CalSAWS

California Statewide Automated Welfare System

Design Document

CA-247709

Design of Release of Information for CBOs

CalSAWS	DOCUMENT APPROVAL HISTORY	
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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 • Added additional update requirement to Case Inquiry API section	Jennifer Muna, Erika Kusnadi

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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 a 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 will be introducing a form called 'Applicant/Recipient's Authorization for Release of Information to Community-Based Organization (CBO) in BenefitsCal'. This BenefitsCal 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 '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's CBO Release of Information (ROI) in the System. The '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 form, 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 ‘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.

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 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.
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 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) and CalFresh (CF) 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 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 BenefitsCal.
8. The date of signature will be the date used to pull the client case data and sent to BenefitsCal.
9. Any historical NOAs generated before the ROI Signature date will not be returned in the client data shared to BenefitsCal.
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 ROI document type.
17. All existing functionalities will remain unchanged unless called out as part of this SCR.

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 ROI records on the Release of Information Search page.

2.1.2 Release of Information Search – Task Navigation

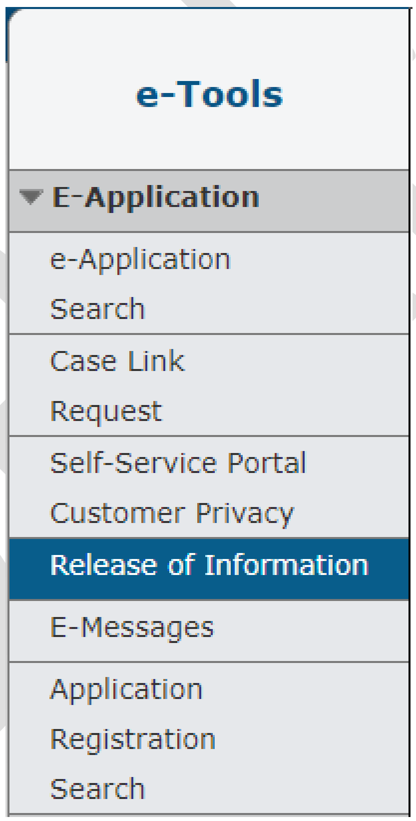
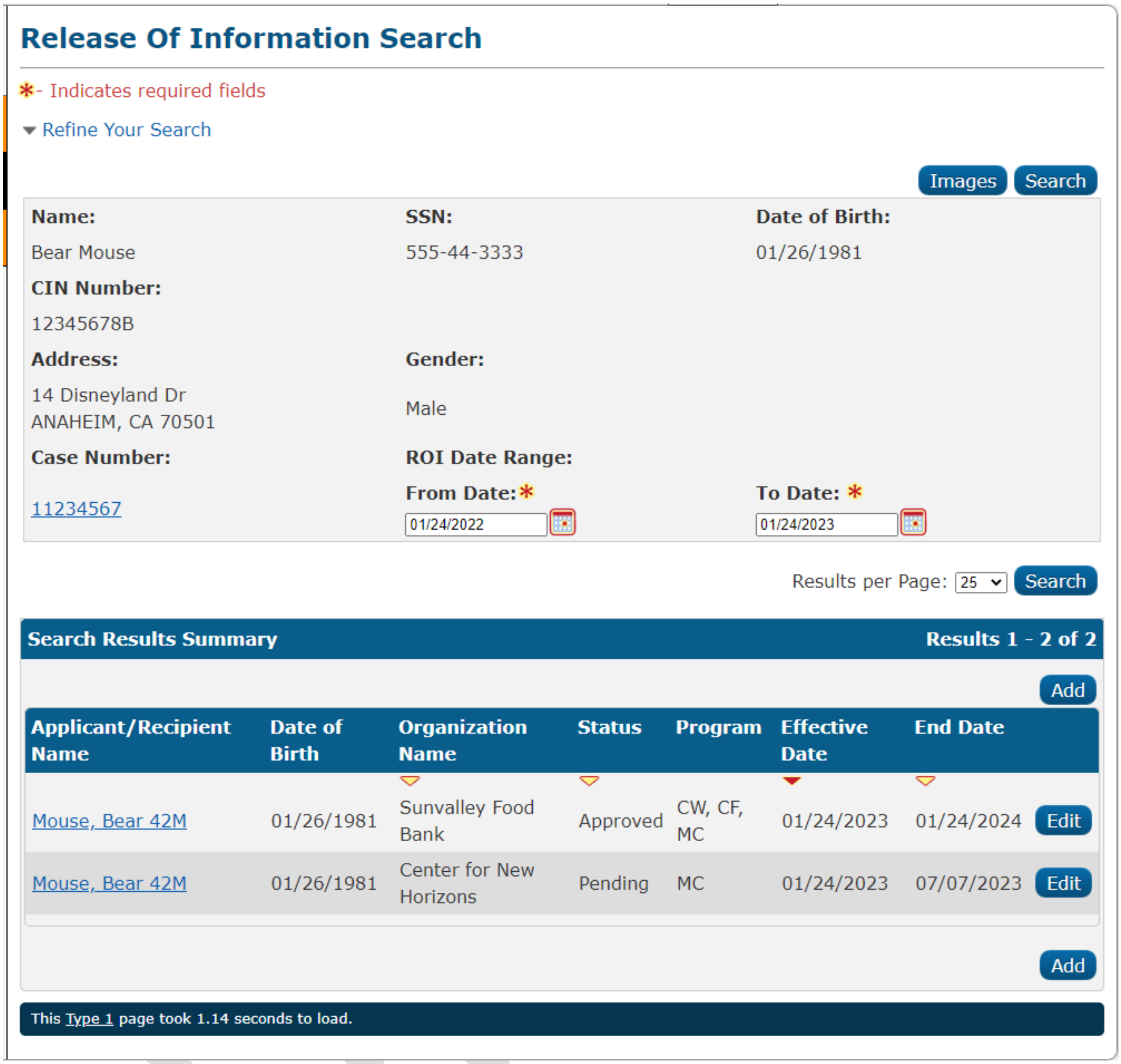


Figure 2.1.2-1 - Release of Information-Task Navigation



Release Of Information Search

*- Indicates required fields

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:* 01/24/2022
To Date:* 01/24/2023

Results per Page: 25 Search

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

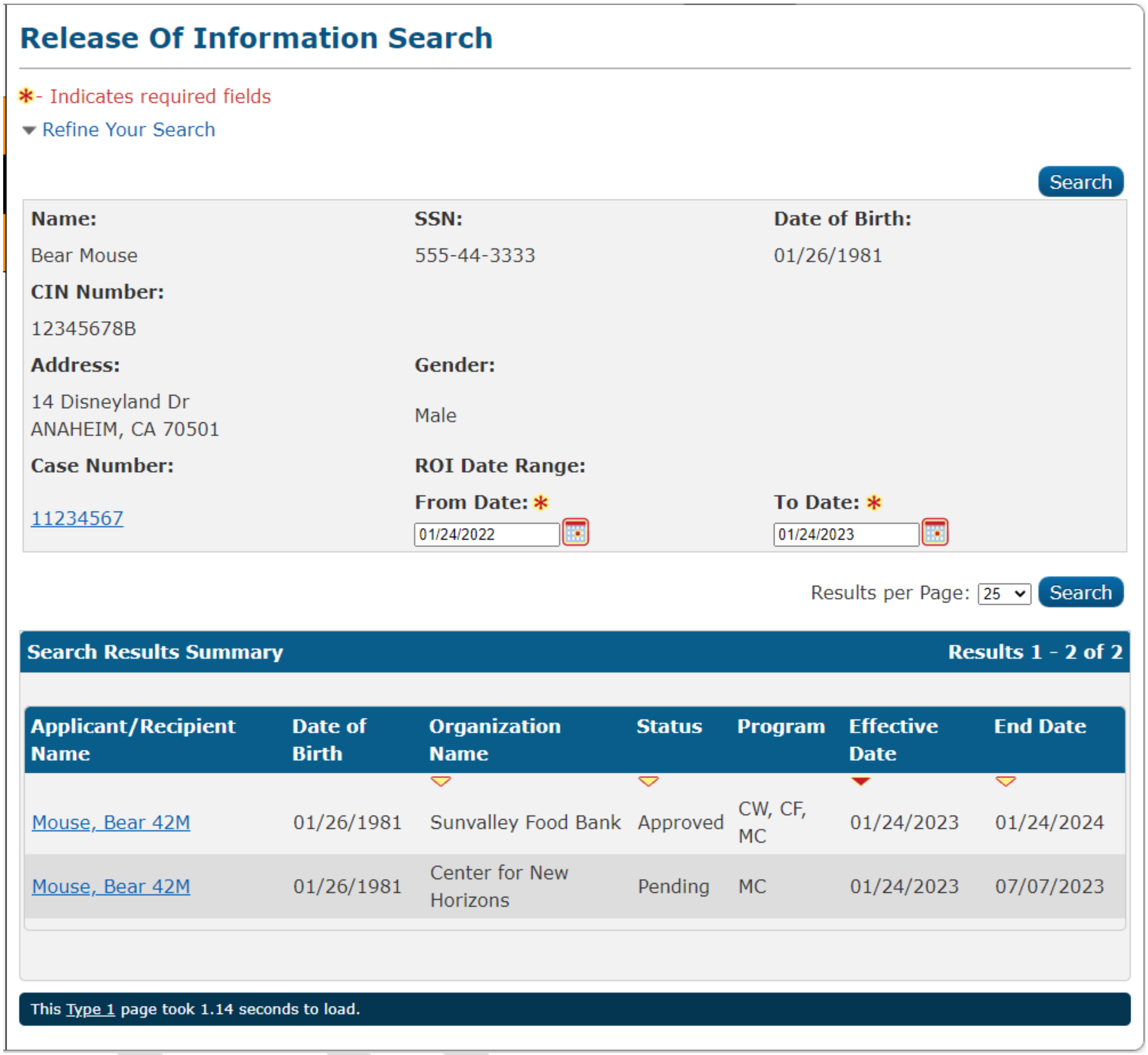
Add

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


Release Of Information Search

*- Indicates required fields

Refine Your Search

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:* 01/24/2022

To Date:* 01/24/2023

Results per Page: 25 Search

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

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
Mouse, Bear 42M	01/26/1981	Center for New Horizons	Pending	MC	01/24/2023	07/07/2023

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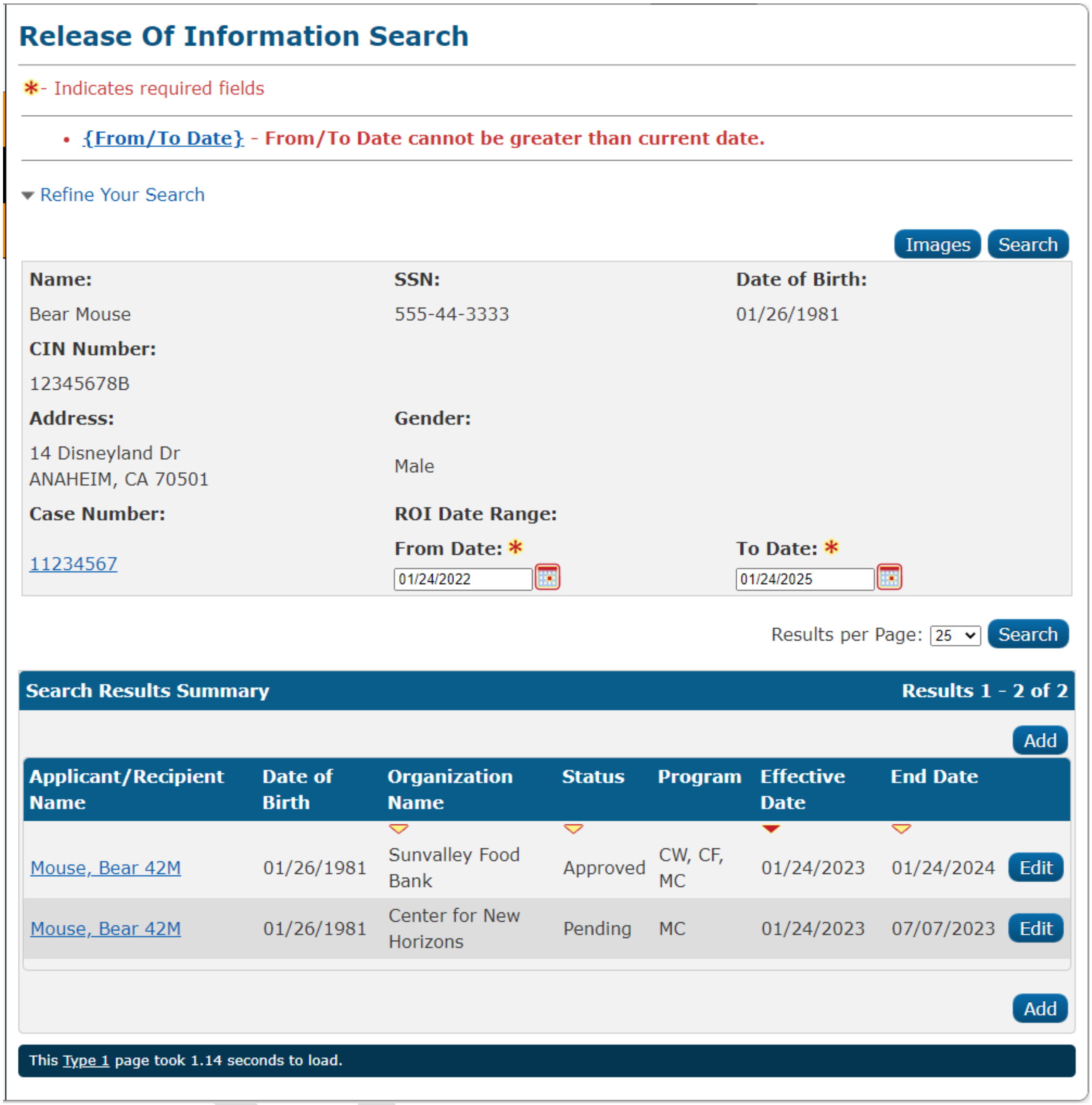
Figure 2.1.2-3 – Release of Information Search Page – No Imaging security right and Edit security right.



Release Of Information Search

*- Indicates required fields

- {From/To Date} - From/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 Number:		
12345678B		
Address:	**Gender:**	
14 Disneyland Dr ANAHEIM, CA 70501	Male	
Case Number:	**ROI Date Range:**	
	From Date: *	**To Date:** *
11234567	01/24/2022	01/24/2025

Results per Page: 25 Search

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

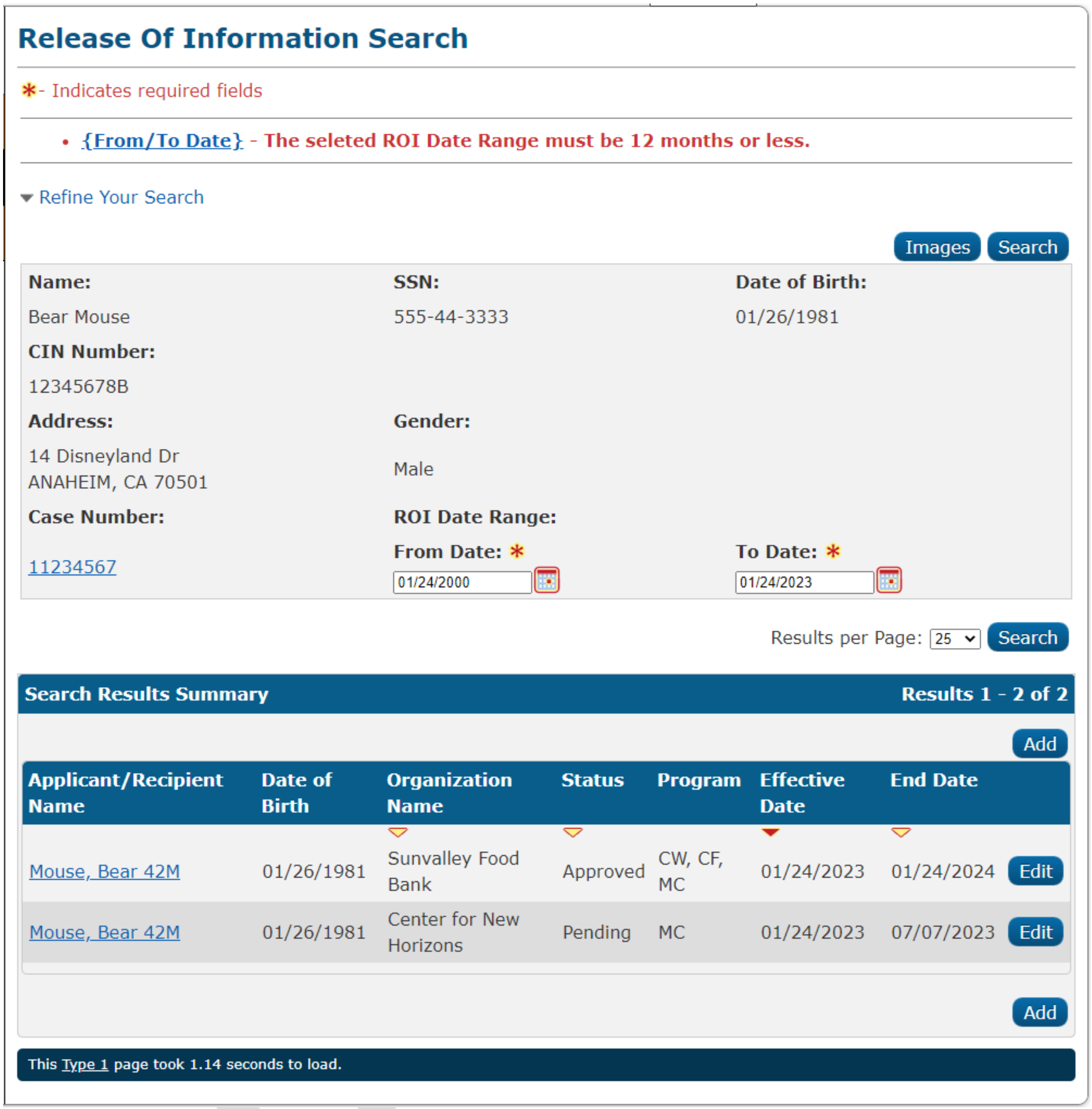
Add

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 2.1.2-4 – Release of Information Search Page – Cannot be greater than system Date Validation



Release Of Information Search

*- Indicates required fields

- {From/To Date} - The seleted ROI Date Range must be 12 months or less.

