CalSAWS | Notes from Self-Service Portal Committee

Date: October 03, 2023	**Notes Location:** Teams Meeting
Time: 10:00 am – 12:00 pm	**Meeting Materials:**
Meeting Called by: Dymas Pena	
Attendees: Roll call completed	

Topic	Important Points
CA-Review from An Mai/Gillian • CA-21398/CSPM-65844 New BenefitsCal API to Support Unlink Presentation	• Relink request to a different account will generate a manual case link request for a worker to complete • Currently a Task will not be created for the new case link request. • CBO's keep linking to different email accounts and could potentially be a breach of Security. • Suggestions on how to get the system to re-link without the worker having to complete a manual case link. • Request to leave it at Case link instead of name link
CA-Gillian **CA-260798 Update e-Application Search Page** • Reviewed Design Document **Voting Due 10/13.** Release Date End of 11/23	• Enhancing Search page to allow the worker to search by zip code • Remove the General Assistance/General Relief and CMSP under the program search • Allow the worker to assign the e-Application to themselves and to other workers. Special Security added for this functionality. • Added the Worker ID to the Search Results Summary as a Hyperlink to the staff detail page. • Adding a Source Dropdown to the e-application search
Anonymous Document Upload- Mufaddal **CSPM-67119: Anonymous Document Upload** • Reviewed proposal Release coming in 11/30/23.	• Allow BenefitsCal users to upload documents through BenefitsCal without an account • Nudge customer to create accounts. • Access documents through Apply for Benefits, manage my Benefits, Help Center and Chatbot. • Discussion about individuals erroneously requesting to be CBOs for counties thinking they are applying or requesting to access documents. This doesn't apply to this issue but can be looked at.
CA-208406 Identify SSA Assisted Applications Identification from SSP – Mufaddal/Gillian • Reviewed Design Document – **Voting due October 13th.**	• SSA applications sent through CalFresh. Allow BenefitsCal to submit applications. • Come over to counties with an indicator to display the "SSA-assisted" with a Yes, No or Blank with the organization as Social Security Administration. Blank means the data wasn't available at that time.

Topic	Important Points
	• Update Origin to include Governmental Agency, CBO, Anonymous user, Portal user.

Ended meeting. Not enough time to discuss **Flexible Block Appointments Updates in BenefitsCal** so will be discussed at next meeting.