



Fact Sheet: **Customer Reporting and Document Uploads through the Self-Service Portal**

The purpose of this fact sheet is to clarify how reporting documents submitted through the Self-Service Portal impact the customer and the CalSAWS. Additionally, this document encourages counties to create tasks to bring more timely awareness of uploaded documents.

Document Availability in the Self-Service Portal

Customers with an active BenefitsCal (Self Service Portal) account are notified when a Redetermination/Renewal/Recertification (RE) or SAR 7 reporting document is due. These documents are available for completion through the BenefitsCal pages. The customer answers the questions and submits the information to CalSAWS.

A PDF of the SAR 7 or RE form is generated and uploaded to the Hyland Imaging Solution.

- If the form is a SAR 7, then the Customer Report Page is updated with a Status of Received.
- An RE will be marked Received on the Customer Reporting page. The imaged documents are viewable by the CalSAWS User. If the county sets up a Document Routing Rule for these types of forms, the Imaging Solution will pass a task request to CalSAWS.
 - The information on the RE will display in the customer's dashboard once it is picked up through the batch process. The batch process runs hourly from 8am – 5pm, Monday-Saturday. For example, a customer may create a BenefitsCal account in the morning and shortly thereafter be notified they have an RE that is due.

Document Uploads via the Self-Service Portal

A customer may choose to upload their completed SAR 7 or RE form to CalSAWS via the Document Upload functionality on their Self-Service Portal Dashboard. The Customer selects the type of form they are uploading, uploads the document, and the document is uploaded directly to the Imaging Solution in CalSAWS. This results in customers sometimes selecting an incorrect document type and therefore, REs may display in Imaging under a type other than 'RE'.

SAR 7s submitted via the BenefitsCal document upload will automatically update the Customer Reporting List page to a Received Status.

Medi-Cal REs submitted via the BenefitsCal document upload will automatically update the Customer Reporting List page Status when the customer uploads a document identified as MC Redetermination.



Other REs submitted via the BenefitsCal document upload will not automatically update the Customer Reporting List page Status. County users will need to manually update an RE's Status to Received.

Although BenefitsCal will nudge the customer to complete the information within the Self-Service Portal pages, it is a customer's prerogative to upload documents as they choose.

Customer Reporting Common Scenarios

Customers may:

- Complete the SAR 7 or RE online via their Self-Service Portal account
- Upload the completed form via their Self-Service Portal Account
- Mail or hand the completed form to the County Welfare Department (CWD)

Facts:

- All documents completed in BenefitsCal update the Customer Reporting Detail page
- SAR 7 and Medi-Cal REs automatically update the reporting status on the Customer Reporting Detail page
- Other REs and other reporting documents submitted via document upload **DO NOT** automatically update the reporting status on the Customer Reporting Detail page
- Medi-Cal Renewals completed through BenefitsCal pages will generate as the MC 216 or MC217 forms
- Customers may complete a single upload for various forms and verifications
- Customers often choose an incorrect document type

How Counties can be prepared and react timely to these common scenarios

Related specifically to the RE packet uploads provided in this fact sheet, CalSAWS recommends creating tasks that specifically relate to renewals.

Doc Types include:

- RE
- Renewal

Some counties currently have tasks set up for these Doc Types, however, most do not. Tasks can assist workers with identifying uploaded Renewals so that they can be processed timely.



Counties can set up tasks to notify workers when documents are available for viewing. In CalSAWS under the County Administrative pages, the county may set up Document Routing Rules, which will automatically trigger a task in CalSAWS when uploaded documents are received by the Hyland Imaging Solution.

Advantages of setting up an automated task for imaged documents

- Worker is immediately notified when a document has been received for a program/case
- Worker can quickly identify if a reporting document/RE has been received and update the Customer Reporting Detail page to prevent automated negative actions
- Tasks can be set up for receipt of document types as well as specific forms

Note: The task that generates is dependent on the document type a customer selects upon uploading a document.

Setting up Tasks

The steps to create a Task include:

- Create a Task Type
- Create/Configure a Document Routing Rule
- Link the Task Type to the Document Routing Rule

Create a Task Type

Creating a Task Type allows the county to specify the type of task they want created. Example: e-Application File Clearance. Navigation to Task Type List page:

Admin Tools > Admin > Tasks > Task Type.

Note: Task Types created to be used by Automated Actions must have the "Available for Automation" checkbox selected.



