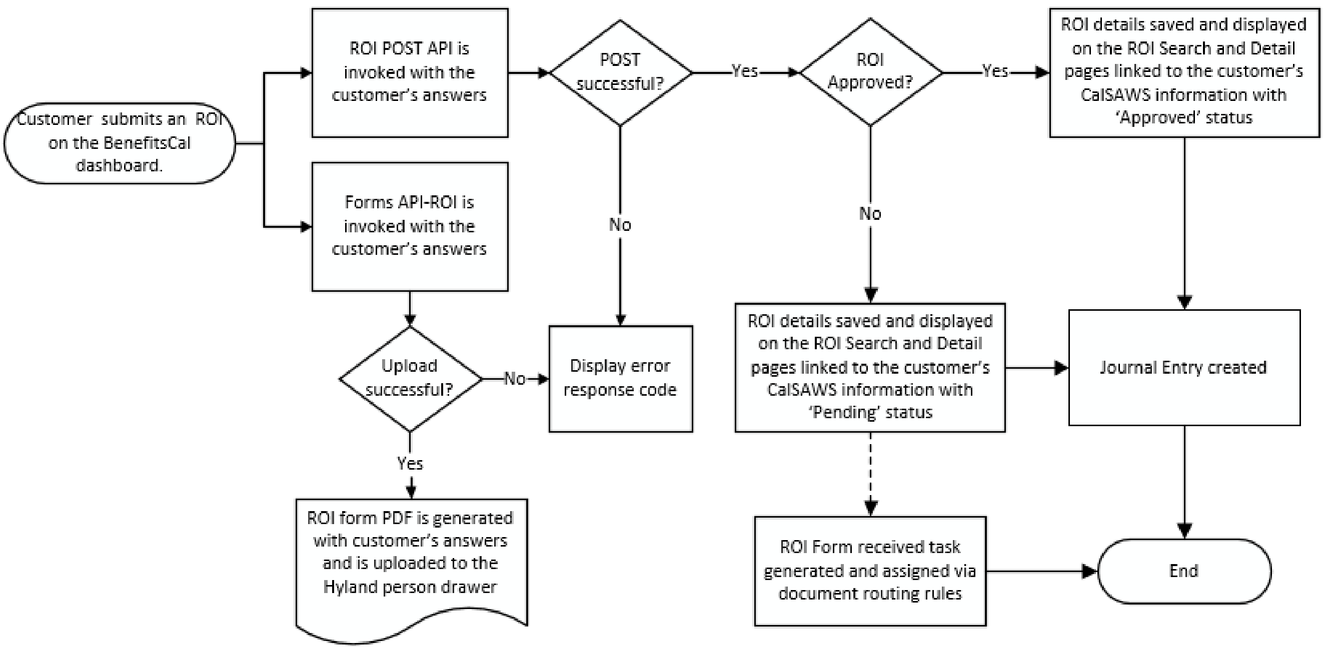
3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interface	This attachment will contain the Release of Information (ROI) API data field mappings.	ROI API field Mapping.xlsx
2	Interface	ROI-API YAML	ROI-API.yaml
3	Interface	ROI-API HTML	ROI-API.html
4	Interface	Forms – API YAML	CalSAWSFormsAPI.yaml
5	Interface	Forms – API HTML	CalSAWSForms.html
~~6~~	~~Interface~~	~~CBO-OrgAPI YAML~~	~~CBO-OrgAPI.yaml~~
~~7~~	~~Interface~~	~~CBO -OrgAPI HTML~~	~~CBO-OrgAPI.html~~
~~8~~ 6	Interface	CBO-Case Details YAML	CBO-Case Details.yaml
~~9~~ 7	Interface	CBO-Case Details HTML	CBO-Case Details.html
~~10~~ 8	Interface	CBO-Notices YAML	CBO-Notices.yaml
~~11~~ 9	Interface	CBO-Notices	CBO-Notices.html
~~12~~ 10	Interface	Case Inquiry YAML	CaseInquiry.yaml
~~13~~ 11	Interface	Case Inquiry HTML	CaseInquiry.html
~~14~~ 12	Online (Security)	Security Matrix	CA-247709 Security Matrix.xls