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: * 01/24/2000
To Date: * 01/24/2023

Results per Page: 25 Search

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

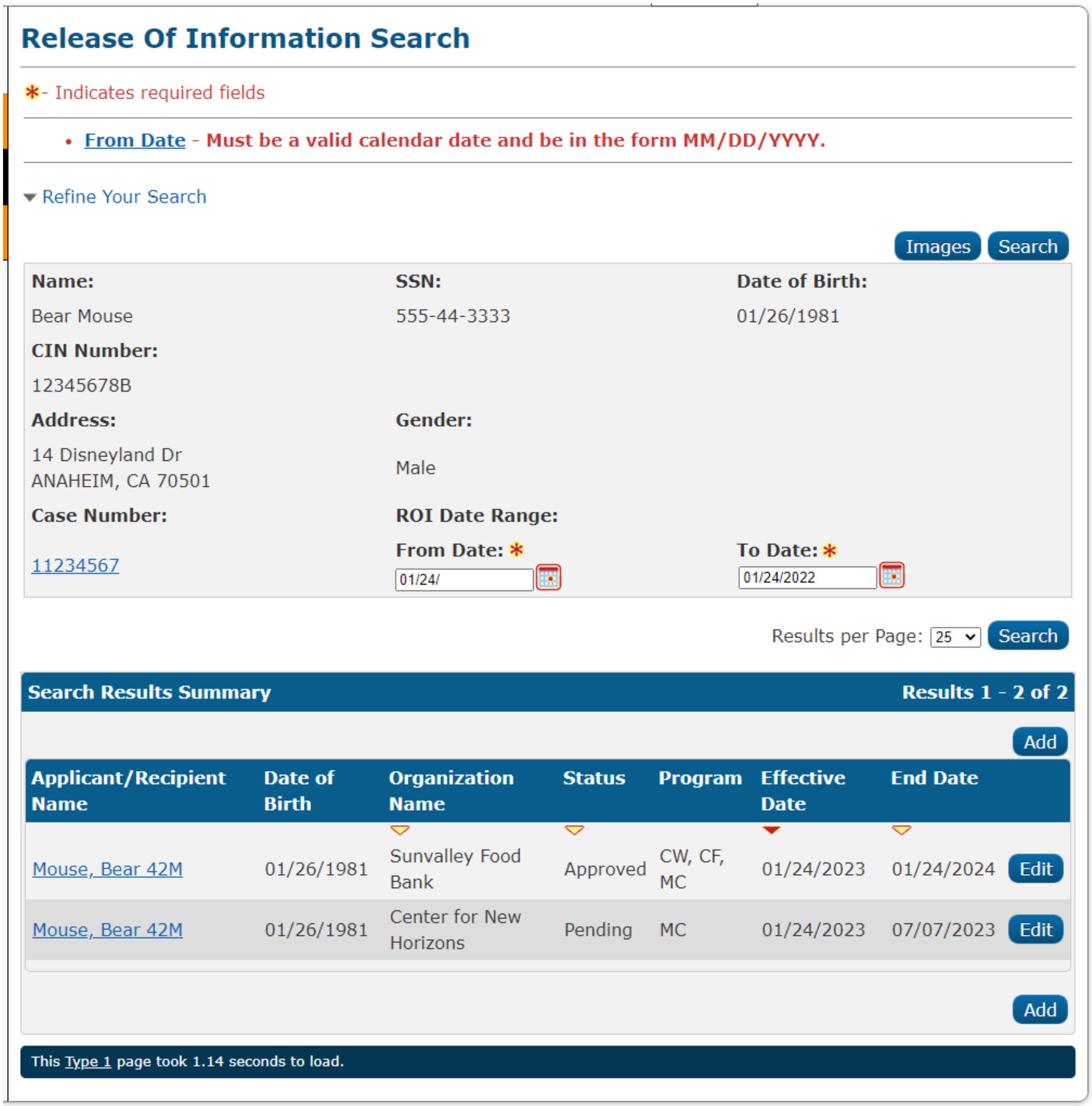
Add

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 2.1.2-5 – 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**

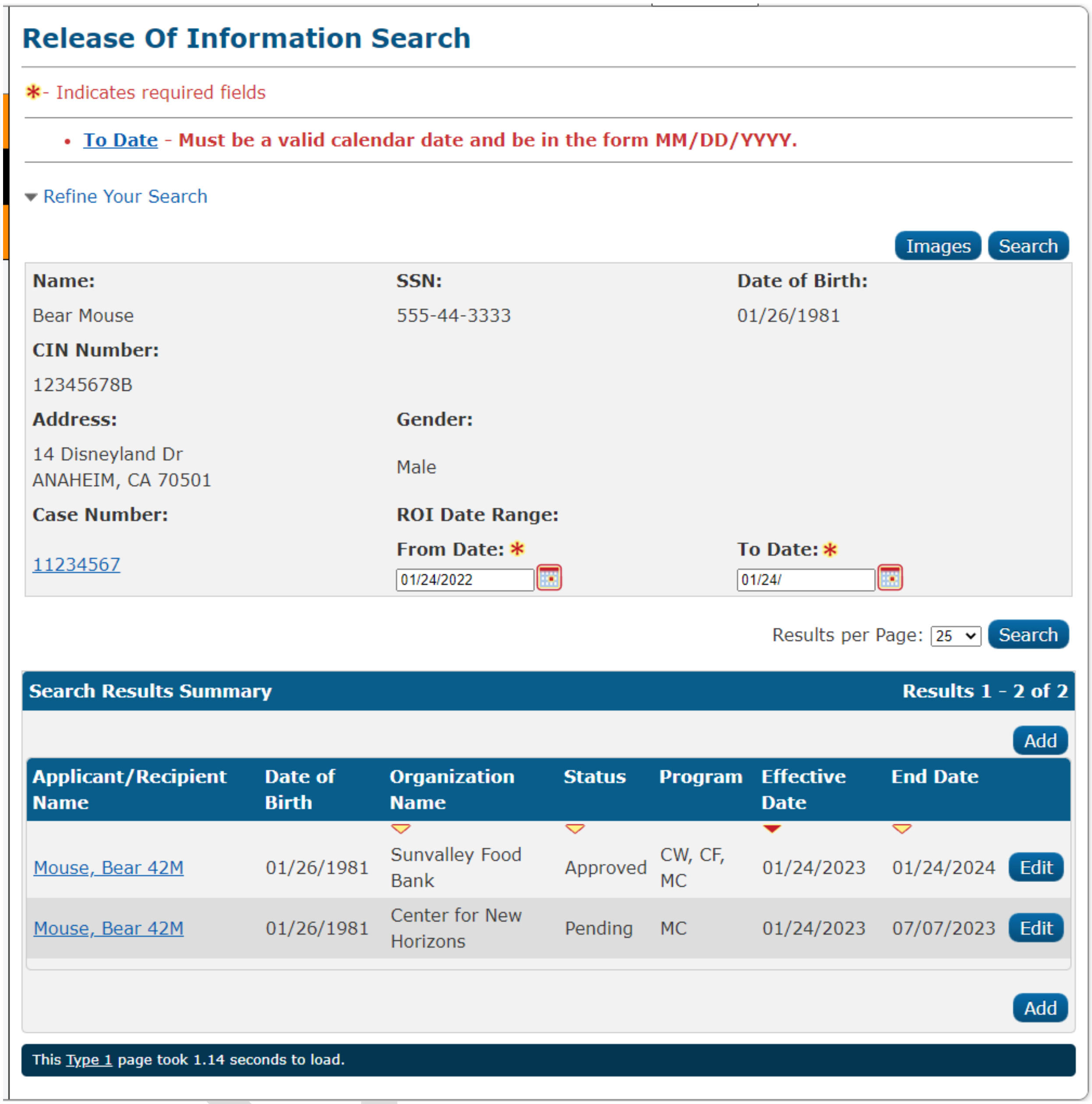
Add

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 need to be in the correct format Validation



Release Of Information Search

*- Indicates required fields

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

Refine Your Search

Images Search

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

Results per Page: 25 Search

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

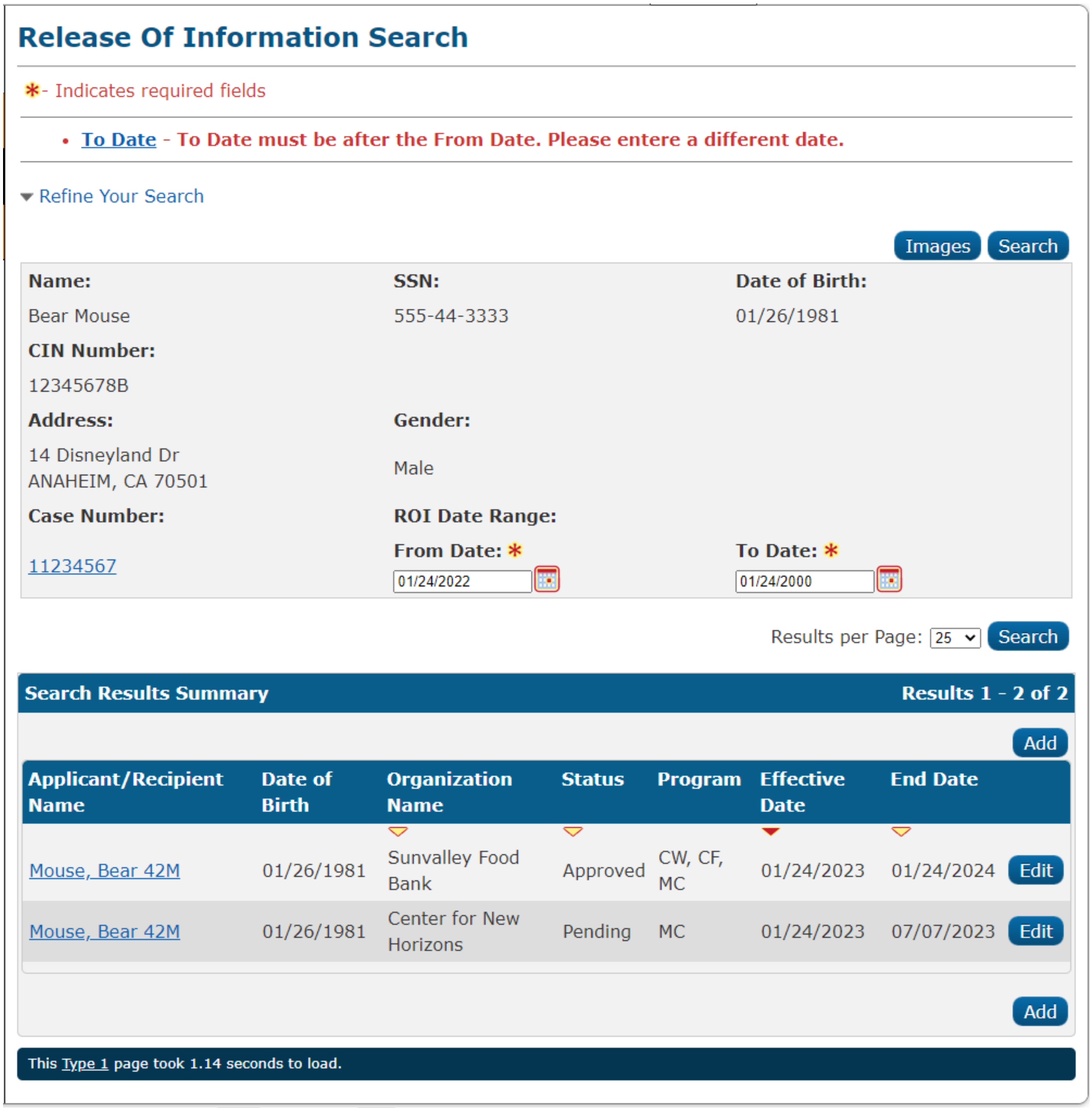
Add

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 2.1.2-7 – Release of Information Search Page – To Date need to be in the correct format Validation



Release Of Information Search

*- Indicates required fields

- To Date - To Date must be after the From Date. Please entere a different date.

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: * 01/24/2022
To Date: * 01/24/2000

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 2.1.2-8 – Release of Information Search Page – To Date need to 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 populate 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 Number
                    i. This field will not be editable and will automatically be populated with the

CIN number 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 Number that the person selected belongs to.
        1. The list of Case Numbers display will only be for cases that belong to the same county that the logged in user belongs to.
        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 if it’s created through BenefitsCal 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 will need to be in the format 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 will need to be in the format 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 hitting the Search button:
   1. From Date – Must be a valid calendar date and be in the form MM/DD/YYYY.
      a. This validation is triggered when 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 form MM/DD/YYYY.
      a. This validation is triggered when 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 value on the To Date is after the From Date
4. {From/To Date} – Date cannot be greater than current date.
    a. This validation is triggered when the From date and/or the To Date is after the current date
5. {From/To} Date – The selected ROI Date Range must be 12 months or less.
    a. This validation is triggered when 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 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 that the ROI record is created for.
        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 ROI record in view mode.
2. Date of Birth
    a. This is a sortable column that 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 display the name of the Community-Based Organization 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 status of the 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 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 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 ROI records that was 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 was created for a 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 on 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	This right will allow the users to view the Release of Information Search and Release of Information Detail pages.	Release of Information View
ReleaseofInformationEdit ReleaseofInformationView	The right allows the users to view & edit the Release of Information Search and Release of Information Detail pages.	Release of Information Edit

Security Group	Group Description	Group to Role Mapping
Release of Information View	This group will allow the users to view the Release of Information Search and 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	The group allows the users	Eligibility Staff, Eligibility Supervisor

Security Group	Group Description	Group to Role Mapping
	to view & edit the Release of Information Search and Release of Information Detail page.	

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 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 users 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. If the ROI is initiated by the CBO, the worker will be able to create a CBO ROI in CalSAWS. 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

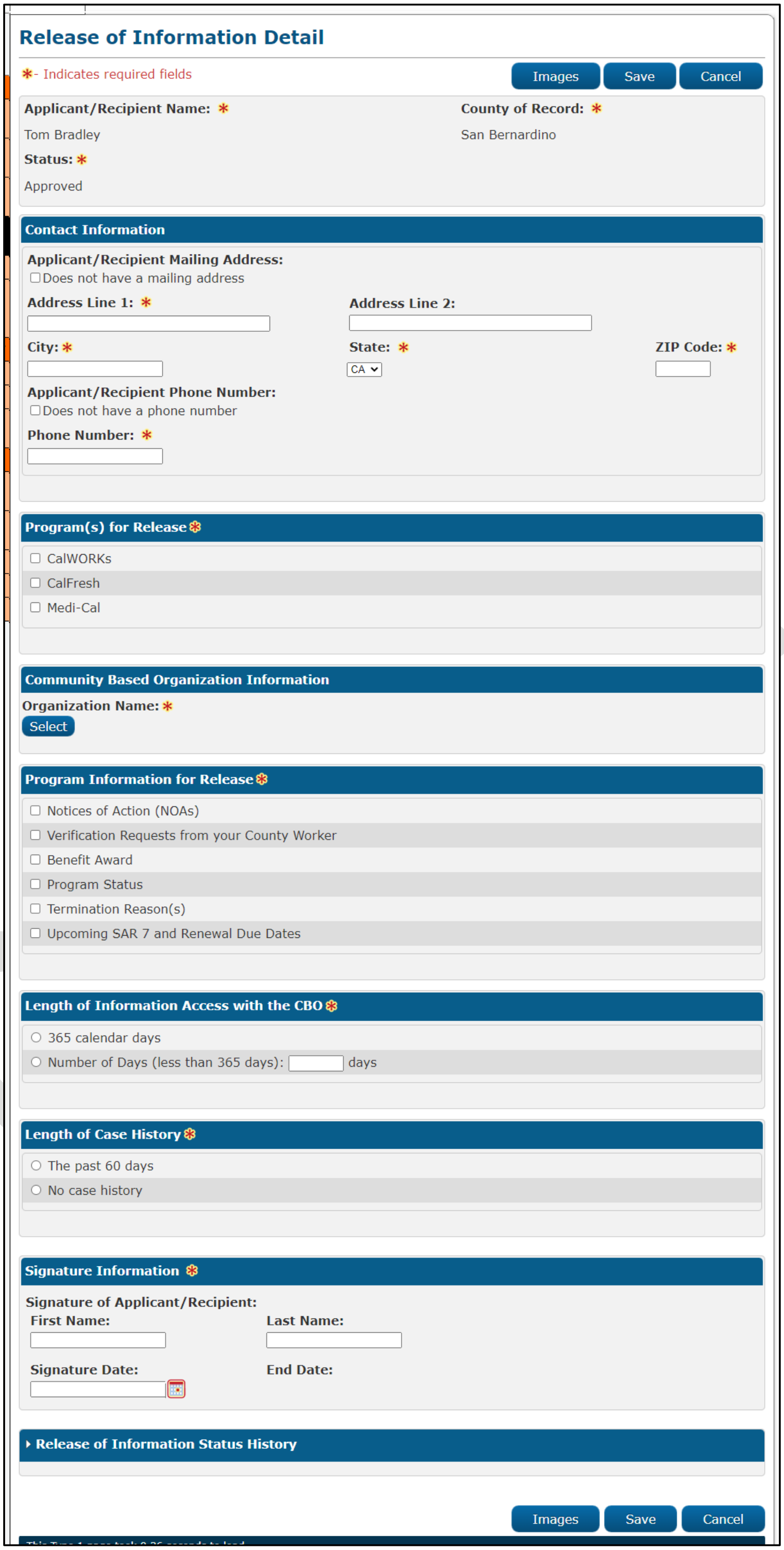


Figure 2.2.2-1 – Release of Information Detail Page – (Create Mode – Upon loading)

