

Date: December 6, 2022	Notes Location: Teams Meeting
Time: [10:00 am – 12:00 pm]	Meeting Materials:
Meeting Called by: Dymas Pena	
Attendees:	

## Topic

## Important Points

### County CBO point persons

- County CBO point person

- Technical list, includes name/phone number/email address for primary point of contact at CBOs for County
- Yes, Counties would like this list/information

### End to End Walk-through and discussion on ROI to COBs through BenefitsCal

- Updates on design or ROI for CBOs
- Scenario 1A
- Scenario 1B
- Scenario 2
- Scenario 3
- Scenario 4
- Scenario 5
- Scenario 6

- Various scenarios were reviewed
- Scenario 1A – customer completes digital ROI in BenefitsCal account. Customer and COB can see information in dashboard immediately (if primary application information – name/date of birth is verified.) ROI is linked to case in CalSAWS
- 1B- customer completes ROI in BenefitsCal but name/dob is not verified, customer and CBO will not see case information until ROI is reviewed by worker in CalSAWS. ROI list page/ROI detail page will show ROI as pending – this will be flag to worker to review. County document routing rules will determine if task will be set for worker.
- Scenario 2 – customer completes paper ROI form, uploads form through documents in BenefitsCal. ROI will not be visible to customer/COB until processed by worker in CalSAWS. Customer will get link to complete digital ROI and will be informed that ROI uploaded in documents will be linked to all cases with County. Worker will complete ROI page in CalSAWS.
- Scenario 3 – CBO uploads ROI document in BenefitsCal – Customer has completed paper ROI and turned into CBO with application. ROI is uploaded as part of the application – e-application. Case information will not be visible to CBO until application is processed by worker in CalSAWS. Worker fills out ROI page in CalSAWS.
- Scenario 4 – CBO uploads ROI, not with application, document only. CBO will be notified that ROI will be linked to all County cases. CBO cannot see information in dashboard until Worker has reviewed, Worker will complete ROI page in CalSAWS case.
- Scenario 5 – ROI ends by customer. Customer revokes ROI in BenefitsCal account. Will automatically update in customer and OCB's dashboard. COB will not have access to case information.
- Scenario 6 – expired ROI. CBO sees expired ROI, cannot access case information, contacts customer to let them know. Customer's BenefitsCal dashboard tells customer

## Topic

## Important Points

ROI for CBO has expired and what that means.  
Customer can complete new ROI.

Batch run will take place day before expiration date,  
batch will expire/remove CBO access from case  
information for expired ROIs.

If customer submits new ROI, then old ROI will be  
automatically revoked – only one ROI per CBO.

This is not the final version – if any question or concerns  
please contact committee

### CERCA252942

- 3 new BI reports on CalSAWS for BenefitsCal

- CalSAWS has BenefitsCal reports - requesting updates to reports
- #1 – number of CBOs for each county – this is forge rock data – will be taken back to determine if this is a viable request
- #2 – how many BenefitsCal customers – regions voted to forward this as a separate enhancement for CalSAWS – CFR opened
- #2 will be moved to CalSAWS
- #3 – how may/how often customers request verification of benefits – this is being taken back

### CER CA-250996

- RCA Application selection separate in BenefitsCal

- Request made to have a separate option for an RCA application – separate from the CalWORKs application option
- Will be able to process RCA applications more efficiently
- Ticket sent – CSPM# 62138

- Open Discussion

- Question – SAR 7/CF RE are being linked to closed cases through BenefitsCal, customers are thinking they are sending a new application
- Time frames are sent to BenefitsCal currently if reports are beyond the 30<sup>th</sup> day – ticket may need to be sent
- Melissa – need case numbers to review – will send ticket with case numbers
- Quesiton – is it possible to do name change through BenefitsCal – at log-in. name is displayed through case data in CalSAWS
- Ellie – will need to take back as action item

(Optional Items)

#	Action Item	Assigned To	Assigned Date	Due Date	Status
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1

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2

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#	Decision Made	Who Made the Decision	Date
1			
2			