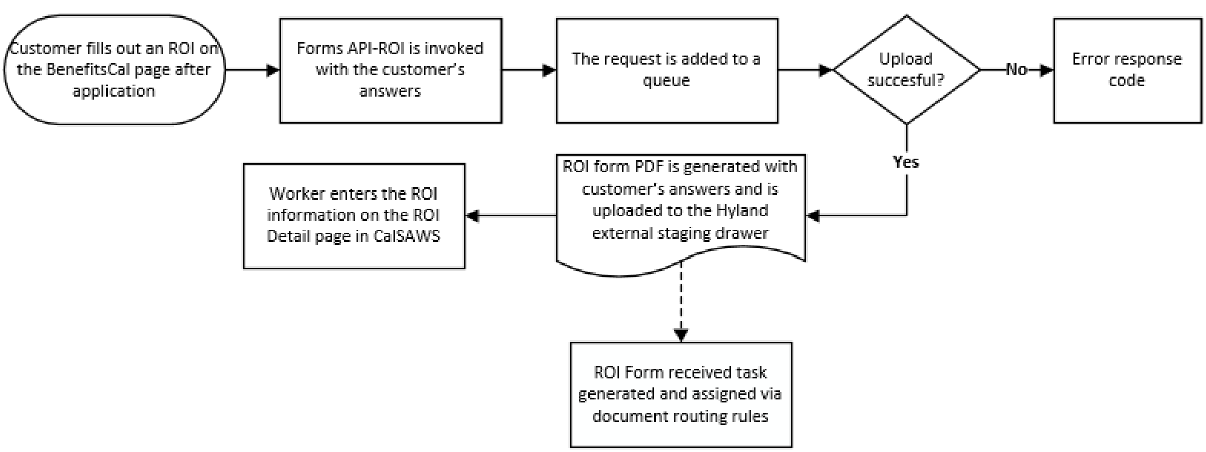
4 APPENDIX

1. Release of information API process flow – The ROI submission process can occur through various channels (digital form, document upload, or paper submission). The diagrams below depict the process flow of the CBO ROI form submission.

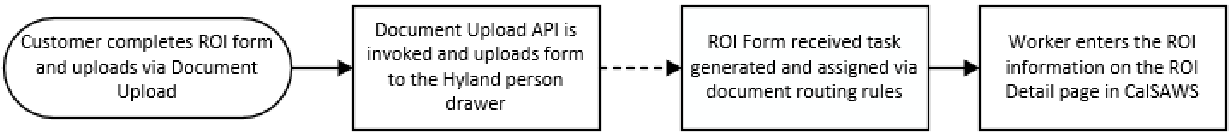
a. Customer initiated ROI – Existing CalSAWS case and BenefitsCal account



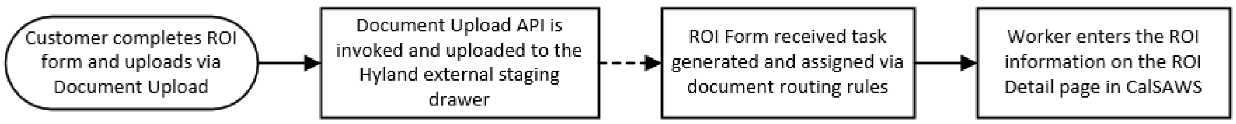
b. Customer initiated ROI – No existing CalSAWS case with a BenefitsCal account – Applying for benefits (Manual Process)



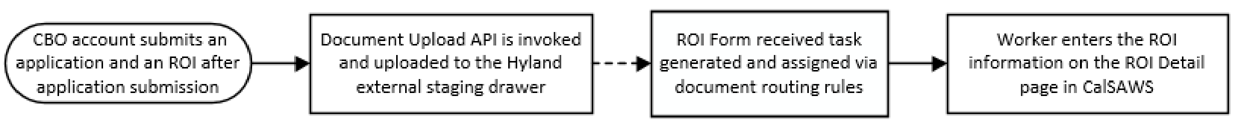
c. Customer initiated ROI – Upload CBO ROI form from BenefitsCal account via Document Upload