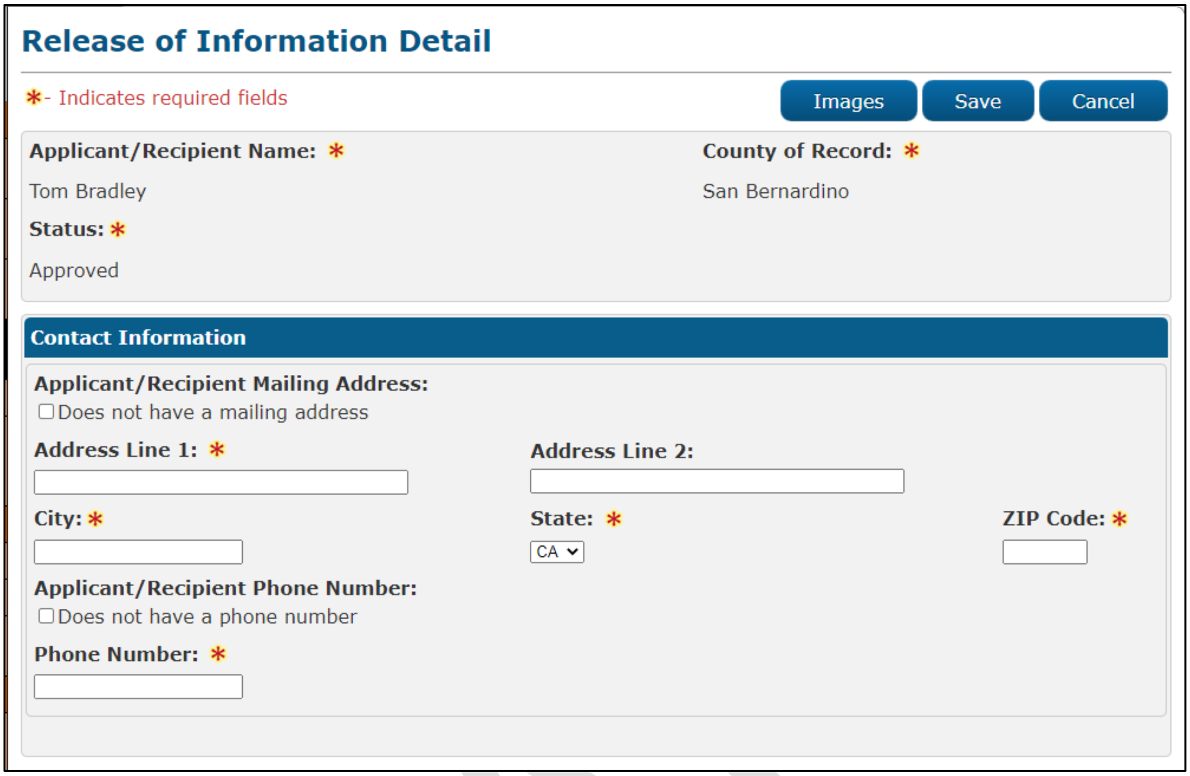


Figure 2.2.2-2 – Release of Information Detail Page – (Create Mode 1)

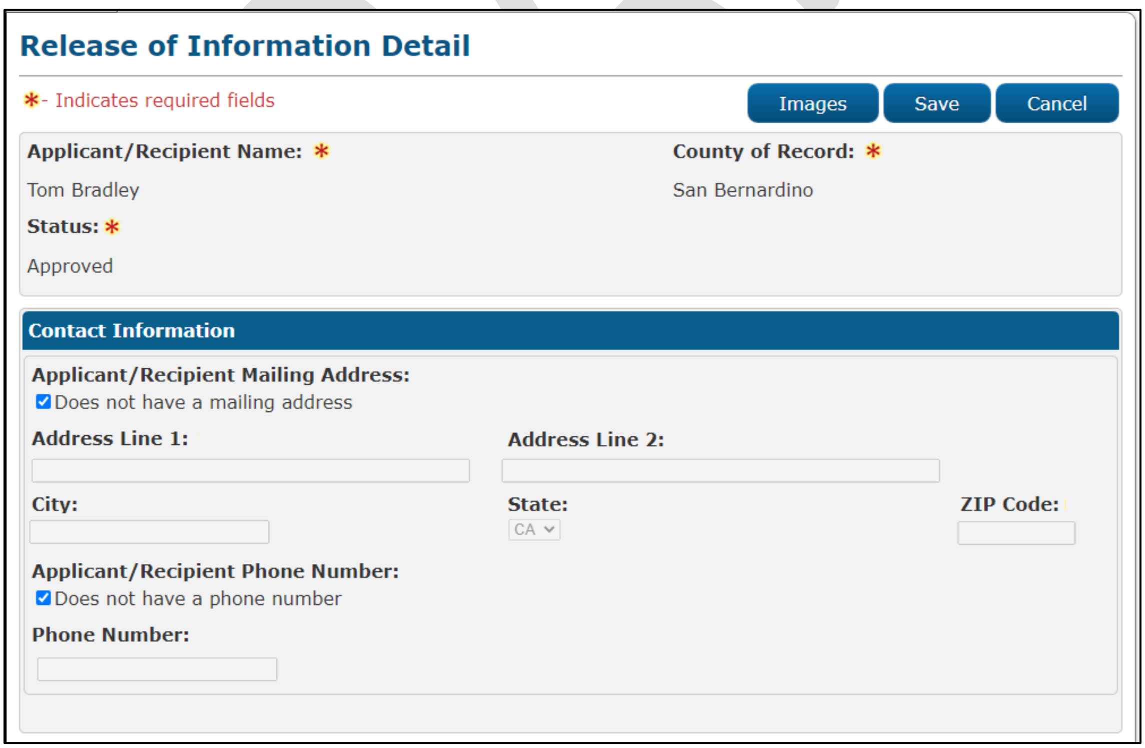


Figure 2.2.2-3 – Release of Information Detail Page – (Create Mode 1A)

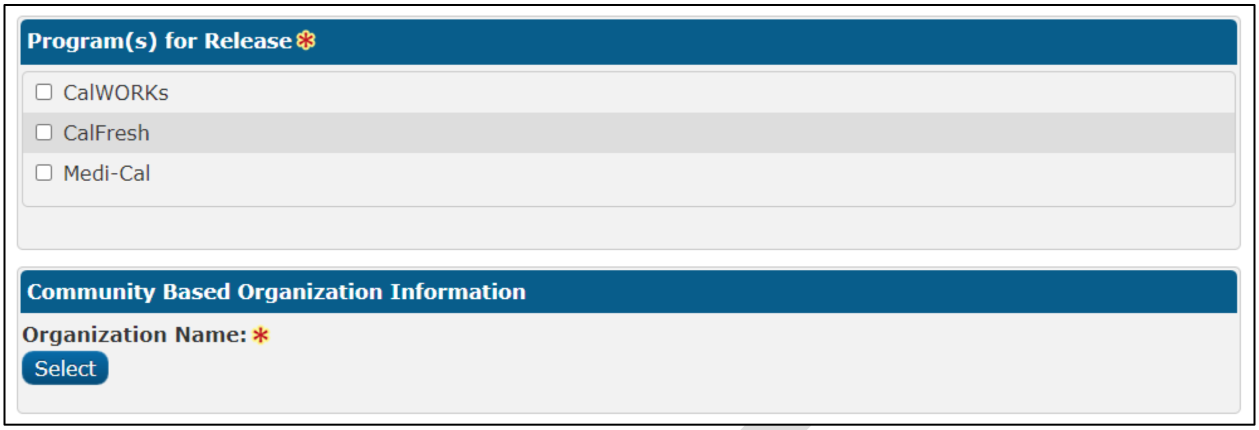


Figure 2.2.2-4 – Release of Information Detail Page – (Create Mode 2)

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

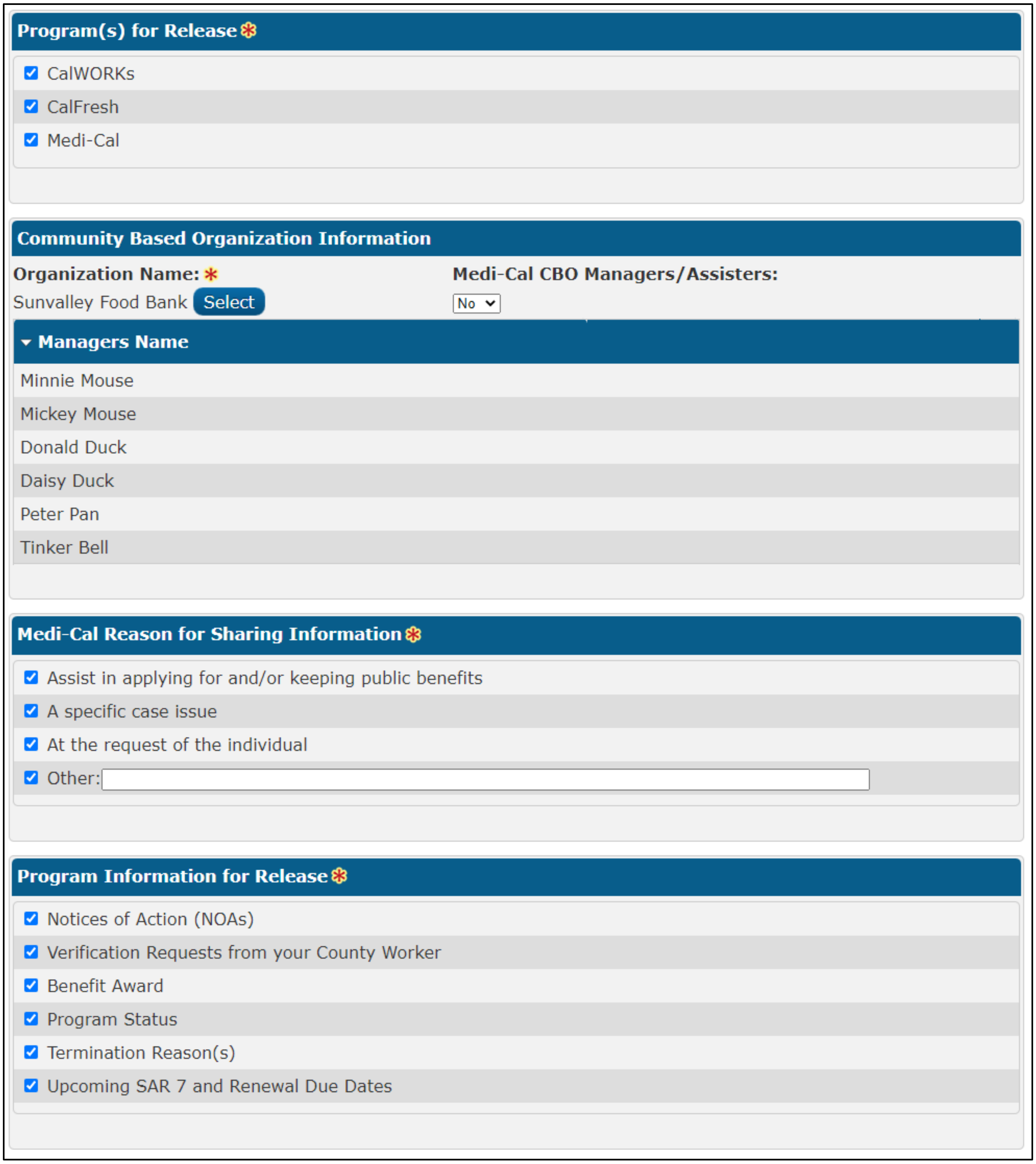


Figure 2.2.2-6 – Release of Information Detail Page – (Create Mode 2B)

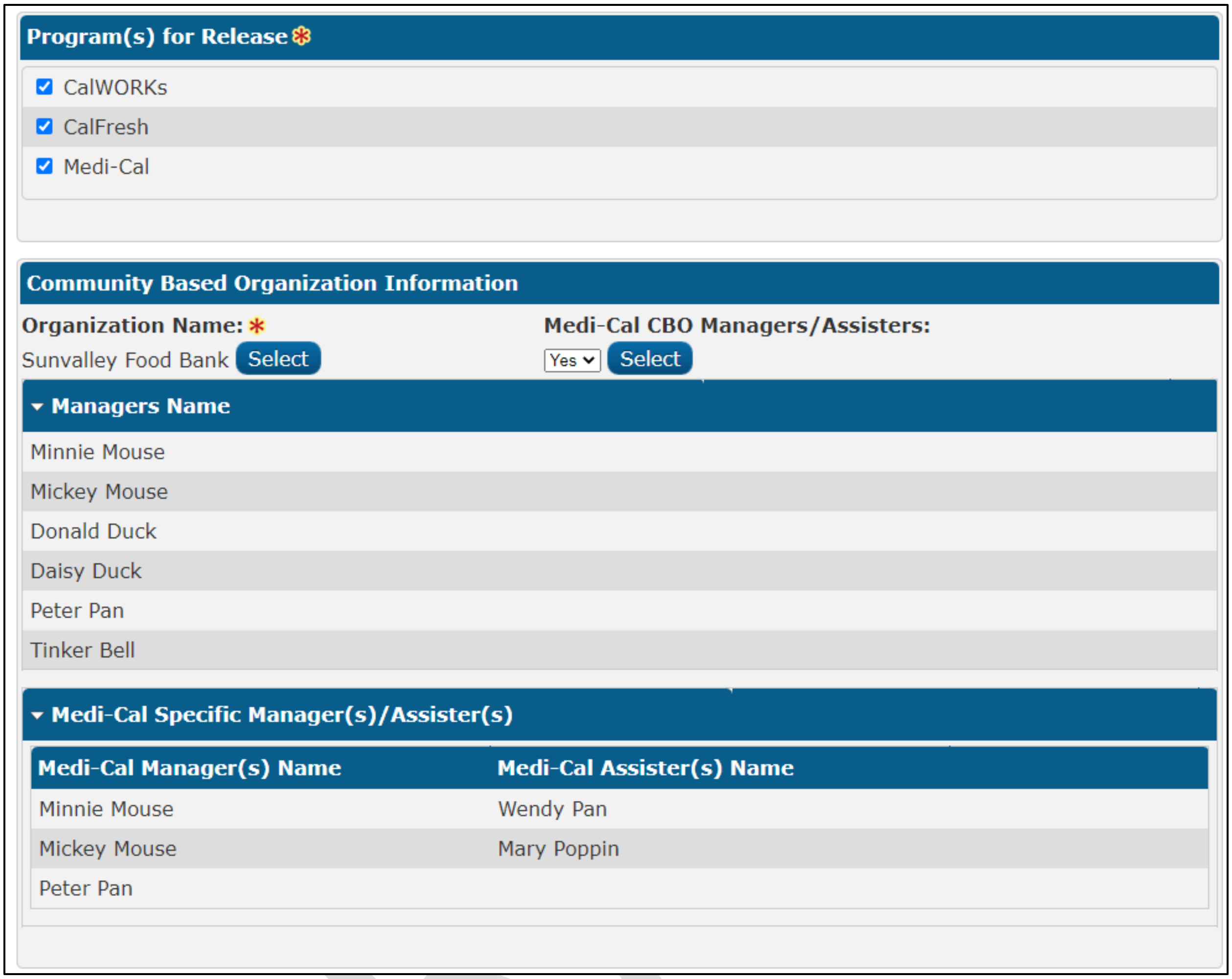


Figure 2.2.2-7 – Release of Information Detail Page – (Create Mode 2C)

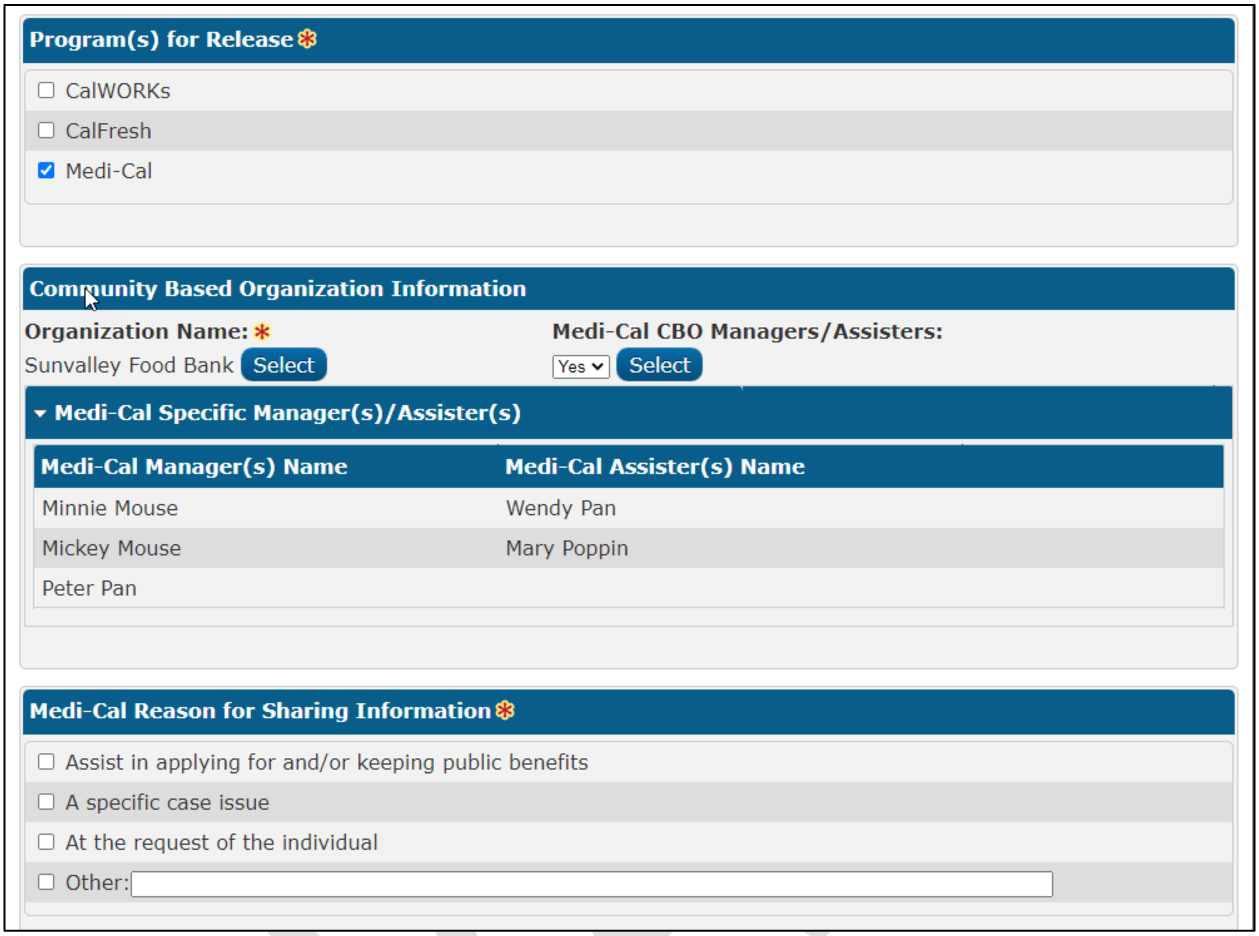


Figure 2.2.2-8 – Release of Information Detail Page – (Create Mode 2D)

