

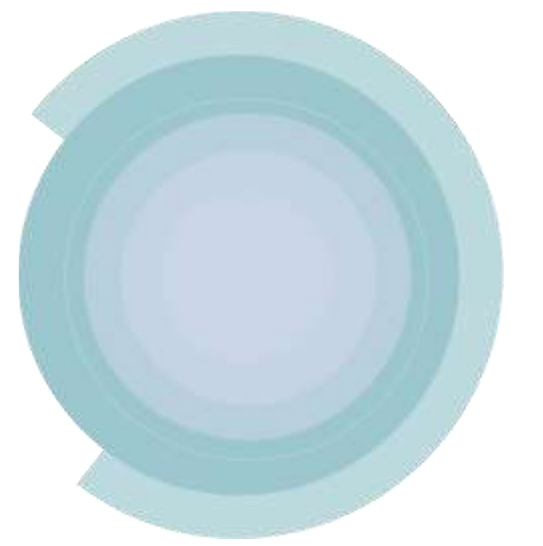


BenefitsCal Workgroups

HR1 Requirements

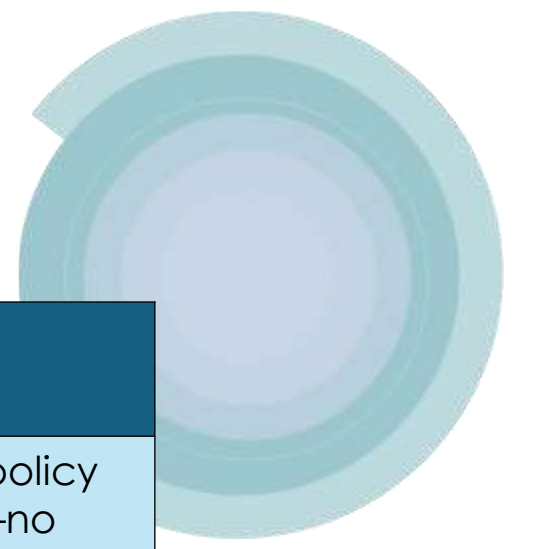
ABAWD BC Workgroup

CSPM – 80744: ABAWD Time-Limits Exemption – Release 26.04.30



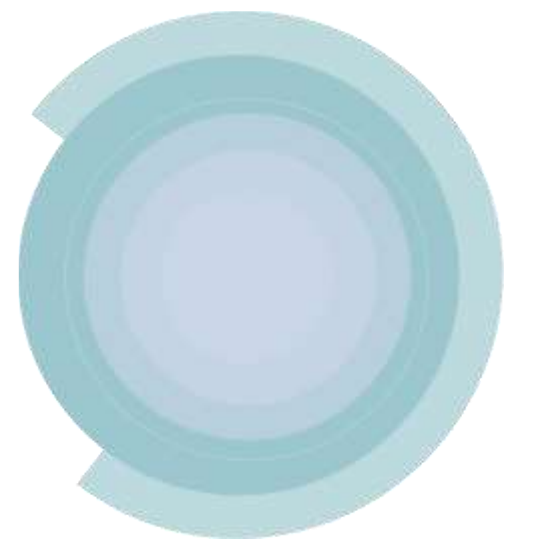
Area of Design	Comment	Suggestion	Requirement	Status/Next Steps
Clear Wording & Communication	Why is this screen discouraging requesting an exemption? Remove the language saying "Most people don't need to add this information" as it is counterproductive to protecting eligibility.	Again, exemption screening should be the priority, not an afterthought after going through all the work time tracking. This should also allow for a "Not sure" answer that then sends the person to a screener. We REALLY need to encourage exemptions, not discourage them. And we want to encourage people to protect their eligibility in multiple ways; if one thing changes, another thing can keep them eligible.	BenefitsCal shall avoid phrasing that could discourage customers from reporting work hours (e.g., removing "most people..." language where it implies reporting is unnecessary).	This item will be included in the policy update, effective June 1, 2026—no further action is needed. See row 18.
Clear Wording & Communication	The prompt has "Program Name" and "Total hours attended per work." First, is "program name" the right term to use for employment or does that only apply to training program? And, what if a recipient has multiple jobs or training programs? Will they be able to enter all program names and hours, to capture real life dynamics?	1) Suggest using the term "job/program name" to encompass both scenarios. 2) Make sure that multiple jobs/program names and hour slots for each related program can be captured as in real life, people might need to braid activities and hours per the "combination" framework being permitted in law, and as stated by CalSAWS in previous screens. Especially since we are telling people that they can provide a combination of activities to meet the requirement.	a) BenefitsCal shall label the employment field using customer-friendly terms such as "Agency or Organization" (rather than "Program"), where appropriate. b) BenefitsCal shall allow customers to enter multiple organization names for employment or work training participation.	a) This item will be considered as a possible future enhancement. Please assign its priority ranking relative to the other items on this list. b) This item will be included in the policy update, effective June 1, 2026—no further action is needed.
Clear Wording & Communication	Community service "this can be at a school, religious organization, or home setting" doesn't include a lot of other things that could count toward this.	There's a lot of better language for this out there. It should at least include the phrase "for example", if that is within the appropriate reading level	Lists of community service examples shall explicitly state they are examples and not a complete list.	This item will be included in the policy update, effective June 1, 2026—no further action is needed.
Idea Bank	This exemption needs to be included: Participating in an Office of Refugee Resettlement (ORR) training program for at least half time. Currently not in figma.	Update the exemption list and review with advocates and state partners	The exemption list shall include an option for customers participating in an Office of Refugee Resettlement (ORR) training program, where allowed by policy.	This item will be included in the policy update, effective June 1, 2026—no further action is needed.

