

# CalSAWS | Notes

Meeting: Self-Service Portal Committee Meeting

Location: Teams

Date: October 07, 2025

Time: 10:00 AM – 12:00 PM

Attendees: **Region 1:** Alli Muller, Josephine Chew, Karen Elizondo

**Region 2:** Chelsea Carson, Julia Scheuermann, Kim Casalta, Tiffany Frey

**Region 3:** Janna Ricketts, Julia Foster, Nelia Green-Goodwin

**Region 4:** Felicia Borquez, Kayla Pancoast, Monique Micenheimer, Ruben Robles Rodriguez, Leticia Arroyo for Yesenia Burdick

**Region 5:** Arianna Bernal, Belinda Lemos, Juan Ojeda, Mary Cisneros

**Region 6:** Carlos Agreda for Javier Garcia Rivera, Kristy Rosas, Lilit Afrikyan, Natalie Stanko

**CalSAWS:** Araceli Gallardo, Dymas Pena, Melissa Mendoza, Brian Munce, Sam Le, Jennifer Muna, Gillian Bendicio, Carly Wellener, Nue Nelson, Supritha Sundaram, Joel Acevedo, Jennifer Hobbs, Ben Hamilton, Ishita Chitturi, Matthew Vandereyck, Marsale Eramya, Sajjan Shah, Jerry Hernandez

Lead	Topic	Notes
Araceli	<b>Attendance/Updates</b>	<ul style="list-style-type: none"><li>Region 1 is Responsible for Notes</li><li>Note taker: Teri Howe – Contra Costa</li><li><b>Disclaimer:</b> The use of Artificial Intelligence (AI) solutions, including AI bots or assistants, transcriptions, or recordings, is prohibited in all CalSAWS meetings without prior authorization, according to the CalSAWS Artificial Intelligence Policy. ADA assistive devices are not prohibited by this policy.</li></ul>
Araceli	<b>Deloitte Self-Service Portal Team Introduction</b>	<ul style="list-style-type: none"><li>Introduced Deloitte Self-Service Portal team members – Sajjan, Carly, Brian, and Finnegan</li></ul>
Carly	<b>SCR Design Walkthrough</b> <ul style="list-style-type: none"><li>■ <b>CA-292880</b> New Person Detail page to display side-by-side comparison of person data</li></ul>	Release 26.01 <ul style="list-style-type: none"><li>This change updates the New Person flow to be easier for workers by adding a comparison-view of the searched-for values from the New Person Search page and the selected Person from New Person Search Results page on the New Person Detail page.</li><li>It makes it easier to compare what the original search criteria was entered compared to the selected known CalSAWS person.</li><li>Makes it easier to return to the original search (if the selected is incorrect). Added Close buttons in View mode and Cancel buttons in Edit mode.</li></ul>

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		<ul style="list-style-type: none"> <li>There was a question about the tree icon, if it could provide purpose definition when hovered over. <ul style="list-style-type: none"> <li>Clarification on "tree" icon this information is the searched-for values on the New Person Detail page and is not retained in the system.</li> <li>PowerPoint to be shared after the meeting.</li> </ul> </li> </ul>
Ishita	<b>BenefitsCal Enhancements</b> <ul style="list-style-type: none"> <li><b>CSPM-79311:</b> Consolidate Document Upload Functionality Across the BenefitsCal System</li> </ul>	Release 25.09.25 <ul style="list-style-type: none"> <li>Enhancements to improve consistency and learnability</li> <li>Enhancements for both customers and CBO's to align with multiple areas related to Document Upload with one another</li> <li>Improves consistency and learnability of Document Upload in BenefitsCal</li> <li>Verbiage change from Upload Another Document to Upload More Documents</li> <li>All buttons with the text Upload More Documents or Upload Documents direct user to the beginning of the flow for uploading documents</li> <li>Added a link for CBO to see past submitted documents</li> </ul>
Ben	<b>BenefitsCal Enhancements</b> <ul style="list-style-type: none"> <li><b>CSPM-75629:</b> Document Upload - List of Options</li> </ul>	Release 25.10.30 <ul style="list-style-type: none"> <li>Currently there are about 40 document type options in BenefitsCal. Resulting in customers being unsure of the option to select and defaulting to Other.</li> <li>Enhancement to reduce the initial document options and guide customers to the more appropriate document type. <ul style="list-style-type: none"> <li>Based on the primary category selected a subcategory dynamically lists related subcategories.</li> </ul> </li> <li>The categories are customer facing and do not impact the current imaging mapping</li> <li>Customers may add a note to an image being uploaded</li> </ul>
Ishita	<b>BenefitsCal Enhancements</b> <ul style="list-style-type: none"> <li><b>CSPM-81491:</b> Modify the MC RE process to include the MC</li> </ul>	Release 25.10.30 <ul style="list-style-type: none"> <li>To accommodate New policy updates from DHCS which requests the MC 604 IPS form regarding assets</li> </ul>

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	604 Property Information Insert	<p>be included with Medi-Cal Renewals due in January and February 2026.</p> <ul style="list-style-type: none"> <li>Temporarily allow customers to download and submit the MC604 IPS form during the Medi-Cal Renewal flow on BenefitsCal</li> <li>A new flow allows users to download the MC604 IPS and upload after completing it.</li> <li>Help text and tooltip on initial screen provides customer context for the MC 604 IPS and why.</li> </ul>
Dymas	<b>Open Discussion</b> <ul style="list-style-type: none"> <li> <b>CA-294267</b>            Enhance e-Application Office Routing Functionality         </li> <li> <b>Question – Who approves CBO?</b> </li> <li> <b>Question – How are counties reviewing tax filing statuses for MC applications?</b> </li> </ul>	<ul style="list-style-type: none"> <li>Release 26.05</li> <li>CA-294267 Enhance E-Application office routing functionality by zip code. Anticipate leveraging the existing homeless address functionality               <ul style="list-style-type: none"> <li>Counties would have configuration access to assign zip codes to offices and to turn on or off the functionality.</li> <li>Primarily this could help counties that distribute cases to offices based on customer's physical location to office. A secondary benefit, this could also reduce applications being received in a county the customer doesn't reside in.</li> </ul> </li> <li>Have not changed how CBOs are entered into the system. Each county enters them.</li> <li>San Mateo County - Reported they have noticed when a client applies for MC through BenefitsCal, the SAWS 2 generated does not specify their filing status (e.g., single, head of household, or married separately).               <ul style="list-style-type: none"> <li>Are counties requesting an RFTHI in these cases?                   <ul style="list-style-type: none"> <li>Response - If we are not able to get a hold of the client we send out a request asking the RFTHI be completed.</li> <li>In Kern, we send out the RFTHI if unable to contact on the phone.</li> </ul> </li> </ul> </li> </ul>
Araceli & Dymas	<b>Farwell to our Accenture Self-Service Portal Team</b>	<ul style="list-style-type: none"> <li>Thank you to our Accenture SSP team – Melissa, Gillian, Jen, and the rest of the team - for their</li> </ul>

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		<p>partnership and all their contributions they've made to this project.</p> <ul style="list-style-type: none"> <li>• <b>Next Meeting: 12/02/25</b></li> </ul>

### Follow Up

#	Action Item	Who	Due
1			
2			

#	Decision Made	Who	Date
1			
2			