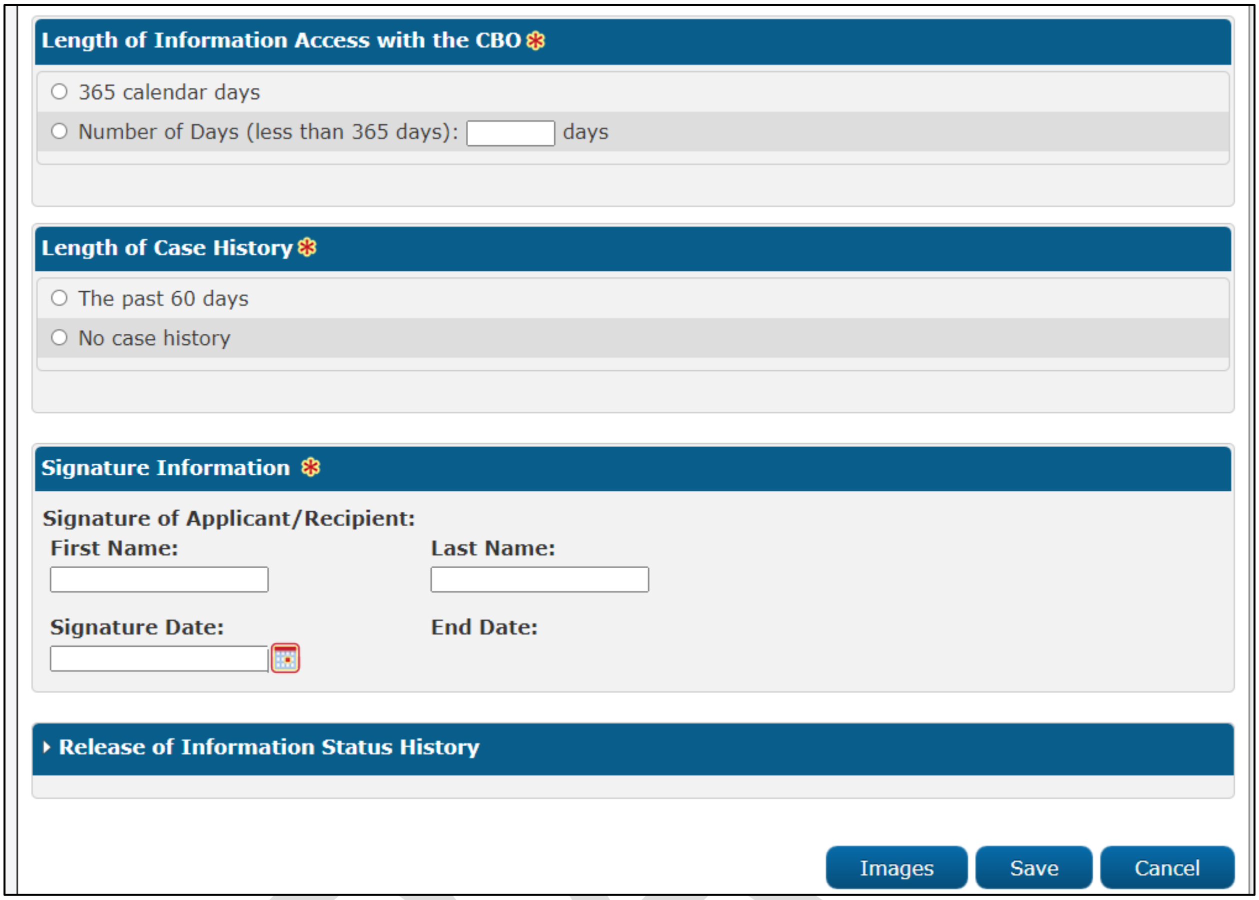


Figure 2.2.2-9 – Release of Information Detail Page – (Create Mode 3 CF program only)

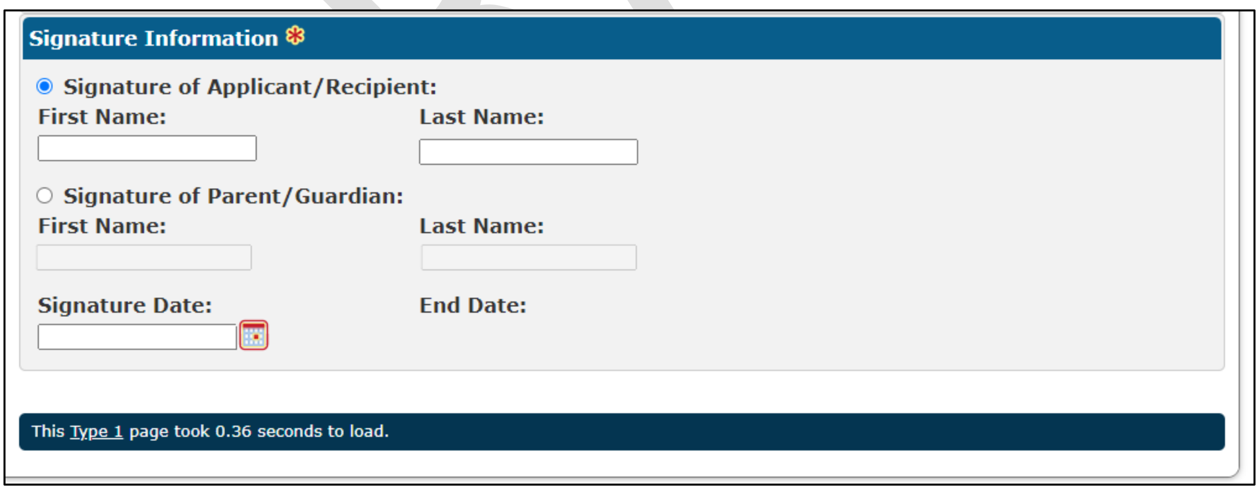


Figure 2.2.2-10 – Release of Information Detail Page – (Create Mode 4_Signature Block when CW/MC selected)

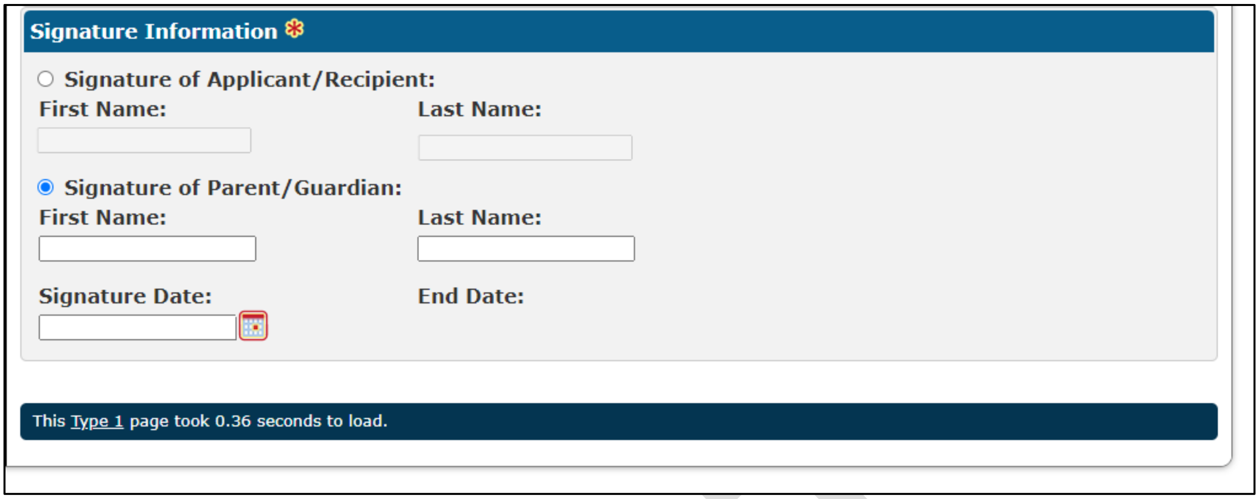


Figure 2.2.2-11 – Release of Information Detail Page – (Create Mode 4A_Signature Block when CW/MC selected)

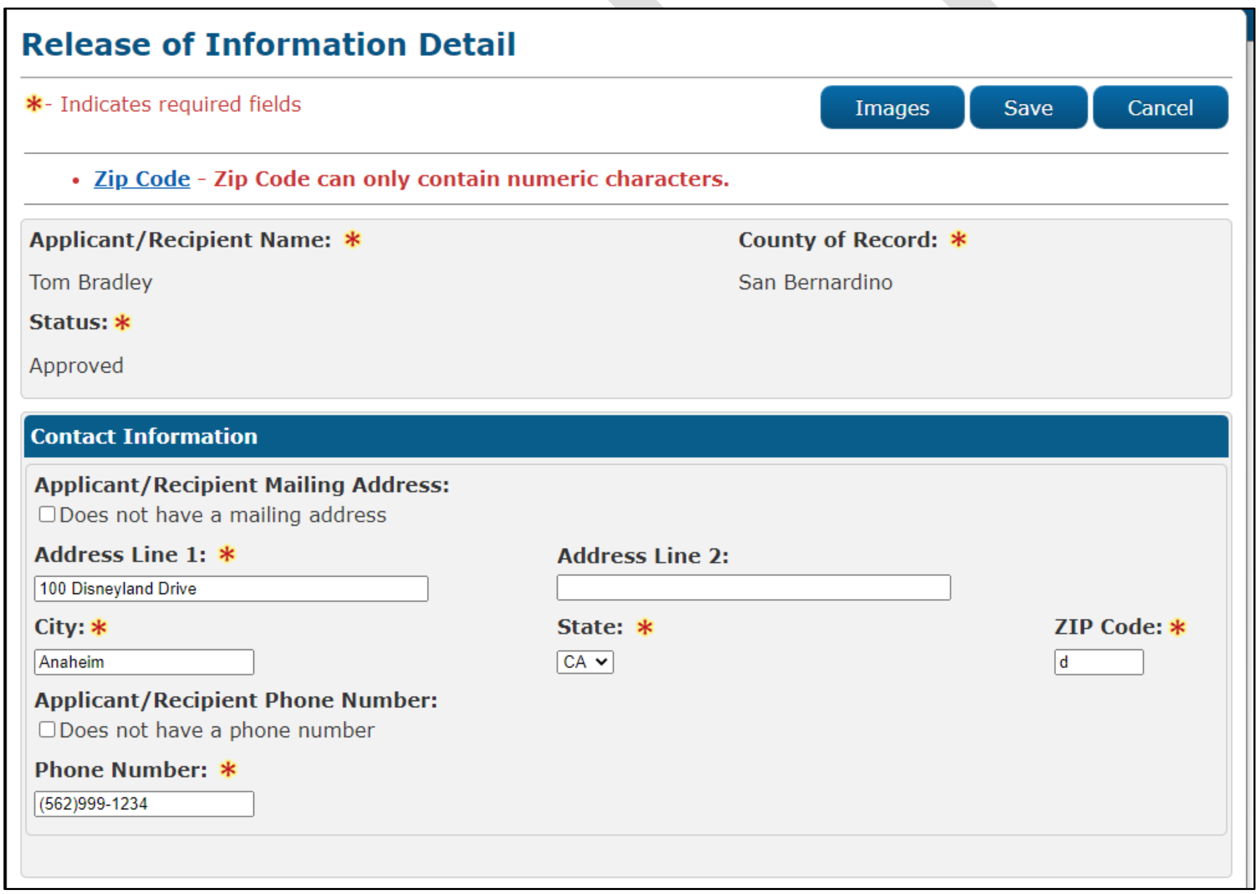


Figure 2.2.2-12 – Release of Information Detail Page – (Create Mode Validation1)

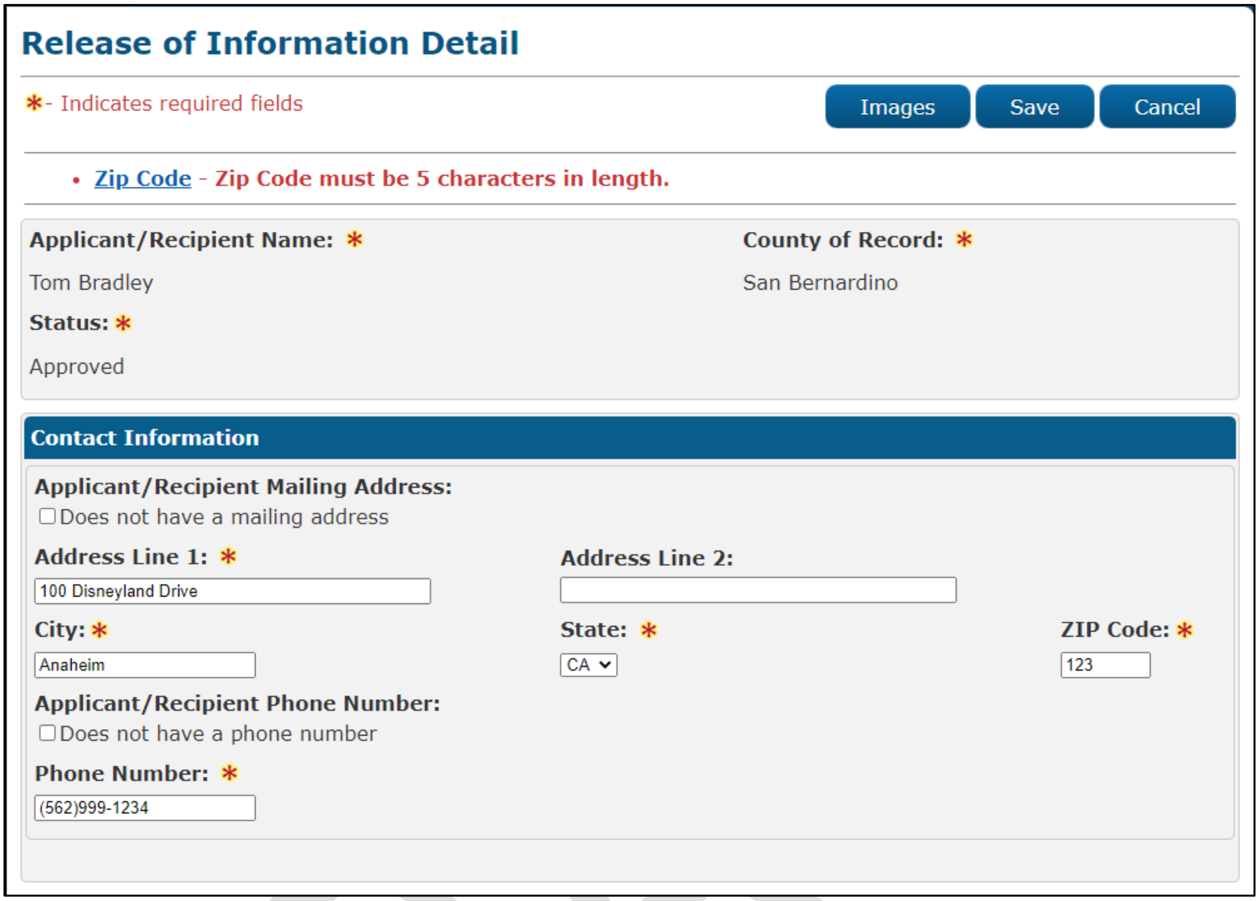


Figure 2.2.2-13 – Release of Information Detail Page – (Create Mode Validation2)

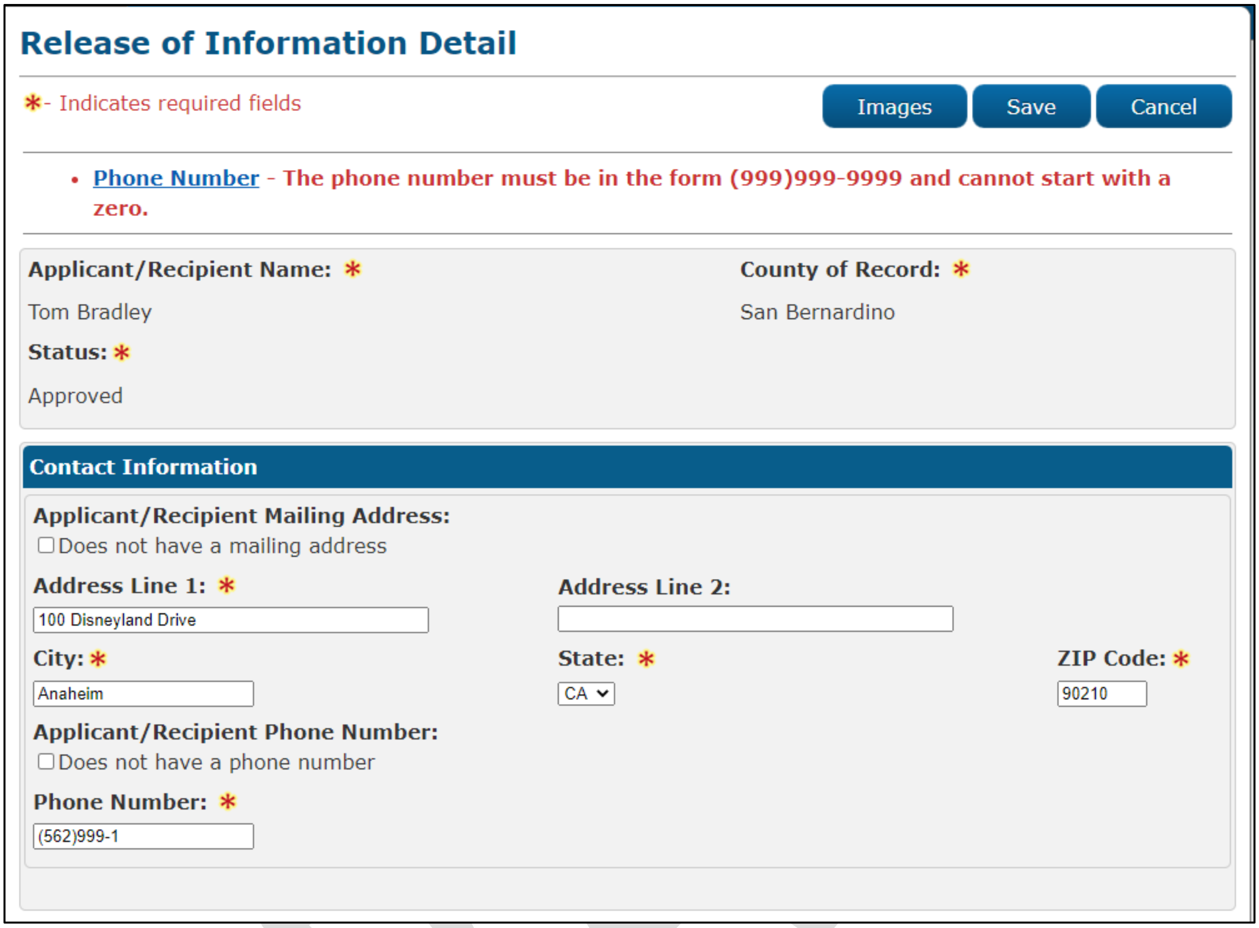


Figure 2.2.2-14 – Release of Information Detail Page – (Create Mode Validation3)

Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Other - This is a required field, please enter 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)111-5555

Program(s) for Release *

☑ CalWORKs

☑ CalFresh

☑ Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank Select

Medi-Cal CBO Managers/Assisters:

No Select

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

Medi-Cal Reason for Sharing Information *

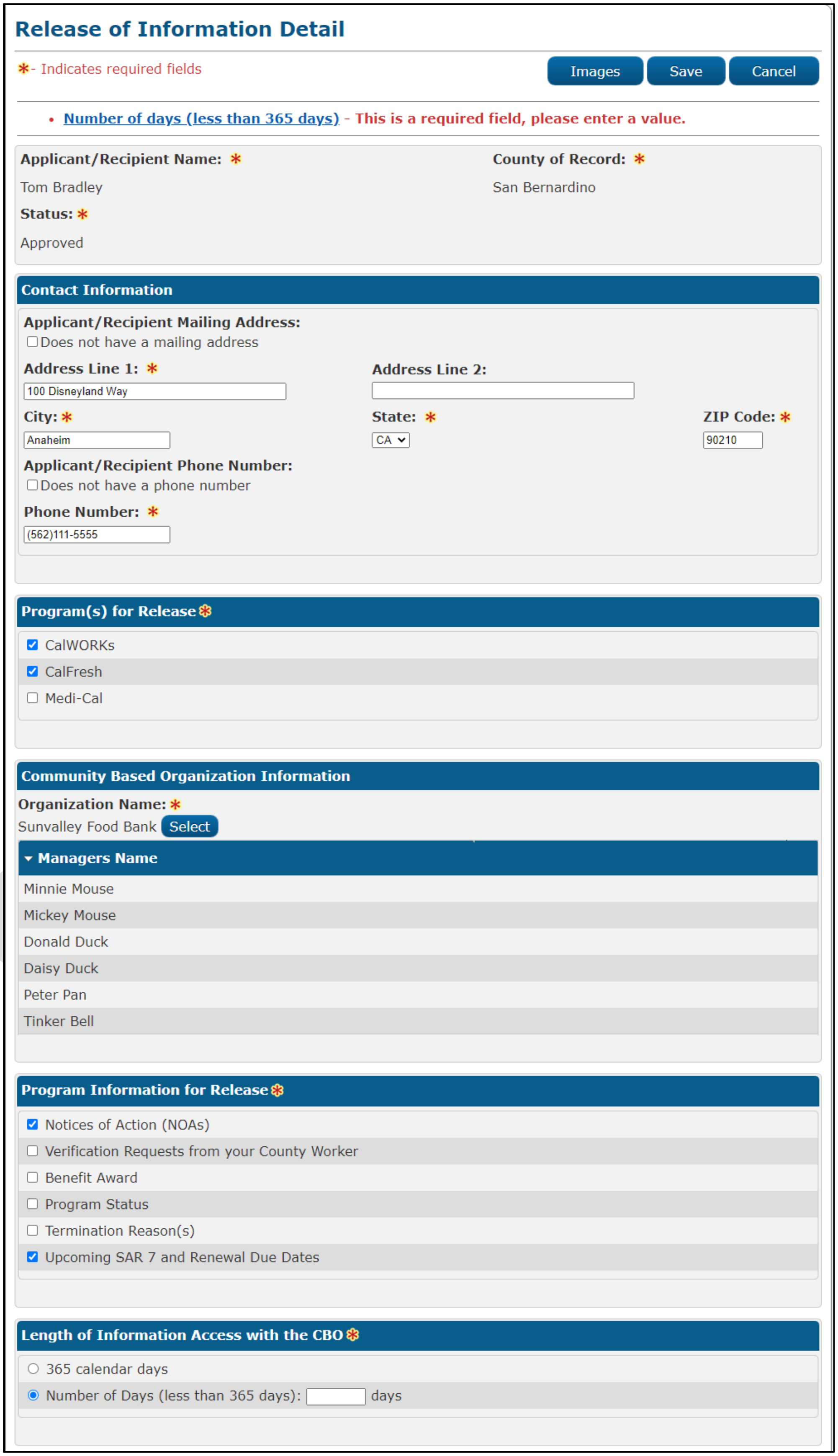
☐ Assist in applying for and/or keeping public benefits

☐ A specific case issue

☐ At the request of the individual

☑ Other:

Figure 2.2.2-15 – Release of Information Detail Page – (Create Mode Validation4)



Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Number of days (less than 365 days) - This is a required field, please enter 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)111-5555

Program(s) for Release *

☑ CalWORKs

☑ CalFresh

☐ Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank Select

Managers Name

Minnie Mouse

Mickey Mouse

Donald Duck

Daisy Duck

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)

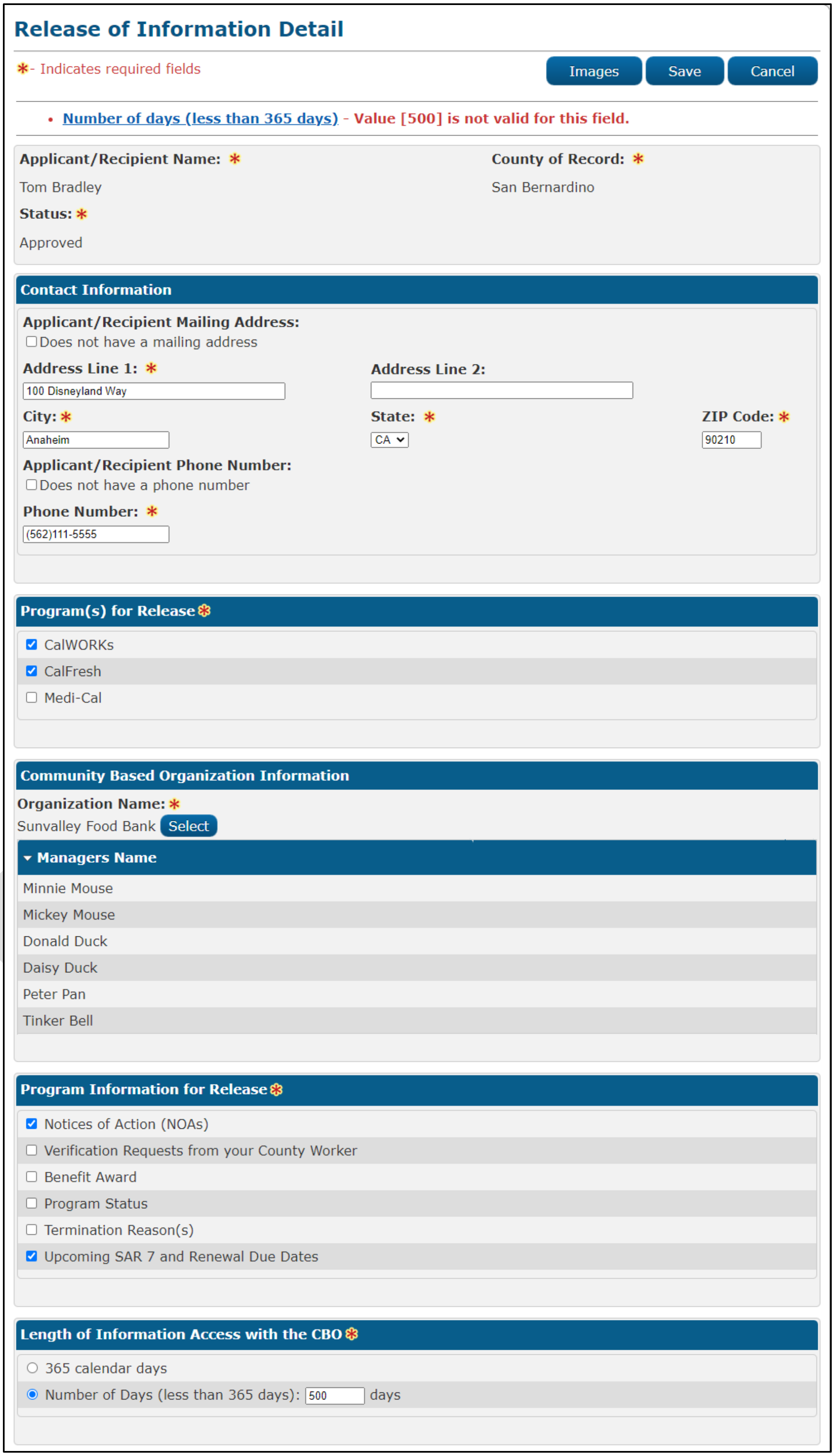
☑ Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO *

○ 365 calendar days

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

Figure 2.2.2-16 – 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
Minnie Mouse
Mickey Mouse
Donald Duck
Daisy Duck
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 2.2.2-17 – Release of Information Detail Page – (Create Mode Validation6)

Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Number of days (less than 365 days) - Value [ABC] 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
Minnie Mouse
Mickey Mouse
Donald Duck
Daisy Duck
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): ABC days

Figure 2.2.2-18 – 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 form 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)-999-8888

Program(s) for Release *

☐ CalWORKs

☑ CalFresh

☐ Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank Select

Managers Name
Minnie Mouse
Mickey Mouse
Donald Duck
Daisy Duck
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 2.2.2-19 – Release of Information Detail Page – (Create Mode Validation8)

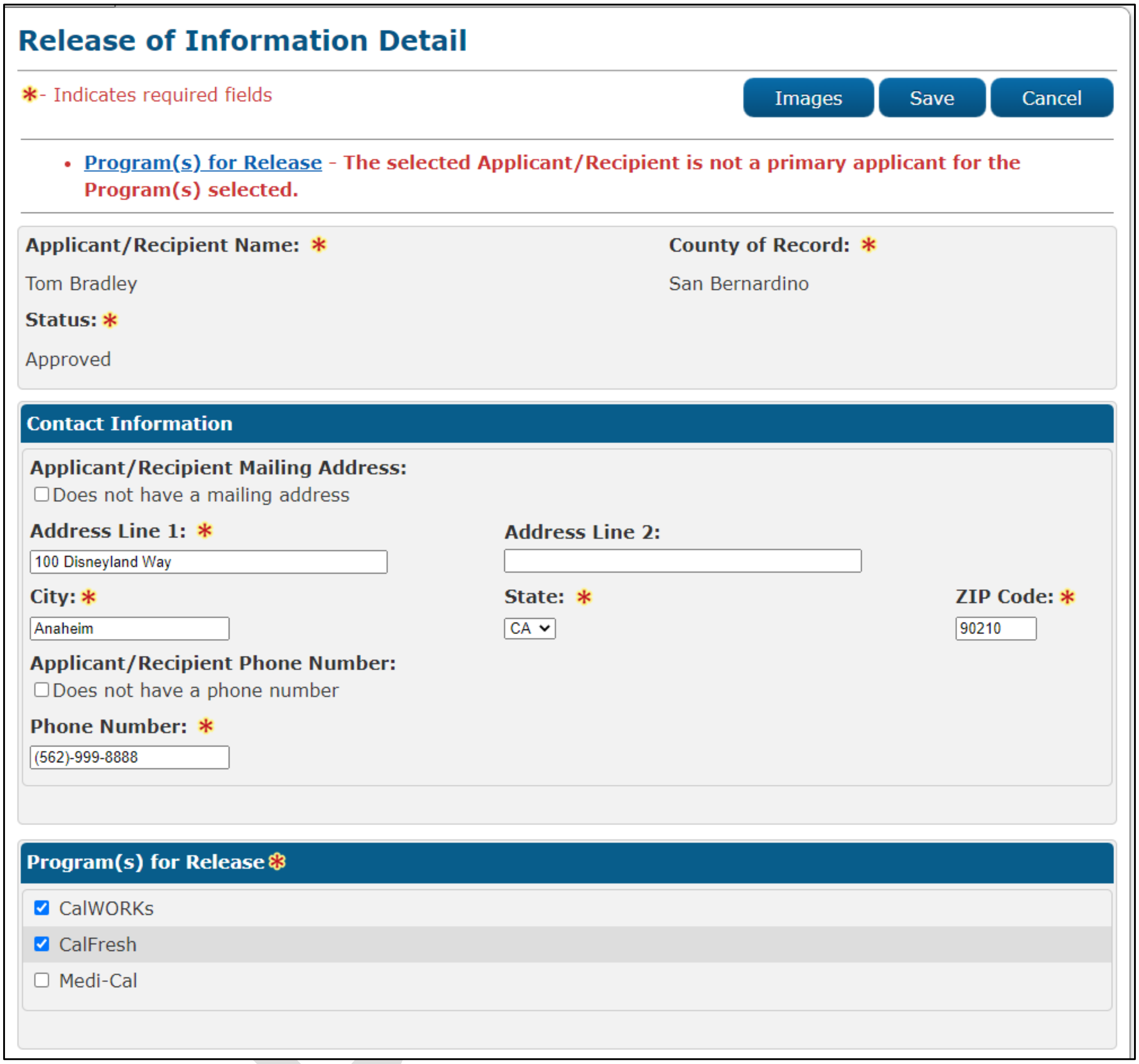


Figure 2.2.2-20 – Release of Information Detail Page – (Create Mode Validation9)

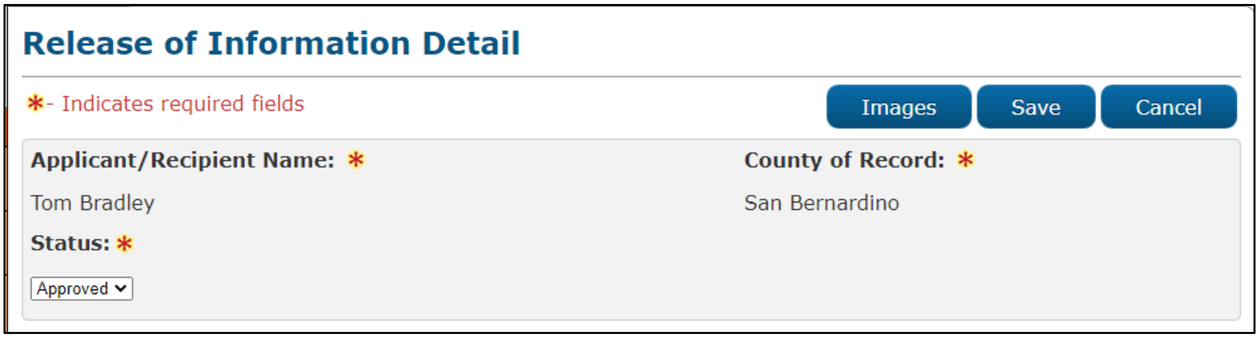


Figure 2.2.2-21 – Release of Information Detail Page – (Edit Mode Approved)

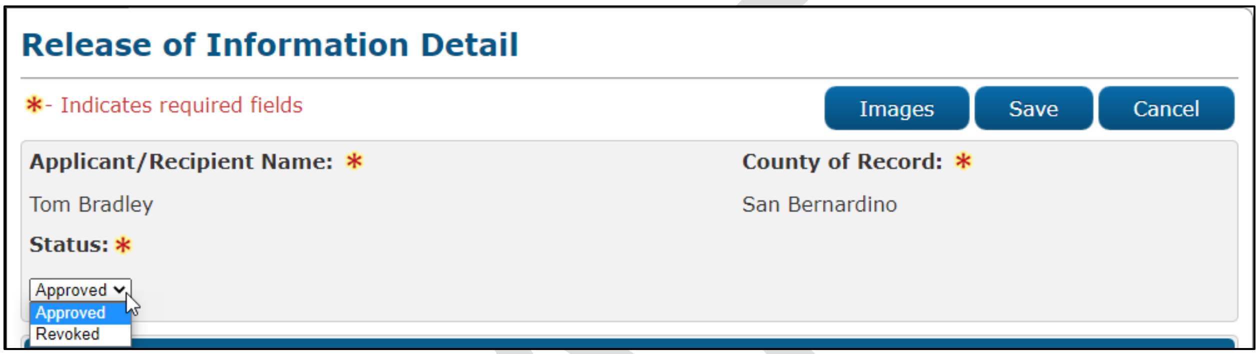


Figure 2.2.2-22 – Release of Information Detail Page – (Edit Mode Approved 1)

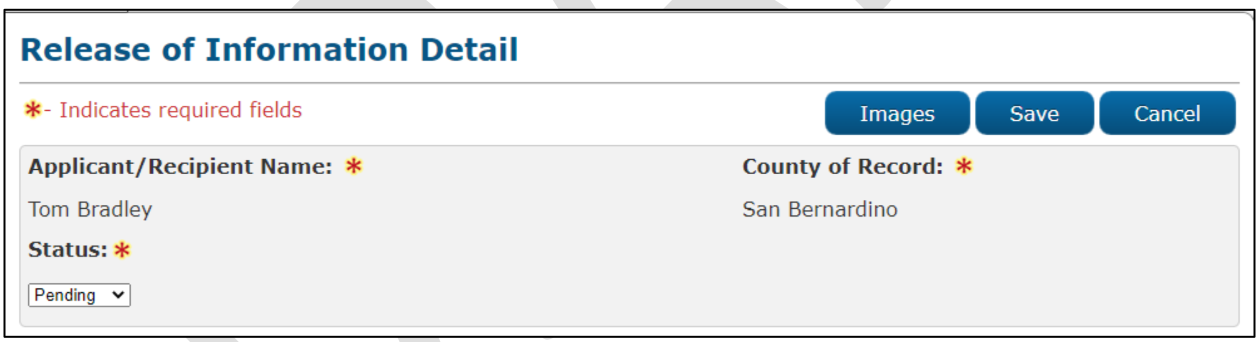


Figure 2.2.2-24 – Release of Information Detail Page – (Edit Mode Pending 1)