Task Type Detail

*- Indicates required fields

Save and Return Cancel

Task Type Information

Name: * <input type="text"/>	Category: * - Select -	Priority: Medium
Available Online: <input type="checkbox"/>	Available for Automation: <input type="checkbox"/>	
Instructions: <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>		
Expire Tasks: * - Select -		
Newly Assigned Indicator: * Tasks display indicator for <input type="text" value="5"/> day(s)		

▶ Sub-Type Information

▶ Append Information

▶ Action Step Information

▶ Resulting Task Information

▶ Staff Classification Information

Save and Return Cancel

Setting up Task Type allows the county to:

- specify the name of task
- select a task category
- make it available for automation
- add special instructions
- set up append instructions
- detail action steps
- add an expiration date

Note: Counties may refer to the Task Management – Admin job aid, in Online Help for step-by-step instructions for creating a Task Type.



Admin
Flag
County Announcement
County Authorizations
County Benefit Issuance Thresholds
County Security Roles
Disaster Services
▼ Automated Actions
Document Routing
MEDS Alert Admin
Task Admin

Once the Task Type is created, the Document Routing Rule can be created in the Automated Actions section in the Task Navigation bar.

Document Routing Rule List

► Refine Your Search

Search Results Summary	Results 1 - 25 of 26
	1 2 Next
Add Document Routing Rule	

To create a new document routing rule, click the “Add Document Routing Rule” button. To edit details for an existing document routing rule, click the Edit button. These buttons, in addition to the Name hyperlink, will navigate to the Document Routing Rule Detail page.

Document Routing Rule Detail

* - Indicates required fields

Save And Return Cancel

Name: *

Status: Active ▼

Created By:
Dymas Pena

Notes:



The county will create a Name for the Document Routing Rule on the 'Document Routing Rule Detail' page.

After creating the Document Routing Rule Name, the county will select the type of document(s) that will trigger the rule (create a task).

The county may also choose to add specific forms.

Select Form

When clicking the Add button within the Additional Form(s) section the User is navigated to the Select Form page where they can search for the forms needed. Each form may only be associated to one "Active" Document Routing Rule.

After adding all the triggers, the county is now ready to link the Task Type created earlier to the Document Routing Rule. Select a Due Date and where the task should be assigned. Assignment can be based on Program Based Rule(s) or to a specified Task Bank.



Document Routing Rule Program Detail

*- Indicates required fields

Save And Return Cancel

Program Information

Program: *

Program Status:

-Select-
 Active
 Denied
 Deferred
 Deregistered
 Discontinued
 Exempt
 Good Cause
 Ineligible
 Non-Comp
 Pending

- Select -
 CalFresh
 Cal-Learn
 CalWORKs
 CAPI
 CFET
 Child Care
 Foster Care
 General Assistance (Non-Man
 GA/GR Employment Services
 Medi-Cal

Distribution Type: *

- Select -

Sibling Assignment:

No

Save And Return Cancel

If the county chooses 'Program Based Rule(s)' the User is navigated to the 'Document Routing Rule Program Detail' page where program information is selected.

Document Routing Rule List

► Refine Your Search

Search Results Summary		Results 1 - 25 of 96
		1 2 3 4 Next
Add Document Routing Rule		
<input type="checkbox"/> Name	Forms	Status Edit
<input type="checkbox"/> AAP Application	IMG 217: AAP Application	Active Edit
<input type="checkbox"/> AAP Documents	AAP 2: Payment Instructions AAP, AAP 3: Reassessment Info - AAP, AAP 4: Eligibility Certification AAP, AAP 8: AAP Nonrecurring Adoption Expenses Agrmt, FC 8: Federal Eligibility Certification AAP, IMG ...	Active Edit
<input type="checkbox"/> Address / Residency	CW 789: New Residence Requirements, IMG 200: Mail Pick-Up Agreement, IMG 202: Shelter Expense, IMG 203: Utility Expense, MC 212: Medi-Cal Residency Declaration, MC 214: Important Info About Residency	Active Edit
<input type="checkbox"/> Application Documents	IMG 221: Intake Checklist, IMG 222: Program Screening Sheet	Active Edit
<input type="checkbox"/> ARC 1A	ARC 1A - Legacy: ARC Recipient Rights Responsibilities	Active Edit
<input type="checkbox"/> Auth Rep & ROI	ABCDM 228: Applicants Auth. for Release of Info, ABCDM 229: Release of Information ABCDM 229, CF 100: CF Request for AR Drug/Alcohol Resident, CF 101: CalFresh Request for Auth Rep, CSF 117: Auth Rep ...	Active Edit
<input type="checkbox"/> Behavioral Health Documents	IMG 487: Behavioral/Mental Health Form, IMG 496: Mental Health/Substance Abuse Referral, IMG 499: Psychological Test and Evaluations, IMG 500: Psychological Tests, IMG 501: WTW Mental Health and Subst	Active Edit

Once entries are complete and the Document Routing Rule Detail page is saved, it will be listed on the Document Routing Rule List page.