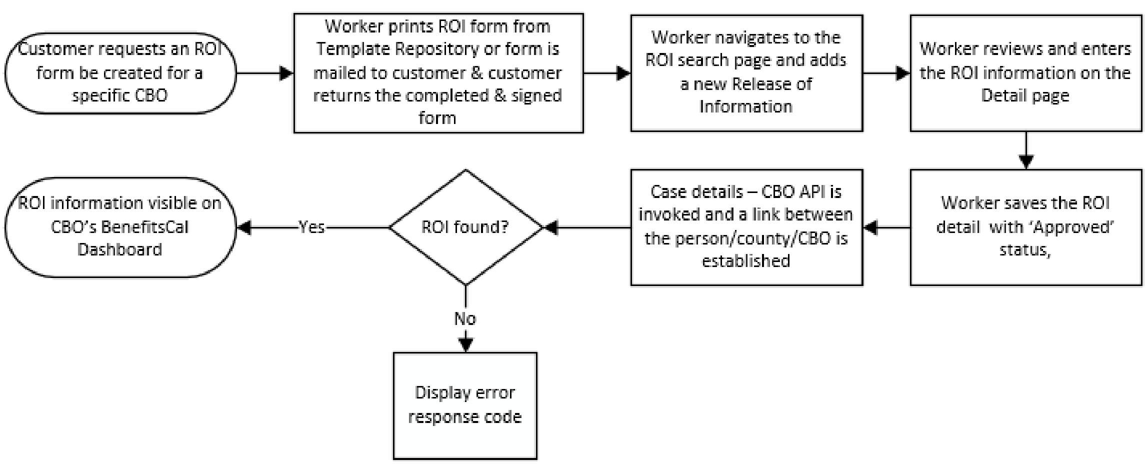
d. Customer initiated ROI – As an Anonymous user and uploads CBO ROI form after application submission



e. CBO initiated ROI – ROI form submitted after application submission via their CBO account in BenefitsCal through Document Upload API



f. County Worker initiated ROI – ROI record created upon Customer's Request



CalSAWS

California Statewide Automated Welfare System

Design Document – Content Revision

CA-256840

CalSAWS VA Expansion – Release 3

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gray Guzman
	Reviewed By	Nathali Roizman Lizerbram, Regina Zmuidzinas Aguilar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/16/23	1.0	Original Draft	Gray Guzman
03/16/23	2.0	Content Revision	Uzochi Oparaji

Table of Contents

1 OVERVIEW

1.1 Current Design

The Virtual Assistant (VA) allows CalSAWS workers to access a series of pre-defined questions (use cases) for the CalFresh, Medi-Cal, and CalWORKs programs. These use cases (UCs) are designed to provide workers information on CalSAWS functionalities and instructions on how to perform certain job functions.

The document also includes revisions to the content found on the original document. Revisions are highlighted in yellow.

1.2 Requests

Add more content to the VA and edit previously deployed content.

1.3 Overview of Recommendations

In Release 3 of the CalSAWS VA, we will release additional UCs within the VA and make enhancements to existing content. The scope of this SCR is as follows:

Summary of New Content:

Category	Current Design	Release 3	Total (All Releases)
Number of UCs	62	28	90
Number of Keywords	238	14	252
Main Menu Branch	5	0	5
Sub-Menu Branches	9	3	12

Summary of Enhancements to Existing Content:

Category	Release 3
Number of Edited UCs	~~2~~ 1
New UX/UI Features	0

1.4 Assumptions

1. To chat with the VA, the user would click the orange chat icon in the bottom right corner of the website (shown below).