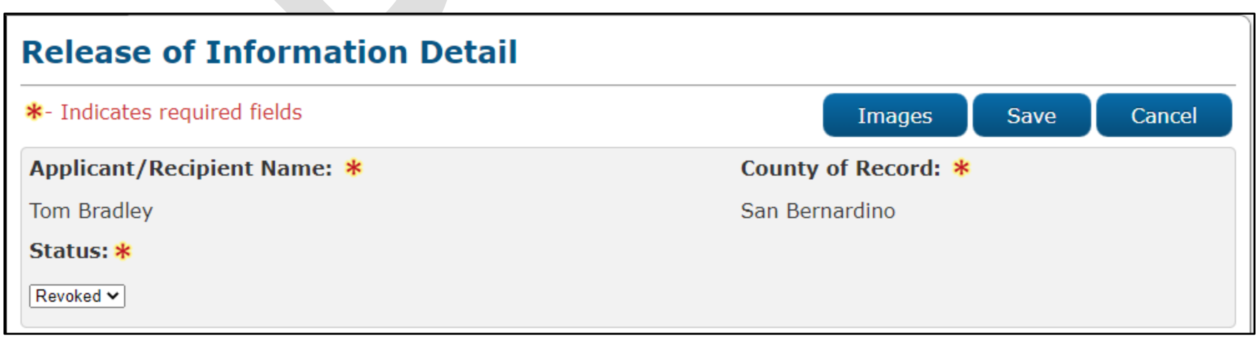


Figure 2.2.2-25 – Release of Information Detail Page – (Edit Mode Revoked)

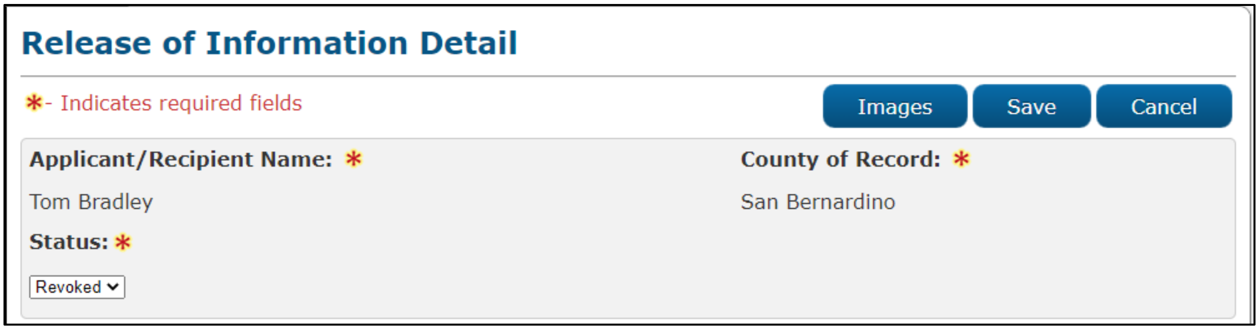


Figure 2.2.2-26 – Release of Information Detail Page – (Edit Mode Revoked 1)

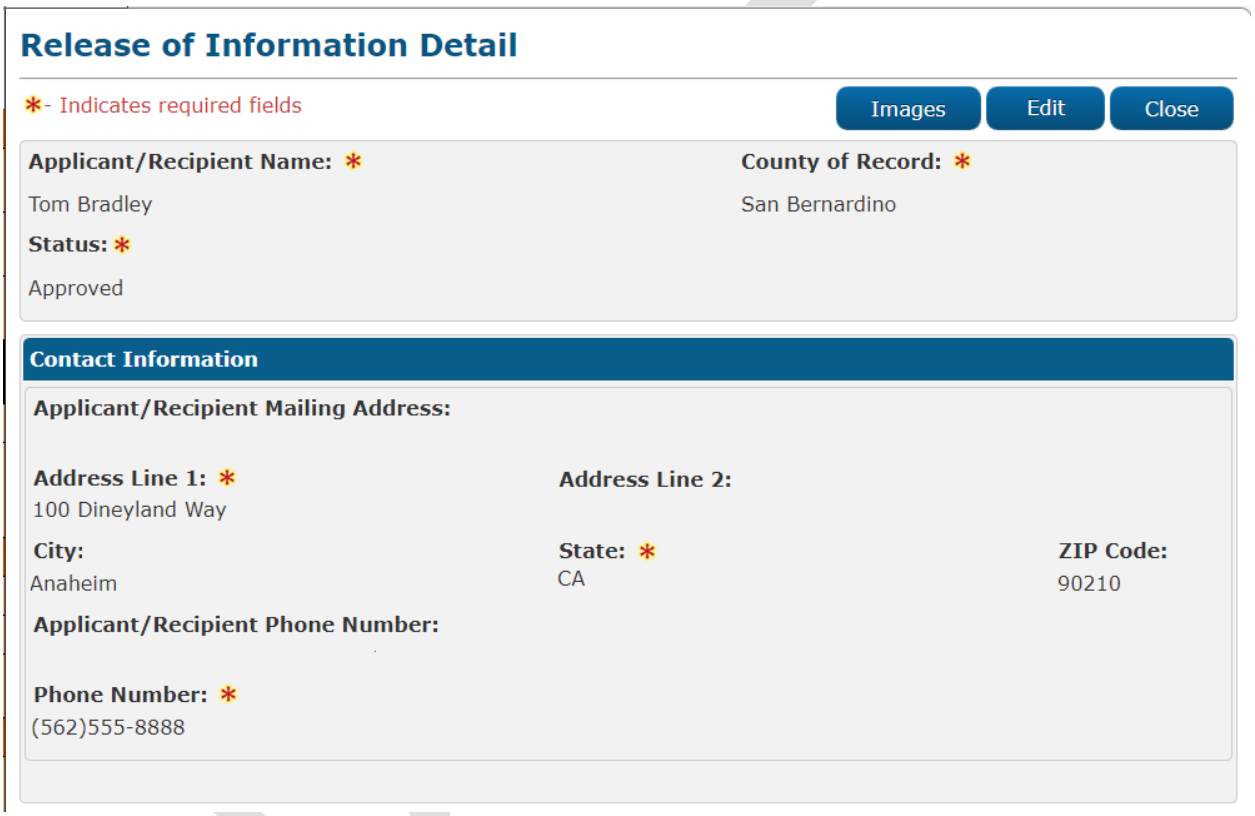
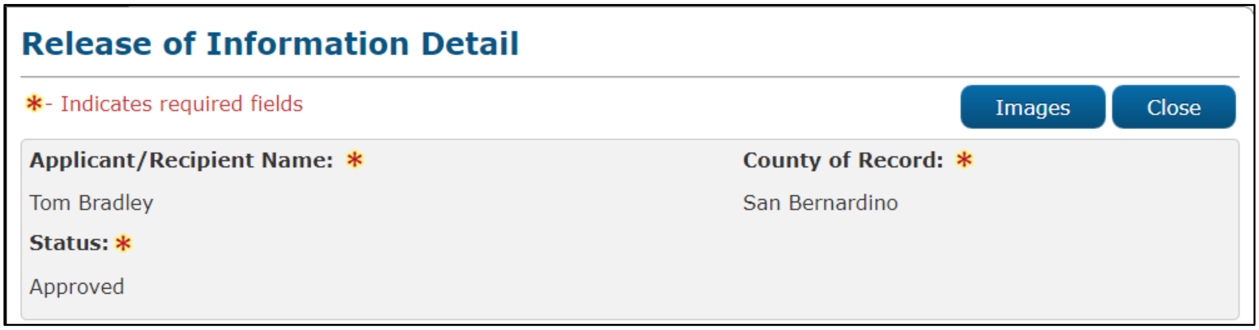


Figure 2.2.2-27 – Release of Information Detail Page – (View Mode)



Release of Information Detail

*- Indicates required fields

Images | Close

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Figure 2.2.2-28 – Release of Information Detail Page – (View Mode – With no ReleaseofInformationEdit Security Right)

Contact Information

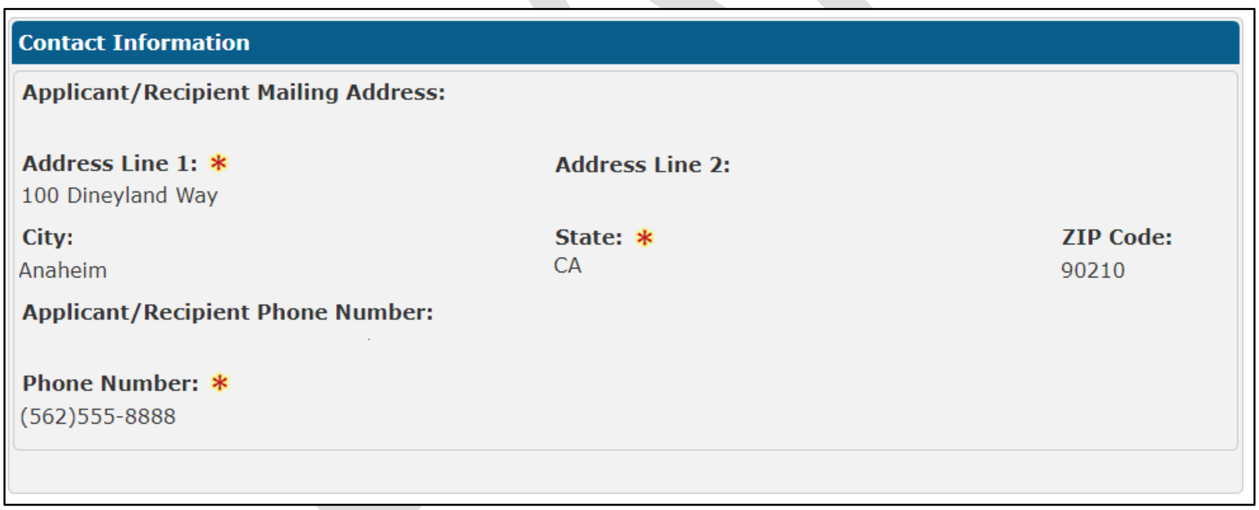
Applicant/Recipient Mailing Address:

✔ Does not have a mailing address

Applicant/Recipient Phone Number:

✔ Does not have a phone number

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



Contact Information

Applicant/Recipient Mailing Address:

Address Line 1: *

100 Dineyland Way

Address Line 2:

City:

Anaheim

State: *

CA

ZIP Code:

90210

Applicant/Recipient Phone Number:

Phone Number: *

(562)555-8888

Figure 2.2.2-30 – Release of Information Detail Page – (View/Edit Mode-Contact 1)

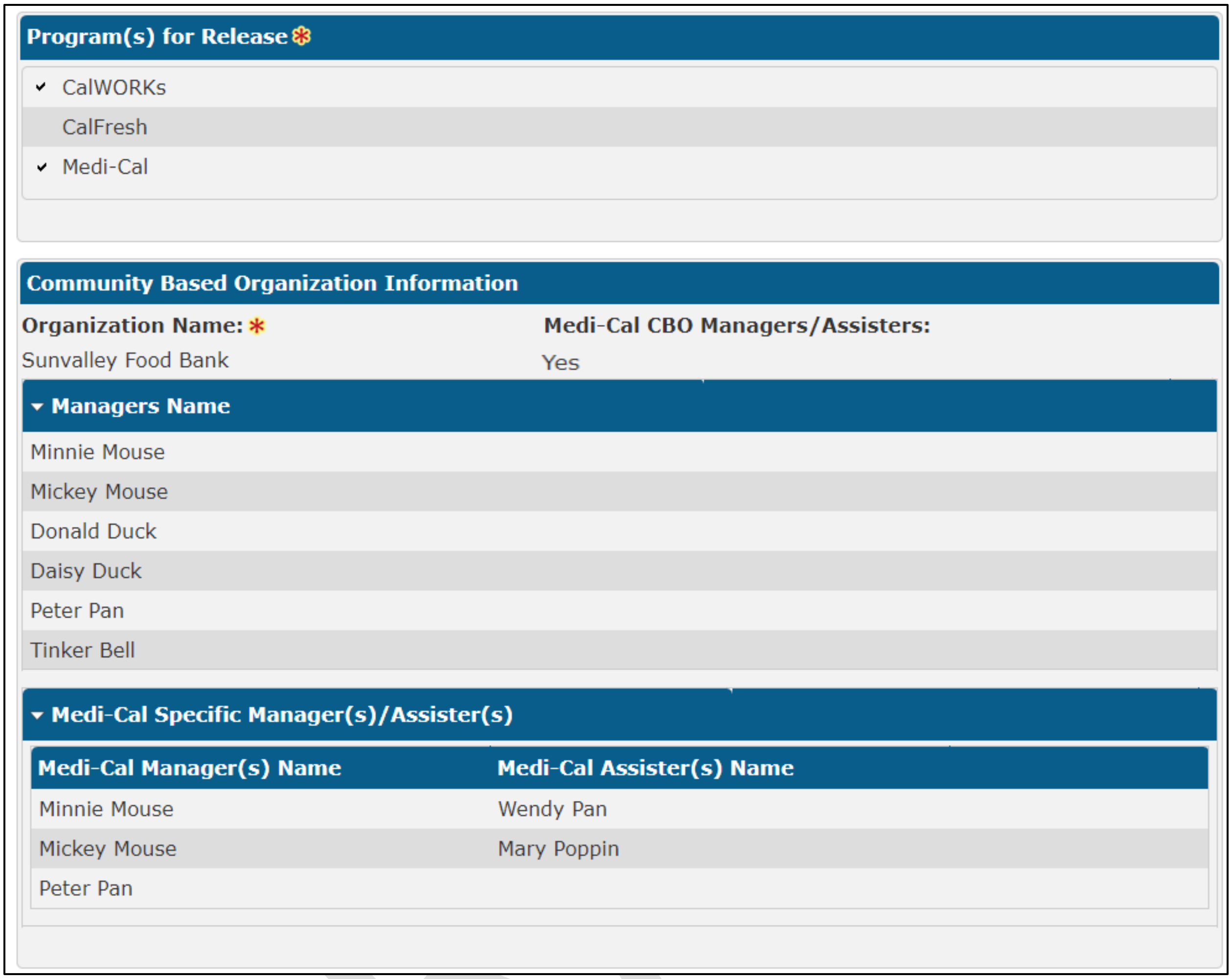
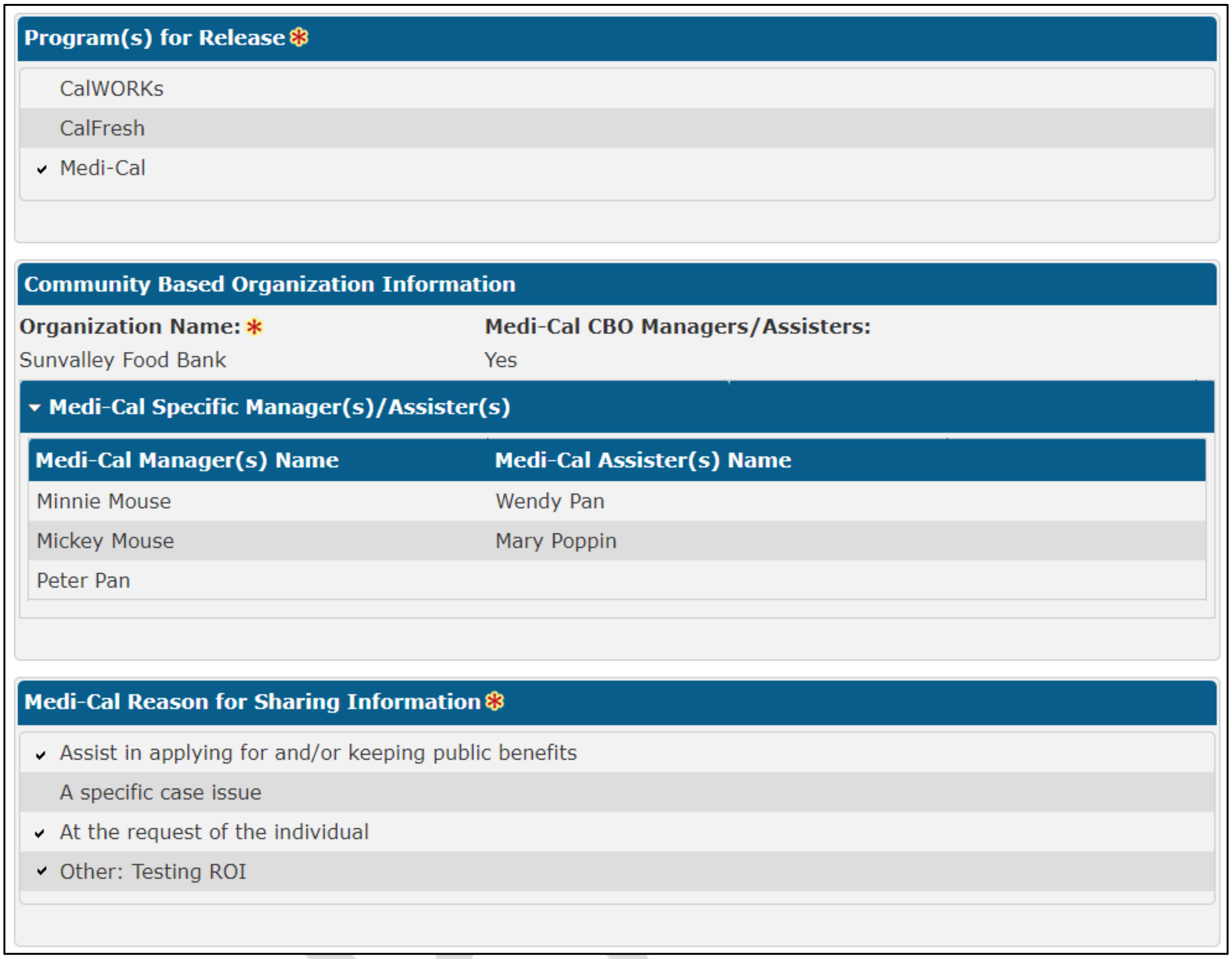


Figure 2.2.2-31 – Release of Information Detail Page – (View/Edit Mode)



Program(s) for Release

- CalWORKs
- CalFresh
- ✓ Medi-Cal

Community Based Organization Information

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

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

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

Medi-Cal Reason for Sharing Information

- ✓ Assist in applying for and/or keeping public benefits
- A specific case issue
- ✓ At the request of the individual
- ✓ Other: Testing ROI