ABAWD BC Workgroup



Area of Design	Comment	Suggestion	Requirement	Status/Next Steps
Portal Features & System Experience	Only one slots for community service or volunteer indicated in figma.	Make sure that multiple organization names and hour slots for each community service or volunteer opportunity can be captured as in real life, people might need to braid activities and hours per the "combination" framework being permitted in law, and as stated by CalSAWS in previous screens. Especially since we are telling people that they can provide a combination of activities to meet the requirement.	BenefitsCal shall allow customers to enter multiple organization or individual names associated with a community service or volunteer activity.	This item will be included in the policy update, effective June 1, 2026—no further action is needed.
Portal Features & System Experience	Calling out for multiple organizations but also reference for volunteering/supporting an individual versus an organization (defer to policy)		<p>Allow for a customer to enter multiple organization names for their community service or volunteer opportunity.</p> <p>Update the language where multiple organizations is called out to indicate this may be an organization or individual.</p>	This item will be included in the policy update, effective June 1, 2026—no further action is needed.
Clear Wording & Communication	Is caring for a person who needs help caring for themselves. This person does not need to live with them.	Is caring for a person who needs help caring for themselves because they are disabled or do not have capacity. This person does not need to live with them.	BenefitsCal shall clarify that the dependent is not required to live in the household (if consistent with policy for the specific question/context).	This item will be included in the policy update, effective June 1, 2026—no further action is needed.
Clear Wording & Communication	"Has a physical or mental health issue that make it hard for them to work. ABAWDs are expected to work, volunteer, or participate in training programs for at least 20 hours per week or 80 hours per month." Also needs clarification if this category here is for those unfit to to work based on worker observation, or medically determined, or both and how either will be automated and determined on the other end. If this is also assessing for medical determination, how will the doctor's verification be provided to recipient and will that be automatically triggered or manually applied by a worker? It is better if this becomes automatic for the system to send out relevant forms to people if medical verification is needed.	Remove the language about what "most people" do. we want to encourage people to protect their eligibility in multiple ways; if one thing changes, another thing can keep them eligible.	BenefitsCal shall avoid phrasing that could discourage customers from reporting work hours (e.g., removing "most people..." language where it implies reporting is unnecessary).	This item will be included in the policy update, effective June 1, 2026—no further action is needed.
Clear Wording & Communication	Does the system allow recipients to capture all exemptions that could apply and safe it, or are they limited to choosing only one exemption. Best to have multiple exemptions document to leverage all options and to let workers know this so that if one exemption does not work, they can move onto another.	Remove the language about what "most people" do. we want to encourage people to protect their eligibility in multiple ways; if one thing changes, another thing can keep them eligible.	BenefitsCal shall avoid phrasing that could discourage customers from reporting work hours (e.g., removing "most people..." language where it implies reporting is unnecessary).	This item will be included in the policy update, effective June 1, 2026—no further action is needed. See row 18.