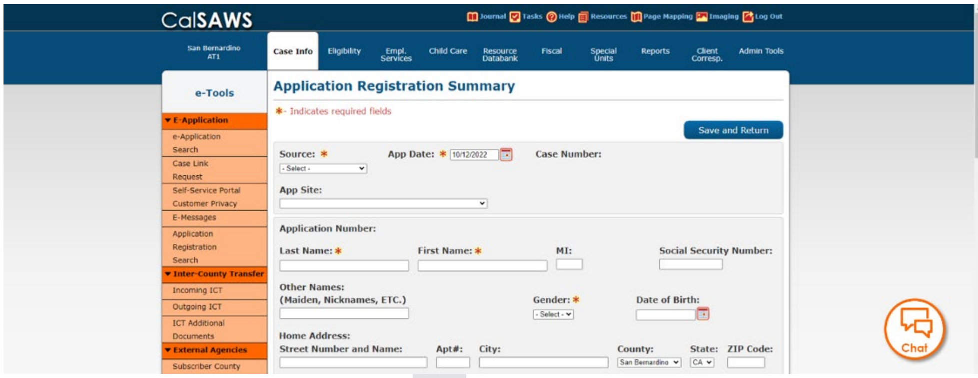


Figure 1.4.1 - VA Chat Icon

2. Once clicked, the VA will open as a pop-up window with the URL: virtualassistant.calsaws.net.

2 RECOMMENDATIONS

2.1 Internal VA Items

2.1.1 Overview

In this release, we will be adding more content to the VA and making enhancements to existing content. This content will include 28 more UCs, 14 new keywords, and 3 new sub-menu branches.

2.1.2 CalSAWS VA Mockups

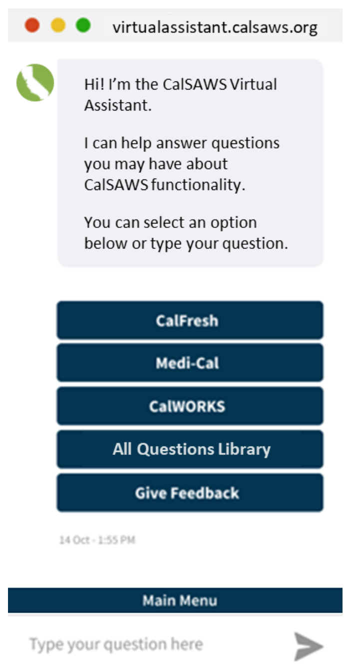


Figure 2.1.2.1 - VA Window

2.1.3 Description of Changes

1. New UCs

Below is a table containing all new UCs in Release 3:

Program	Question	Answer	Buttons
Self-Service Portal sub-menu	How to identify Expedited Service (ES) & Immediate Need (IN) e-Applications?	The e-Application Search page displays an Expedited Service (ES) / Immediate Need (IN) column. The code(s) displayed are as follows: • ES – Displays if applicant potentially qualifies for ES • IN – Displays if applicant potentially qualifies for IN • ES/IN – Displays if applicant is potentially eligible for ES and IN • No – Displays if applicant did not request or did not answer the ES or IN questions Note: Every application should be screened for Expedited Services even if it displays a "No" code.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to search for e-applications?	You can access the e-Application Search by placing your cursor over **Case Info** on the Global navigation bar and selecting **e-Tools** from the **Local** navigator. To search for an e-Application: 1. Go to the **e-Application Search** page 2. Enter the appropriate search criteria 3. Click the **Search** button	**Button:** e-Application Search (OLH) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to process a Case Link Request from Self-Service Portal?	Customers may link their Self-Service Portal (SSP) account to their case through the SSP. Case link requests occur automatically if there is a 100% information match. If there is not a 100% information match, the user must manually complete the process. To learn more about how to process a case link request, click the button below.	**Button:** Self-Service Portal (SSP) - Case Link Requests (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to reject a Case Link Request from the Self-Service Portal?	There are various reasons for why Counties may consider rejecting a Case Link Request. Possible scenarios may include:	**Button:** Self-Service Portal (SSP) - Case Link Requests (JA)