Figure 2.2.2-32 – 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

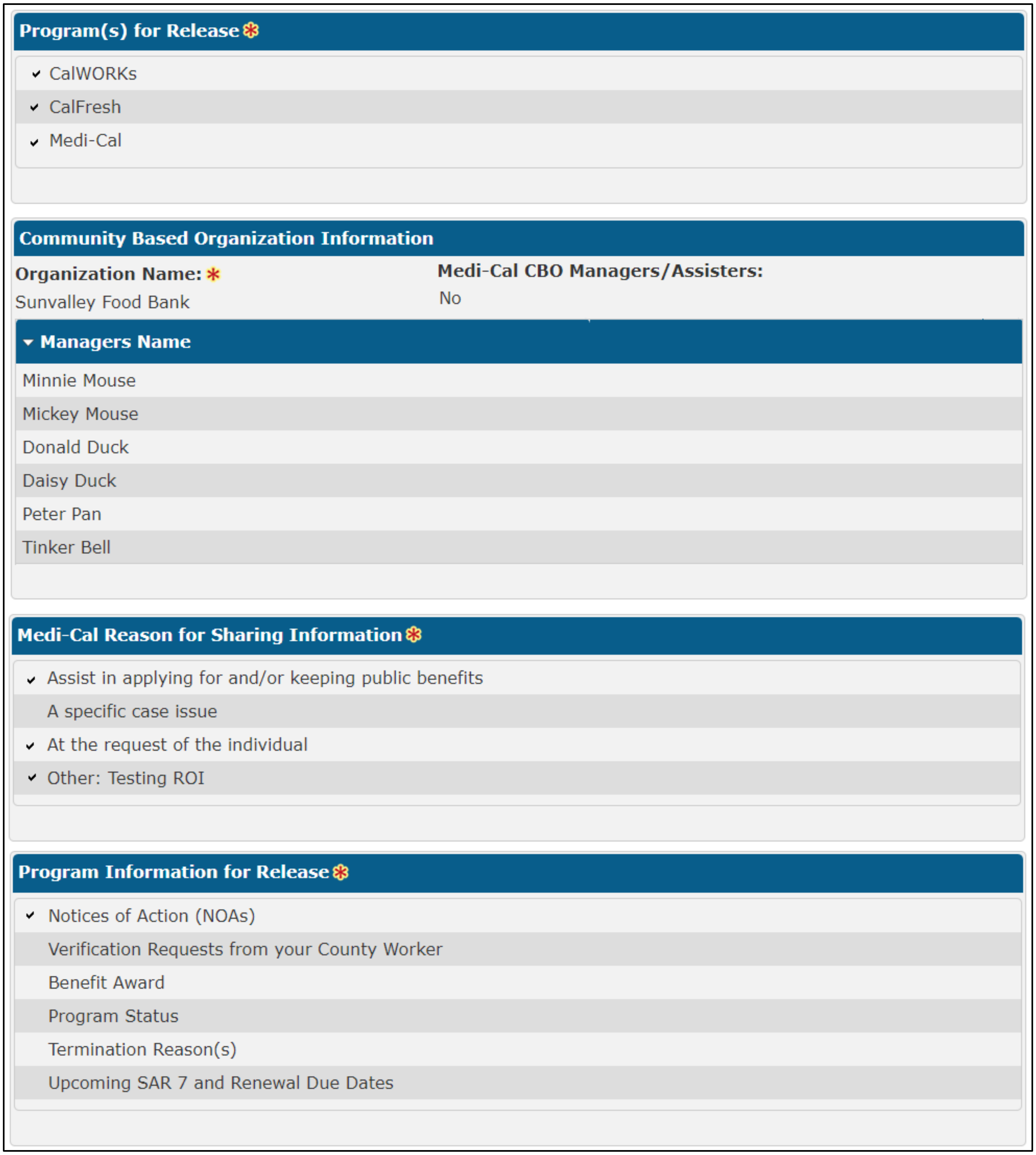
Managers Name

Minnie Mouse
Mickey Mouse
Donald Duck
Daisy Duck
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 2.2.2-33 – Release of Information Detail Page – (View/Edit Mode-2)



Program(s) for Release

- ✓ CalWORKs
- ✓ CalFresh
- ✓ Medi-Cal

Community Based Organization Information

Organization Name:
Sunvalley Food Bank

Medi-Cal CBO Managers/Assisters:
No

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

Medi-Cal Reason for Sharing Information

- ✓ Assist in applying for and/or keeping public benefits
- A specific case issue
- ✓ At the request of the individual
- ✓ Other: Testing ROI

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 2.2.2-34 – 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 2.2.2-35 – Release of Information Detail Page – (View/Edit Mode-4)

Signature Information

Signature of Applicant/Recipient:

First Name:	Last Name:
Tom	Bradley
Signature Date:	**End Date:**
01/31/2023	01/31/2024

Figure 2.2.2-36 – 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:	Last Name:
Tom	Bradley
Signature Date:	**End Date:**
01/31/2023	01/31/2024

Figure 2.2.2-37 – 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 2.2.2-38 – 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 2.2.2-39 – Release of Information Detail Page – (View/Edit Mode-Release of Information -2)

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 field (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 (this will be 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.
            3. In Edit mode, the Status field will be an editable drop-down field.
                a. When the page first open 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 2.6 of 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 '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 2.6 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 'Revoke'.
    1. Revoked

Note: Please reference Section 2.6 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.

Note: The Status will automatically be updated to Expired based on the End Date of the ROI record. Please refer to Section 2.12 since this status will be updated through a new batch job.

iii. County of Record
    1. This will be a required field and will not be editable. The page will automatically default to the county that the logged in user belongs to.

iv. Contact Information block
    1. The Contact Information block will have the following fields that are not editable when the page is in Edit mode.
        a. 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 Code field.

3. When the check box on this field is checked off, the system will not save any information that are entered on the Address Line 1, Address Line 2, City, State, and Zip Code
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 Edit and View mode if it's not selected.

ii. Address Line 1:

1. This will be a required text field and the maximum amount of characters is 50.
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 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.

iii. Address Line 2:

1. This will be a text field and the maximum amount 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 amount of characters is 50
    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 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.

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 Edit and View mode when the ‘Does not have a mailing address’ is checked off.

vi. Zip Code:
    1. This will be a text field and the maximum amount of characters is 5.
    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 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 can only contain numeric characters."
        i. Validation will be triggered when the user clicks Save and the value entered contains alpha characters are entered on the Zip Code field.
    b. 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 characters 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 check box on this field is checked off, the system will not save any information that's entered on the Phone Number field.
        4. The check box will not be checked off when in Create mode when the page initially load.

            5. This field will not display in Edit and 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 character 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 Edit and 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 form (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 and will not be editable when in Edit mode. 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.

vi. Community Based Organization Information block
1. This block will not be editable when the page is in Edit mode.
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 call the CBO-Organization API (reference Section 2.8 for details on how this API will work) and 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 make another call the CBO Organization API and 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.
            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" will call the CBO-Organization API (reference

Section 2.8 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 Managers/Assisters are selected the user will be directed back to the Release of Information 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 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)
    2. This sub block will not be expanded when the page is in Edit or View mode.
    3. 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 only program selected is Medi-Cal.

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).

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).

2. This sub block will not be expanded when the page is in Edit or View mode.
3. 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”.

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 for Sharing Information block
    1. This will be a required block and will not be editable when in Edit mode. Users will be able to select multiple options but will be required to select at least one of the available options.
    2. When in Edit or 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 amount of characters of 1000.
                2. Once the maximum amount of characters is reached, no further characters can be entered.
            ii. Create a new validation "Other – This is a required field, please enter a value."
                1. 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.

viii. Program Information for Release block
    1. This will be a required block and will not be editable when in Edit mode. Users will be able to select multiple options but will be required to select at least one of the available options.
    2. When in Edit or 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

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 not be an editable field when in Edit mode.
3. When in Edit and 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. 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 amount of characters allowed is 3.
            2. Once the maximum amount of characters is reached, no further characters can be entered.
    c. Create 2 validations
        i. “Number of days (less than 365 days) - This is a required field, please enter a value.”
            1. Validation will be triggered when the users click Save and the Number of days (less than 365 days) option is selected from the Length of Information Access with the CBO block is selected 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.

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 not be an editable field when in Edit mode.
    3. When in Edit and 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

xi. Signature Information block
    1. All fields on this block will be required and will not be editable in Edit mode.
    2. Display the following fields:
        a. Signature of Applicant/Recipient:
            i. This field will have a radio button and will be selected when CalWORKs and/or Medi-Cal is selected on the Program(s) for Release block.
                1. When the page initially loads in Create mode or when the only program selected in CalFresh, the radio button will not display.
                2. In Edit mode and View mode, this field will not display if it's not selected (this is only possible when CW and/or MC is selected).
        b. First Name
            i. This field will be located below the "Signature of Applicant/Recipient: field.
            ii. This will be a text field and will have a maximum character limit of 30.
            iii. Once the maximum amount of characters is reached, no further characters can be entered.

iv. This field will be greyed out when the Signature of Parent/Guardian is selected (this is only possible when CalWORKs and/or Medi-Cal is selected).
    1. Any information entered on this field will not be saved.

Note: This is where users will need to enter the First Name of the Applicant/Recipient.

c. Last Name
    i. This field will be located below the “Signature of Applicant/Recipient: field.
    ii. This will be a text field and will have a maximum character limit of 30.
    iii. Once the maximum amount of characters is reached, no further characters can be entered.
    iv. This field will be greyed out when the Signature of Parent/Guardian is selected (this is only possible when CalWORKs and/or Medi-Cal is selected).
        1. Any information entered on this field will not be saved.

    Note: This is where users will need to enter the Last Name of the Applicant/Recipient.
d. Signature of Parent/Guardian:
    i. This field will 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 load in Create mode or when the only program selected in CalFresh, this field
        2. In Edit mode and View mode, this field will not display if it’s not selected.
e. First Name
    i. This field will be located below the “Signature of Parent/Guardian:” field.

ii. This will be a text field and will have a maximum character limit of 30.
iii. Once the maximum amount of characters is reached, no further characters can be entered.
iv. This field will be greyed out when the Signature of Applicant/Recipient is selected (this is only possible when CalWORKs and/or Medi-Cal is selected).
    1. Any information entered on this field will not be saved.

Note: This is where users will need to enter the First Name of the Parent/Guardian.

f. Last Name
   i. This field will be located below the "Signature of Parent/Guardian:" field.
   ii. This will be a text field and will have a maximum character limit of 30.
   iii. Once the maximum amount of characters is reached, no further characters can be entered.
   iv. This field will be greyed out when the Signature of Applicant/Recipient is selected (this is only possible when CalWORKs and/or Medi-Cal is selected).
       1. Any information entered on this field will not be saved.

   Note: This is where users will need to enter the Last Name of the Parent/Guardian.

g. Signature Date:
   i. The user can enter their desired date or click on the calendar icon to select the date.
   ii. Signature Date will need to be in the format of MM/DD/YYYY (Example: 12/25/2022).
   iii. Create a new validation "Signature Date – Must be a valid calendar date and be in the form MM/DD/YYYY."

1. Validation will be trigger when the user clicks Save, and the date enter on the Signature Date field is not a valid calendar date or not in the correct format.

h. End Date:
    i. This field will be blank when the page is in Create mode.
    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.
    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 status 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. Update 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 a validation message "Program(s) for Release – The selected Applicant/Recipient is not a primary applicant for the Program(s) selected."
1. Validation message will be triggered when the user clicks Save, and the selected person is not a primary applicant for the Program(s) selected.

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 assign 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

Add the following security rights to the Release of Information Search page:

Security Right	Right Description	Right to Group Mapping
ReleaseofInformationView	This right will allow the users to view the Release of Information Search and Release of Information Detail pages.	Release of Information View
ReleaseofInformationEdit ReleaseofInformationView	The right allows the users to view & edit the Release of Information Search and Release of Information Detail pages.	Release of Information Edit

Add the following security groups to the Release of Information List page:

Security Group	Group Description	Group to Role Mapping
Release of Information View	This group will allow the users to view the Release of Information Search and 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

Security Group	Group Description	Group to Role Mapping
Release of Information Edit	The group allows the users to view & edit the Release of Information Search and Release of Information Detail page.	Eligibility Staff, Eligibility Supervisor

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 and add an approved organization for the CBO ROI.

2.4.2 Select Community Based Organization – Mockup

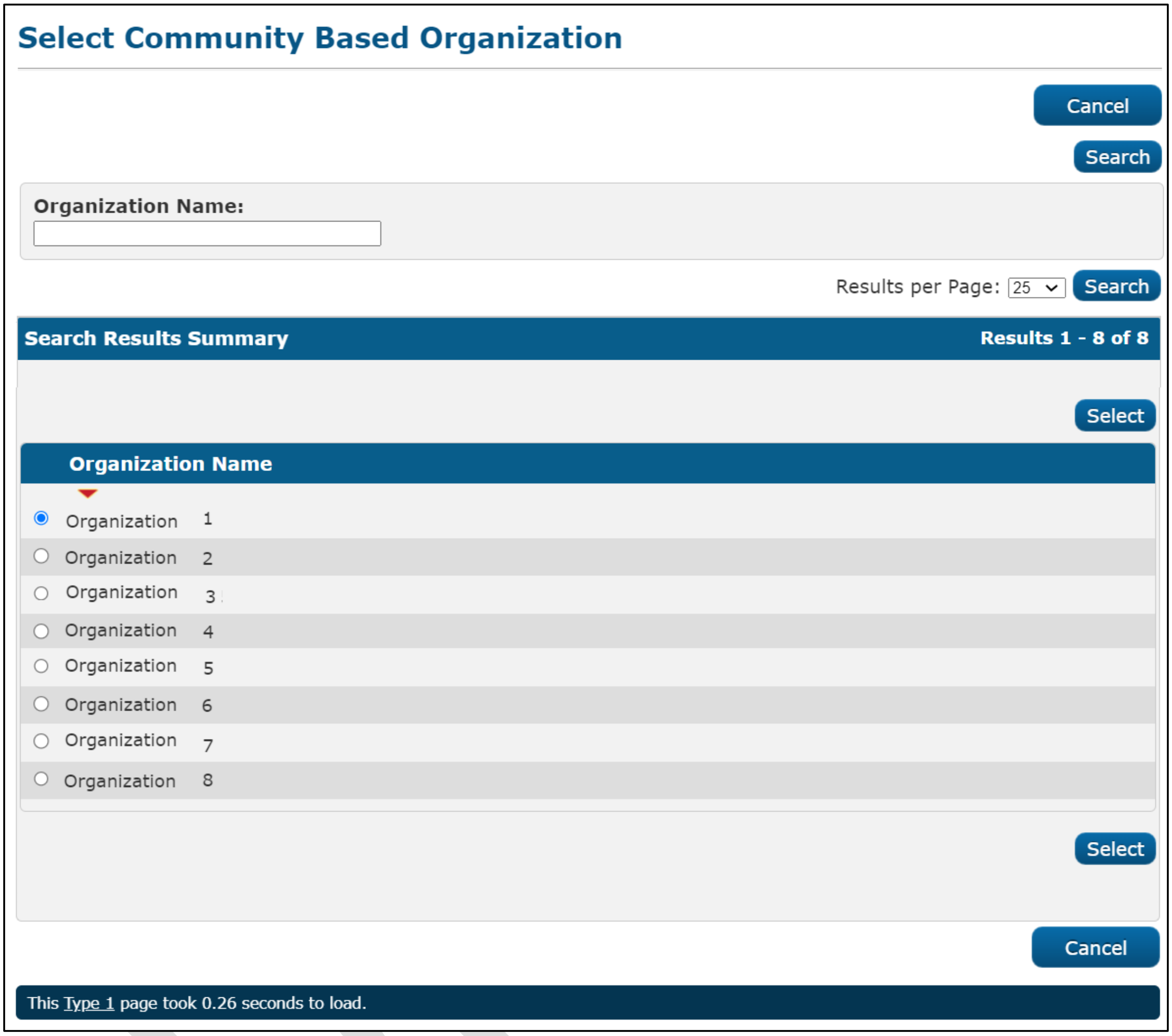


Figure 2.3.2-1 – Select Community Based Organization Page

2.4.3 Description of Changes

1. Add 'Select Community Based Organization page in the Global Navigation – Case Info and the Local Navigation – e-Tools.
    a. This page will be accessible upon clicking on 'Search' button in the 'Community Based Organization Information' section of the 'Release of Information Detail' page.
    b. Once the page loads, it will display the entire list of the CBOs on the page. If user enters the search criteria, the list of the CBOs will be updated according to the search criteria entered.
        i. Upon selecting the organization and clicking on Select button, user will be navigated back to the Release of Information Detail page. User will be able to view the

selected organization and its associated managers in the Release of Information Detail page

Note: User will be navigated to the 'Select CBO Managers & Assisters for Medi-Cal' page ONLY, if the Medi-Cal program is selected in the 'Release of Information Detail' page. User will have an option to select manager(s) and/or assister(s) in this page.

ii. If there are more than 25 records on the page, pagination will occur.

2.4.4 Page Location

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

2.4.5 Security Updates

1. Select Community Based Organization page will follow the same security rights as the Release of Information Search page.

2.4.6 Page Mapping

1. Add page mapping for the Select Community Based Organization page.

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 the manager(s) and/or assisters(s) for the ROI when the Medi-Cal program is selected. This page will be accessible upon selecting an organization from the Select Community Based Organization page. This page will display the name of the organization selected in the 'Organization Name' field, along with a list of managers and assisters associated to that organization. User will be able to select desired manager(s) and /or assister(s) per the customer's instruction. Upon clicking on Select button, user will be navigated back to the Release of Information Detail page.