Medi-Cal BC Workgroup

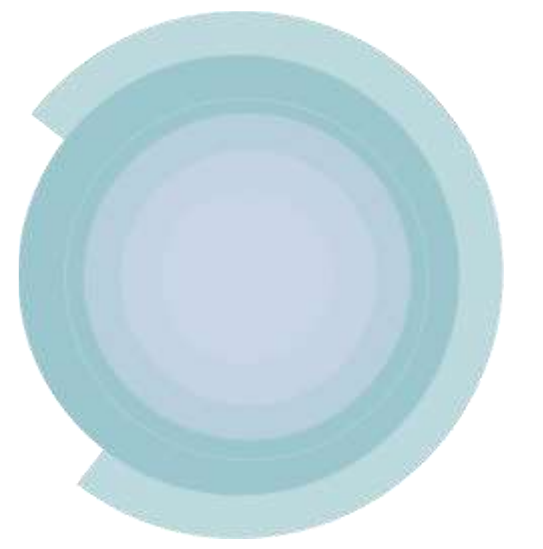


CSPM-80930: Retroactive Medi-Cal Update (26.06); CSPM-80929: Semi-Annual Redeterminations – MAGI (26.09)

CSPM-80928: Work Requirements - MAGI (26.09);

Area of Design	Comment/Suggestion	Requirement	Status/Next Steps
Retroactive Medi-Cal	Update the copy for the card selection of retroactive Medi-Cal. Currently, it is phrased as “Help paying...”	BenefitsCal shall use clear, customer-friendly language for retroactive Medi-Cal that includes the term health coverage.	This item will be included in the policy update, effective January 1, 2027—no further action is needed.
Retroactive Medi-Cal	Include language that retroactive Medi-Cal can be requested up to year	BenefitsCal shall inform customers that retroactive Medi-Cal may be requested for up to one year.	This item will be included in the policy update, effective January 1, 2027—no further action is needed.
Retroactive Medi-Cal	<p>Include language where potentially for retro coverage if there have been bills paid within those 1-2 months</p> <p>Recommended Possible Language: Would something like "help covering a bill, paid already or not", work?</p> <p>Recommended Possible Language: "paid or unpaid medical bills"?</p>	BenefitsCal shall explain that retroactive Medi-Cal may help cover paid or unpaid medical bills for the requested period.	This item will be included in the policy update, effective January 1, 2027—no further action is needed.
Retroactive Medi-Cal	Language surrounding gaps in coverage for retroactive coverage. In previous discussions regarding the possible penalties for losing coverage. Connect with policy partners for this language.	BenefitsCal shall explain that retroactive Medi-Cal may help cover gaps in health coverage, consistent with policy guidance.	This item will be included in the policy update, effective January 1, 2027—no further action is needed.
6-Month Redetermination	Guiding language should be present for these changes going forward.	BenefitsCal shall clearly inform customers in the new MAGI Adult group that their renewal period has changed to a 6-month redetermination.	This item will be included in the policy update, effective January 1, 2027—no further action is needed.