		• Any of the associated cases have an active Children Services program • The Primary Applicant has an active Customer Privacy record • The individual requesting the Case Link is not actually the Primary Applicant on any program To learn more about how and when to reject a case link request, click the button below.	**Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to link an e-Application to a case for a customer in the System?	You may link an e-Application (e-App) for customers after they complete and submit an application through the Self-Service Portal. Note: For customers unknown to the system, please follow your County's guidance on file clearance before linking. While an e-App is in "data transfer" status, you cannot link a second e-App to that case. Click the button below for instructions on how to link an e-App to a case for a customer known and unknown to the System.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to unlink an e-Application from a case in the system?	You may unlink an e-Application (e-App) from a case if you linked an e-App to the incorrect case. To unlink, you must repeat the steps to link the e-App to the correct case. The e-App will then show as linked to the new/correct case and disappears from the case to which it was originally linked. Note: You can only unlink an e-App while it is in "Data Transfer" status. Click the button below to learn more about how to link an e-App to the correct case.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** Link e-Application to a Case **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to add a Customer Privacy Record?	Customers may not want their case information to be sent to their Self-Service Portal (SSP) account for various privacy reasons. The Customer Privacy Record is used to prevent case data from being sent to the SSP.	**Button:** Self-Service Portal (SSP) Customer Privacy (JA) **Button:** More Self-Service

		Note: Adding a Customer Privacy record does not make the case confidential in the System. Click the button below for steps on how to add a Customer Privacy Record to a case.	Portal-related Topics
Self-Service Portal sub-menu	How to end date a Customer Privacy Record?	End dating a customer privacy record will allow the System to send all case data and available documents to the Self-Service Portal (SSP) for customer viewing. Customers requesting case information and that their forms/NOAs be available through their SSP account (after a customer privacy request was processed) can have their customer privacy record end dated. Click the button below for steps on end dating a Customer Privacy Record.	**Button:** Self-Service Portal (SSP) Customer Privacy (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to process a Re-Evaluation / Recertification / Redetermination submitted through the Self-Service Portal?	Customers can complete and sign their Re-Evaluations (RE) from their Self-Service Portal (SSP) account. CalSAWS uses the data to populate the RE form(s) and uploads the form to the Imaging system. The Imaging system updates the Customer Reporting Detail page to show the RE has a status of "Received". Click the buttons below for more information on how to process a RE.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** Recertification Process **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to navigate to the Self-Service Portal Customer Privacy Page?	You may add a Customer Privacy record to a case to prevent case data from being sent to the Self-Service Portal (SSP). To access the SSP Customer Privacy page: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **e-Tools** from the **Local** navigator 3. Click **Self-Service Portal Customer Privacy** from the **Task** navigation bar 4. On the **Select Person** page	**Button:** Self-Service Portal (SSP) Customer Privacy (JA) **Button:** Add Customer Privacy Record **Button:** End Dating a Customer

		a. Enter the Case Number or Person information b. Click the **Search** button c. Select the **Primary Person** on the Case	Privacy Record **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to unlink Primary Applicant from a Self-Service Portal Account?	Only under certain circumstances can users with the appropriate security rights unlink a Primary Applicant from a Self-Service Portal (SSP) account. When a Primary Applicant is unlinked from their SSP account all associated cases are unlinked as well. Click the button below for detailed instructions on how to unlink a Primary Applicant from SSP account.	**Button:** Self-Service Portal (SSP) - Case Link Requests (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to transfer customer data from the Self-Service Portal into CalSAWS?	Data the customer enters in the Self-Service Portal (SSP) populates the data collection pages. Review all information submitted by the applicant on all appropriate data collection pages. Information submitted by an applicant is indicated by the e-Data icon on the list and detail pages. You can accept or reject e-Data information for each field or drop list, as necessary. Note: Customer data transfer only applies to e-Applications. When a customer submits a renewal or a report-a-change (RAC), the data will not transfer. In these cases, the user will need to look at the imaged document. For step-by-step instructions on how to transfer customer data in the Self-Service Portal, click the button below.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to assign or re-assign an e-Application in the Self-Service Portal?	To assign/re-assign an e-Application, start from the Case Summary page for the linked e-Application. 1. Click the **Expand** caret in the **Self-Service Portal** page section. Select the **e-App Number** hyperlink for the most current e-Application.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** More Self-Service