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

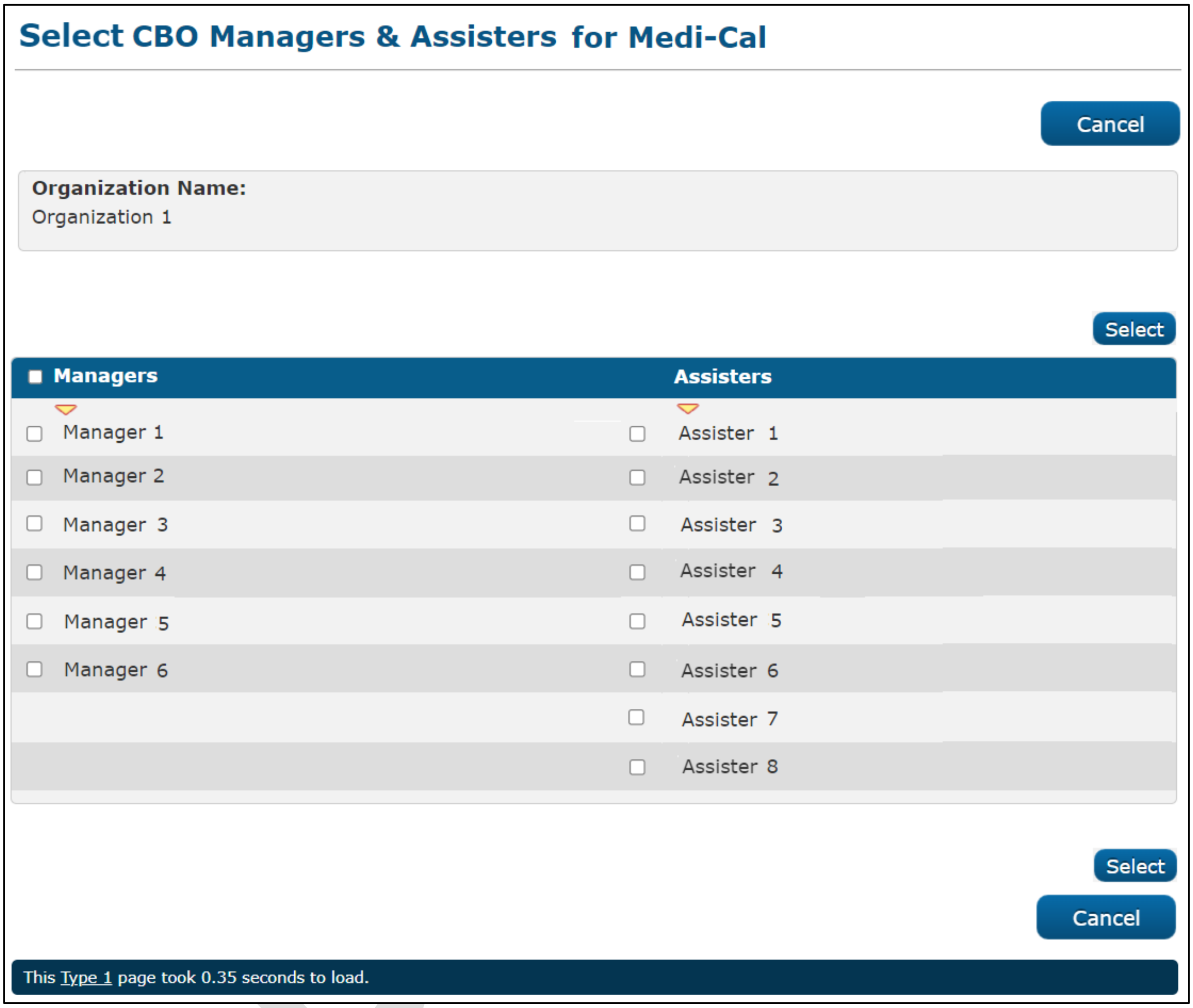


Figure 2.4.2-1 – Select CBO Managers and Assisters for Medi-Cal

2.5.3 Description of Changes

1. Add 'Select CBO Managers & Assisters for Medi-Cal' page in the Global Navigation - Case Info and the Local Navigation - e-Tools.
    a. This page will be accessible upon selecting an organization and clicking on Select button in the 'Select Community Based Organization' page, only if the Medi-Cal program is selected in the Release of Information Detail page.

Note: If user selects CalFresh and/or CalWORKs in the Release of Information Detail page, user will not be navigated to this page.

i. If CalFresh and/or CalWORKs programs are selected, user will directly be navigated to the Release of Information Detail page from the Select Community Based Organization page, and all the managers will be displayed in the program block.

ii. If there are more than 25 records on the page, pagination will occur.

2.5.4 Page Location

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

2.5.5 Security Updates

1. Select CBO Managers & Assisters for Medi-Cal page will follow the same security rights as the Release of Information Search page.

2.5.6 Page Mapping

1. Add page mapping for the Select CBO Managers & Assisters for Medic-Cal page.

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.

2.6.2 Case Summary – Self-Service Portal Mockup

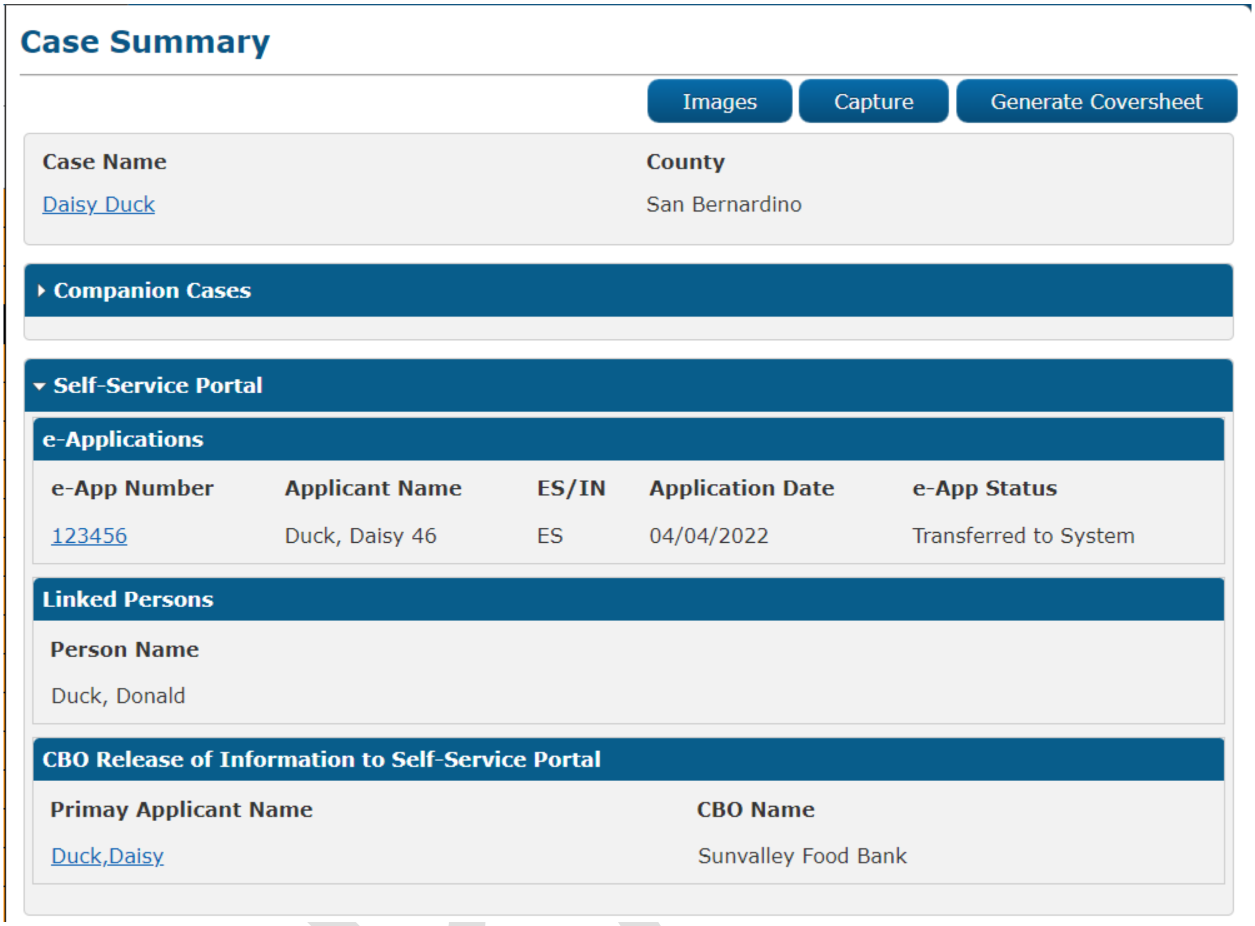


Figure 2.5.2-1 – Case Summary Page – Self-Service Portal Section – 1

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 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. 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 and 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 and 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 Security right.
         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 name of the organization that's selected on the Release of Information Detail page.
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 a 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
Applicant/Recipient Phone Number	The phone number of the ROI applicant listed on the CBO ROI form

Release of Information Attributes	
Attribute	**Description**
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 • CalWORKs • Medi-Cal
CBO Individual(s) *(If Medi-Cal program is selected)*	The name(s) of the CBO individual(s) (Managers and Assisters) associated to a CBO.
Medi-Cal Reason(s) *(If Medi-Cal program is checked)*	This list 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/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/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 data elements between 60 days prior to date of signature and the current date will be able to be viewed by the CBO. • No Case history – When selected, all 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'.
Signature of Applicant/Recipient	The applicant/recipient's signature on the CBO ROI form

Release of Information Attributes	
Attribute	**Description**
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 2.5.2.1.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
Short Description	CBO ROI Form Received
Long Description	An 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 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 2.5.2.1.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
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) 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 2.5.2.1 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 Hyland.
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 Hyland person drawer.
    b. For a customer with no existing case submitting an CBO ROI form with an application, store in the Hyland external staging drawer. The application, including the CBO ROI form, will be stored into the Hyland 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. If there is a high-dated Customer Privacy record for the Primary Applicant on the case, this data will not be sent to the CBO.
        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. Per SCERFRA 22-524, history of NOAs will not be released to a CBO/Assister.

Data Element	Program	Share Case History with CBO?	Description
			Note: The CBO – Notices API will be invoked to pull the list of NOAs for the CBO from all of the cases for the Customer, in the county.
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.
Benefit Award	CalFresh, CalWORKs	Yes	The authorized amount of the current EDBC results and issuance date will be shared to CBO/Assister. When 'The past 60 days' is selected, pull benefit award 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

Data Element	Program	Share Case History with CBO?	Description
			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 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 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: A 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 Type	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 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: Englishand 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 '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.

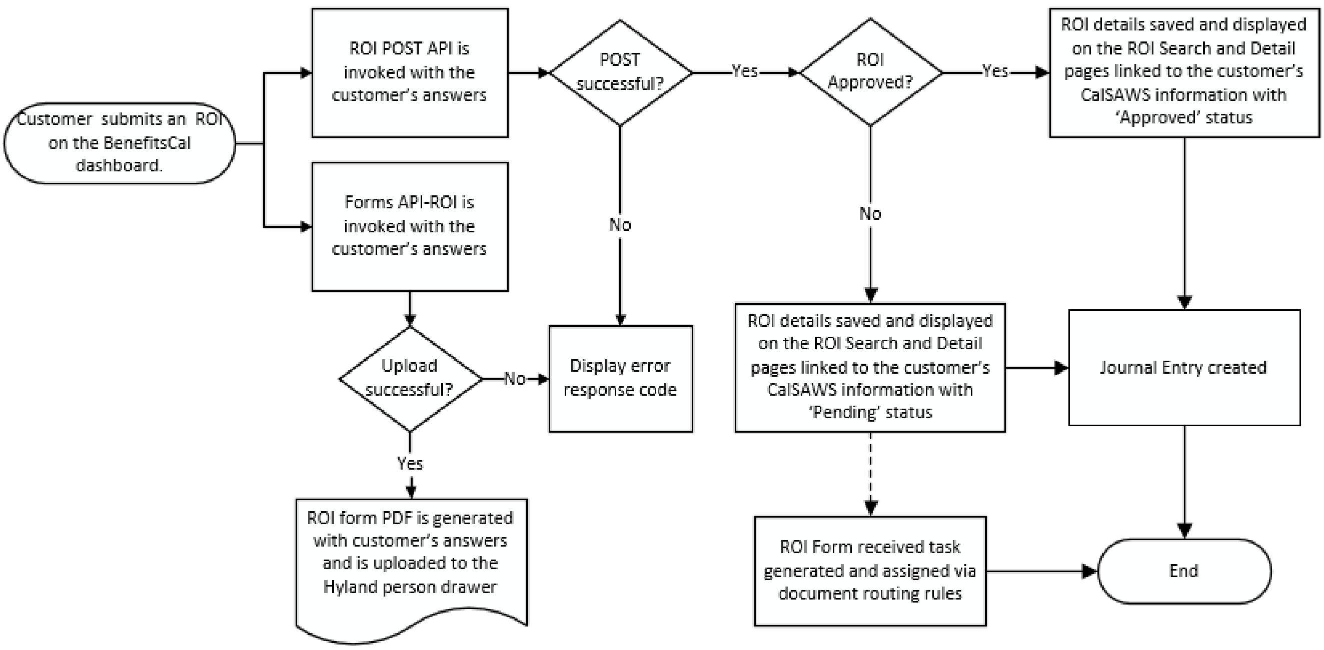
3 SUPPORTING DOCUMENTS

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	Interface	CBO-Case Details YAML	CBO-Case Details.yaml
9	Interface	CBO-Case Details HTML	CBO-Case Details.html
10	Interface	CBO-Notices YAML	CBO-Notices.yaml
11	Interface	CBO-Notices	CBO-Notices.html
12	Interface	Case Inquiry YAML	CaseInquiry.yaml
13	Interface	Case Inquiry HTML	CaseInquiry.html

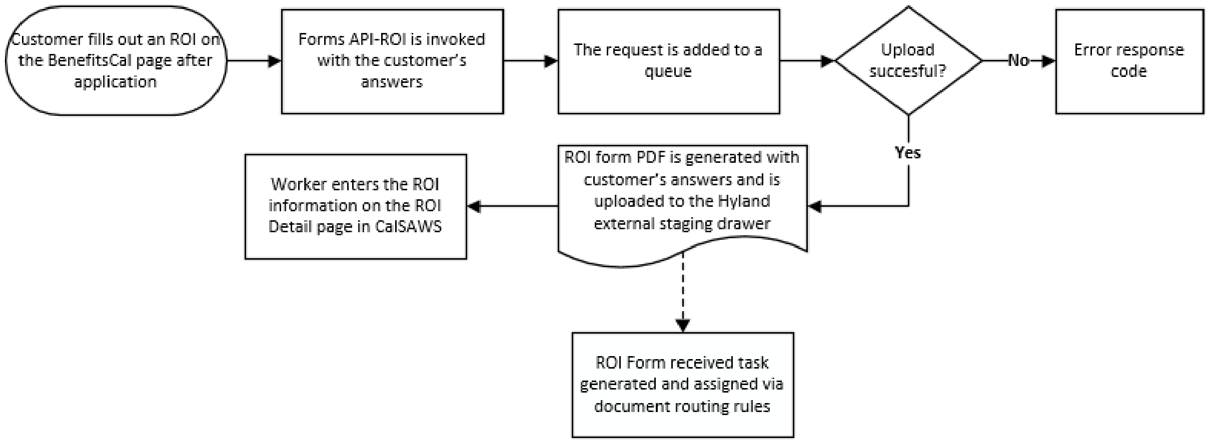
4 APPENDIX

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.

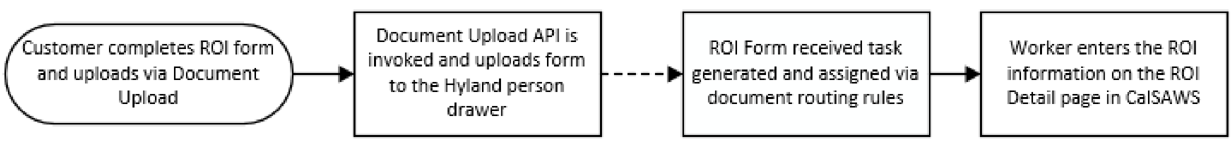
   a. Customer initiated ROI – Existing CalSAWS case and BenefitsCal account



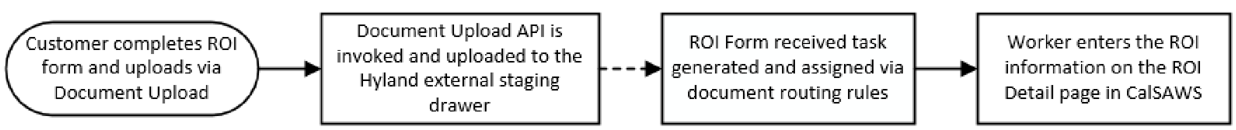
   b. Customer initiated ROI – No existing CalSAWS case with a BenefitsCal account – Applying for benefits (Manual Process)



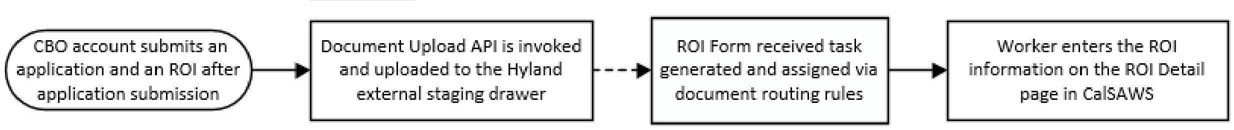
c. <u>Customer initiated ROI – Upload CBO ROI form from BenefitsCal account via Document Upload</u>



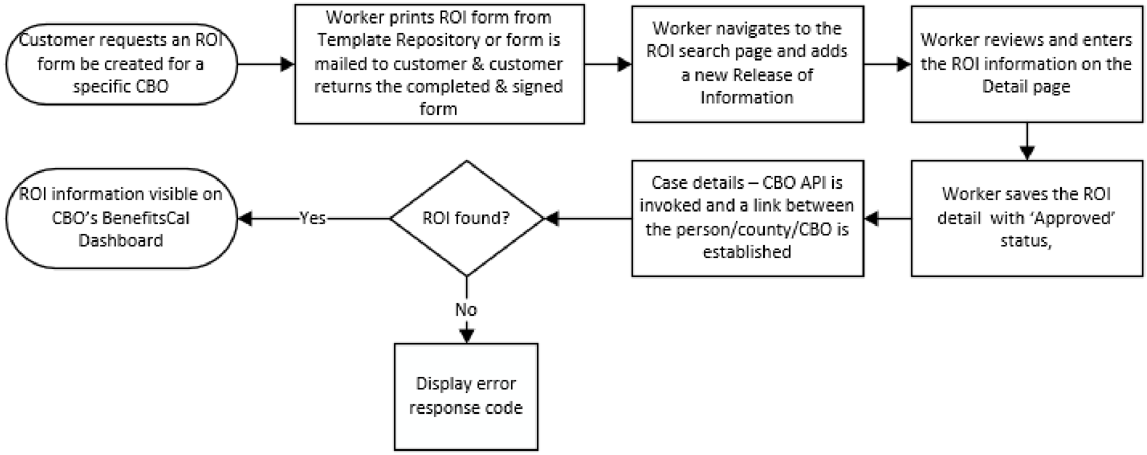
d. <u>Customer initiated ROI – As an Anonymous user and uploads CBO ROI form after application submission</u>



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



f. <u>County Worker initiated ROI – ROI record created upon Customer's Request</u>


Customer requests an ROI form be created for a specific CBO
Worker prints ROI form from Template Repository or form is mailed to customer & customer returns the completed & signed form
Worker navigates to the ROI search page and adds a new Release of Information
Worker reviews and enters the ROI information on the Detail page
Worker saves the ROI detail with 'Approved' status,
Case details – CBO API is invoked and a link between the person/county/CBO is established
ROI found?
Yes
ROI information visible on CBO's BenefitsCal Dashboard
No
Display error response code