		2. On the **e-Application Summary** page: Click the **Edit** button. Click the **Select** button under the **Assigned Worker Name** field in the **Assigned Worker Information** page section. 3. On the **Select Worker** page: Enter the appropriate search information and click the **Search** button. 4. Click the radio button for the appropriate worker. Click the **Select** button. 5. On the **e-Application Summary** page: Click the **Assign** button. Click the **Close** button.	Portal-related Topics
Self-Service Portal sub-menu	How to send an e-Message?	The e-Message functionality allows all Counties to send e-Messages to the customer's Self-Service Portal (SSP) account, regardless of whether they opted in or out of two-way messaging. To send an e-Message, the customer must have created an SSP account. Customers may be sent an email notification when they receive an e-Message on their SSP account. In order to receive email notifications, a customer must opt-in to e-Notifications and provide a valid email address. Note: Only workers with the appropriate security rights to access the e-Message Detail page can send an e-Message. Follow your County's policy regarding e-Messages. To access the e-Messages pages: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **e-Tools** from the **Local** navigator 3. Click the **E-Messages** link on the **Task** navigation bar Click the button for detailed instructions on how to send an e-Message.	**Button:** Self-Service Portal (SSP) - e-Messages (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to respond to an e-Message?	When a Self-Service Portal (SSP) customer sends an e-Message, the worker, based on County policy, can respond to the customer through the e-Messages pages.	**Button:** Self-Service Portal (SSP) - e-Messages (JA)

		To access the e-Messages pages: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **e-Tools** from the **Local** navigator 3. Click the **E-Messages** link on the **Task** navigation bar Click the button for detailed instructions on how to respond to an e-Message.	**Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to request an action from the customer?	Workers can request information or verifications from the customer or send forms to the customer to complete and return through the e-Messages pages. To access the e-Messages pages: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **e-Tools** from the **Local** navigator 3. Click the **E-Messages** link on the **Task** navigation bar Click the button for detailed instructions on how to request an action from the customer.	**Button:** Self-Service Portal (SSP) - e-Messages (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to close an e-Message Action?	When a response is received from the customer, workers may update the e-Message status to Action Completed. To access the e-Messages pages: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **e-Tools** from the **Local** navigator 3. Click the **E-Messages** link on the **Task** navigation bar Click the button for detailed instructions on how to close an e-Message Action.	**Button:** Self-Service Portal (SSP) - e-Messages (JA) **Button:** More Self-Service Portal-related Topics
Referrals sub-menu	How to create referrals?	You may create referrals on the Referrals site. To create the referral: 1. Place the cursor over **Empl. Services** on the **Global** navigation bar 2. Click the **Supportive Services** link from the **Local** navigator	**Button:** Referrals – Manage (JA) **Button:** More Referrals-related Topics

		3. Click the **Needs** link in the **Task** navigation bar 4. After filling out the fields on the **Need Detail** page: a. Select **Indicated** from the **Status** drop list b. Select **Documented** from the **Status Reason** drop list c. Select **Referral** from the **Save & Add New** drop list 5. On the **Referral Detail** page: a. Confirm the radio button for the appropriate need is selected b. Click the **Select** button under **Provider** 6. After filling out the fields on the **Select Service and Provider** page: a. Click the **Search** button b. Click the radio button for the appropriate Provider c. Click the **Select** button 7. After filling out the fields on the **Referral Detail** page: a. Click the **Save and Return** button	
Referrals sub-menu	How to edit referrals?	You may edit referrals on the Referrals site. To edit the referral: 1. Place the cursor over **Empl. Services** on the **Global** navigation bar 2. Click the **Supportive Services** link from the **Local** navigator 3. Click the **Referrals** link in the **Task** navigation bar 4. Click the **Edit** button for the appropriate referral on the **Referrals List** page 5. After filling out the fields on the **Referral Detail** page: a. Click the **Save and Return** button	**Button:** Referrals – Manage (JA) **Button:** More Referrals-related Topics
Referrals sub-menu	How to remove referrals?	You may remove referrals on the Referrals site. To remove the referral: 1. Place the cursor over **Empl. Services** on the **Global** navigation bar 2. Click the **Supportive Services** link from the **Local** navigator 3. Click the **Referrals** link in the **Task** navigation bar 4. On the **Referrals List** page:	**Button:** Referrals – Manage (JA) **Button:** More Referrals-related Topics

		a. Click the check box for the appropriate referral b. Click the **Remove** button	
Referrals sub-menu	How to access IHSS Referrals Search page?	The In Home Supportive Services (IHSS) Referral Search page displays all pending IHSS referrals assigned to a worker. To access the IHSS Referrals Search page: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **Referral** from the **Local** navigator 3. If no data is displayed, click the **Refine Your Search** link and enter new search parameters	**Button:** IHSS Referrals (OLH) **Button:** More Referrals-related Topics
Referrals sub-menu	How to link an IHSS referral to a case in the System?	The In Home Supportive Services (IHSS) Referral Detail page allows users to link a referral to a case in the System and view information sent through the Caseload Management Information and Payrolling System (CMIPS) II interface. Users may access the IHSS Referrals Detail Page from the IHSS Referrals Search page by clicking the IHSS Case hyperlink on the IHSS Referral Search page. Note: Only users with the appropriate security rights can link an IHSS referral to a case. To link an IHSS referral to a case in the System: 1. Click the link to **System Case** button on the **IHSS Referral Detail** page 2. Search for an existing person on the **New Person Search** page. Add a new person or select an existing person on the **New Person Search Results** page Note: When an IHSS applicant has a pseudo Social Security Number (SSN) in MEDS, the CMIPS II system sends zeros for a person's SSN and populates the SSN text box with zeros during the linking process. Remove the zeros and leave the SSN text box blank or enter a valid SSN, if applicable.	**Button:** IHSS Referrals (JA) **Button:** More Referrals-related Topics

		3. Click the **Select** or **Create New Case** button depending upon whether the person being added has an existing System case Note: If the person being added does not have sufficient information to assign a Client Index Number (CIN), they will be added to the case, but no System program is created. Note: For more information on adding a person or creating a case in the System, refer to the "System Establish a Case - Existing Customer" and "The System Establish a Case - New Customer" job aids.	
Referrals sub-menu	How to reject IHSS referrals?	Referrals can be rejected if a user determines that an In Home Supportive Services (IHSS) referral should not be linked to a case in the System. When in edit mode on the IHSS Referral Detail page, clicking the Reject button updates the referral status from Accepted to Rejected. Note: Only users with the appropriate security rights can reject an IHSS Referral. If necessary, a rejected referral can be linked to another case in the System by clicking the Link to System Case button. Doing this will change the referral status from Rejected to Accepted. When a referral is rejected and linked to another System case, the nightly interface sends a transaction to Caseload Management Information and Payrolling System (CMIPS) II notifying them of the new System case number and status of the Medi-Cal or cash-based program. In the event the IHSS referral is not linked to another System case, the System will reject all future CMIPS II interface transactions as the IHSS referral is no longer known to the System.	**Button:** IHSS Referrals (JA) **Button:** More Referrals-related Topics

Task Management sub-menu	How to add tasks?	You can create a task using **Tasks** on the **Utilities** navigation bar or using the **Worklist** page. To add a task using **Tasks** on the **Utilities** navigation bar, you need to know the case number or be in the context of a case. Click the button below for detailed instructions on how to add tasks.	**Button:** Task Management (JA) **Button:** More Task Management -related Topics
Task Management sub-menu	How to reassign tasks?	To reassign a single task, you can edit the task and update the associated Worker and/or Bank, using the Task Search page. Several tasks can be reassigned at the same time using the Task Search page. Tasks may be reassigned through an overnight batch process according to the criteria entered on the Task Reassignment Detail page. Note: When a task is added, it is associated to a specific Worker ID and/or Bank ID. The Worker ID associated may be either the Worker ID associated to the program or a specific Worker ID associated to the task. An assigned task can be reassigned to another Worker and/or Bank at any time. Once a task is completed or expired, it cannot be edited or reassigned. For more detailed instructions, click the button below.	**Button:** Task Management (JA) **Button:** More Task Management -related Topics
Task Management sub-menu	How to search tasks?	The Task Search page allows workers to search for newly assigned tasks, overdue tasks, and for a specific Category, Task Type, or priority. To access the Task Search page: 1. Click **Tasks** on the **Utilities** navigation bar 2. Click the **Task Search** tab to access the **Task Search** page Note: A case number is required when searching for All tasks or Completed tasks. If the User needs to search for completed tasks, they may generate the On-Request Task	**Button:** Task Management (JA) **Button:** More Task Management -related Topics

		Report with the appropriate security rights. For additional information on searching for a task, click the link below.	
Task Management sub-menu	How to edit tasks?	You can edit Tasks by clicking on **Edit** next to the task on the **Task Search** page or the **My Tasks** page. 1. The **Task Detail** displays as an overlay when you click on the **Edit** button or the **Due Date** hyperlink to view a task 2. After you click **Save** or **Save and Return** on the **Task Detail** overlay, the task displays on the **Task Search** page and the **My Tasks** page with the updated information Click the button below for further detailed instructions on how to edit tasks and to see which Task Detail fields are editable.	**Button:** Task Management (JA) **Button:** More Task Management -related Topics
Task Management sub-menu	How to complete tasks?	Users can complete a task once the action required by that task is completed. Tasks can be cleared one at a time by using any one of the following methods: 1. Click the **Complete** button on the **My Tasks** page OR 2. Click the **Edit** button on the **My Tasks** page to access the **Task Detail** page • Select **Complete** from the **Status** drop-down box • Click the **Save and Return** button OR 3. Click the **Complete** button on the **Task Search** page OR 4. Click the **Edit** button on the **Task Search** page to access the **Task Detail** page • Select **Complete** from the **Status** drop-down box • Click the **Save and Return** button	**Button:** Task Management (JA) **Button:** More Task Management -related Topics

2. Edited UCs

Below is a table containing all edited UCs in Release 3. Text highlighted signals edits:

Program	Question/Title	Answer	Buttons
Free Response	Help Response	I'm sorry for not answering your question, I'm still learning and may have an answer in the future. ~~Please~~ For additional assistance, please ask your supervisor or assigned support staff so that they can escalate, as necessary.	
~~CalWORKs, CalFresh, Medi-Cal~~	~~How to complete an electronic signature?~~	~~Electronic Signature is a method of capturing a participant's signature or intent through electronic options rather than signing a physical piece of paper.~~ ~~For step-by-step instructions on how to complete an electronic signature, click the Electronic Signature (e-Sign) (JA) button below. For more information on forms that require a telephonic / electronic signature, click the Forms Overview button below.~~ ~~Note: The Forms Overview Online Help guides are updated with each major release; forms with priority release will not be in the Form Overview.~~	~~**Button:** Electronic Signature (e-Sign) (JA)~~ ~~**Button:** CalSAWS Forms Inventory~~ ~~**Button:** Forms Overview (OLH)~~ ~~**Button:** More CalWORKs-related Topics~~ ~~**Button:** More CalFresh-related Topics~~ ~~**Button:** More Medi-Cal-related Topics~~

3. New Keywords

Below is a table containing all new Keywords in Release 3:

UC #	Title	Keywords
UC FR.14	Self-Service Portal Sub-Menu	SSP, self-service portal, e-Message, emessage, Case Link Request, case link
UC FR.16	Referrals Sub-Menu	Referrals, IHSS, In Home Supportive Services, CMIPS II, cmips, Caseload Management Information and Payrolling System

UC FR.17	Task Management Sub-Menu	task management, tasks

4. **New Sub-Menu Branches**
   Release 3 we will include several new sub-menu branches that will bucket keywords into a sub-menu.

   These new sub-menu branches are:
   1. Self-Service Portal
   2. Referrals
   3. Task Management

2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
~~1~~	~~Design~~	~~Release Tracker~~	~~WFRelease_3_Tracker_2.16.xlsx~~
2	Design	Miro Board – VA flow and UCs are documents	VirtualAssistant_Release3.pdf
3	Design	Release Tracker – Content Revision	VirtualAssistant_Release3Tracker-Content Revision

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.2.1	5. The LRS shall include Show me how to features, coaches, and expert systems along with What's this? activation to facilitate User access to more detailed online Help functions.	The VA is an included coach and expert system.

5 OUTREACH

N/A

6 APPENDIX

N/A