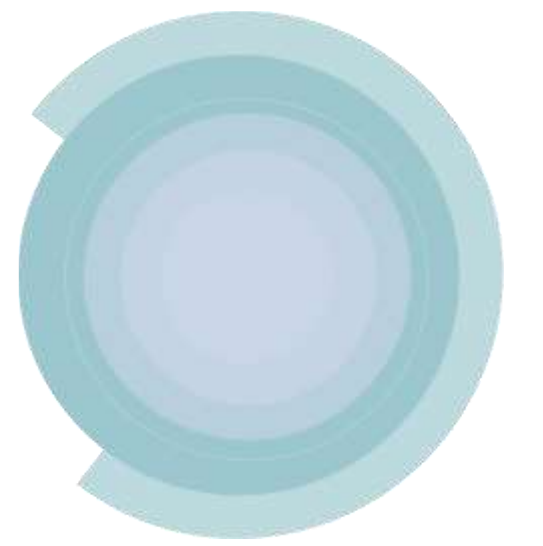
Medi-Cal BC Workgroup



Area of Design	Comment/Suggestion	Requirement	Status/Next Steps
6-Month Redetermination	Adding language indicating that the change from an annual renewal to a 6-month renewal. This could be included in a pop-up.	BenefitsCal shall inform households with a MAGI New Adult Group member that the member's Medi-Cal renewal occurs every 6 months instead of every 12 months.	This item will be included in the policy update, effective January 1, 2027—no further action is needed.
Work Requirements	Comment regarding implementing a system that will identify who will be expected to meet work requirements a clear definition of what is considered approved "Work/activities"	BenefitsCal shall clearly define which activities count toward work requirements.	This item will be included in the policy update, effective January 1, 2027—no further action is needed.
Work Requirements	Present exemptions and requirements questions, only when they have not collected prior in the application. Prefer semi-dynamic would prefer to have customers who are subject to HR-1 Medi-Cal requirements for whom prior answers in this application that do not indicate an exemption applies.	BenefitsCal shall present work requirement and exemption questions only when they are relevant and have not already been answered earlier in the application.	This item will be included in the policy update, effective January 1, 2027—no further action is needed.
Work Requirements	If information is captured previously, then attempt to not display. However, there may be an opportunity to have a safety net or a call out elsewhere so for customers do have the opportunity to call out an exemption that applies. Call out the minimal questions asked in CalHEERS (Covered CA) for these items while still offering resources.	a) BenefitsCal shall avoid repeating information or questions that have already been collected earlier in the flow. b) BenefitsCal shall provide a later review step or callout in the flow that gives customers an additional opportunity to indicate an applicable exemption.	a) This item will be included in the policy update, effective January 1, 2027—no further action is needed. b) This item will be considered as a possible future enhancement. Please assign its priority ranking relative to the other items on this list.
Work Requirements	Whenever notes are included for references copy needs to be evaluated and considerate for the language that is used.	BenefitsCal shall use clear, easy-to-understand language wherever reference or explanatory text is shown.	This item will be included in the policy update, effective January 1, 2027—no further action is needed.

Truv BC Workgroup

CSPM-81960: TRUV – Income and Employment Verification (26.07)



Provide information about Truv, consent, and data

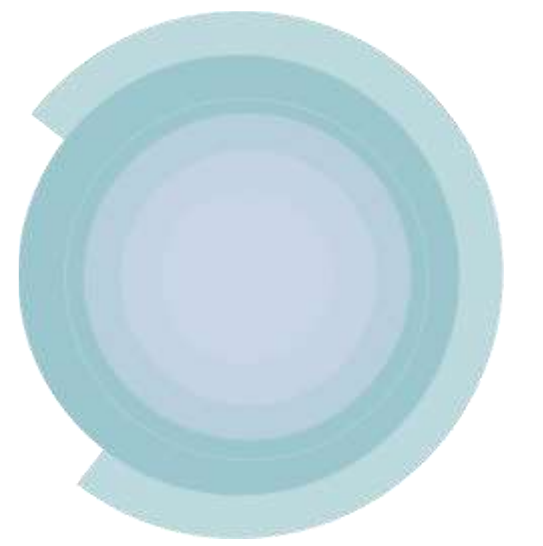
- Provide **plain-language upfront overview** of what Truv does and what options the user will have.
- Information around consent and data should be provided:
 - What the user is consenting to** (data types and purpose of use)
 - Who will access** the data (e.g., agency/case worker)
 - Where the data goes** (into the application/verification workflow) and **how it will be used**
- Include **examples** to help users understand what they're choosing and why.

Provide guidance to the user

- Provide guidance on **which option to choose**:
 - Payroll provider connection
 - Financial institution connection
- If the user **can't find their provider**, present clear alternatives (e.g., try financial institution, manual entry) and what to do next.

Truv BC Workgroup

CSPM-81960: TRUV – Income and Employment Verification (26.07)



Help text and in-flow support

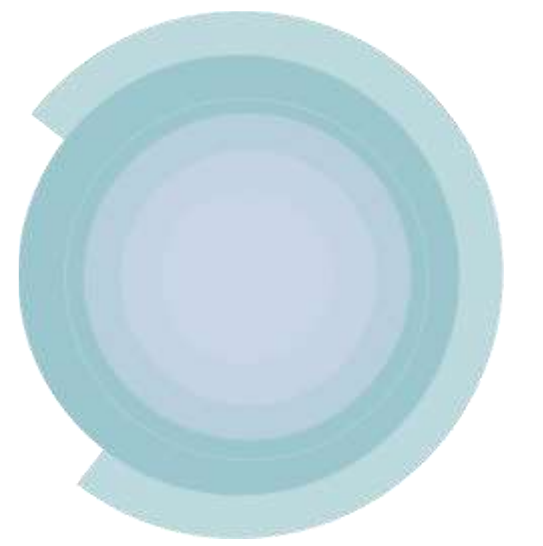
- Add helpful content for common issues:
 - Where to find payroll / earned income details
 - How to set up/connect payroll
 - What information is needed (e.g., selecting the correct payroll system)
 - Forgot username/password recovery pointers
- Provide tooltips or a ‘Need help?’ link at key steps.

Reporting changes & discrepancy handling

- Add calming, supportive language explaining:
 - What “report changes / discrepancies” means
 - What the user can do if something looks wrong
- Allow users to report an issue and include a reason (free text and/or dropdown).

Truv BC Workgroup

CSPM-81960: TRUV – Income and Employment Verification (26.07)



Entry points, triggers, and overall flow behavior

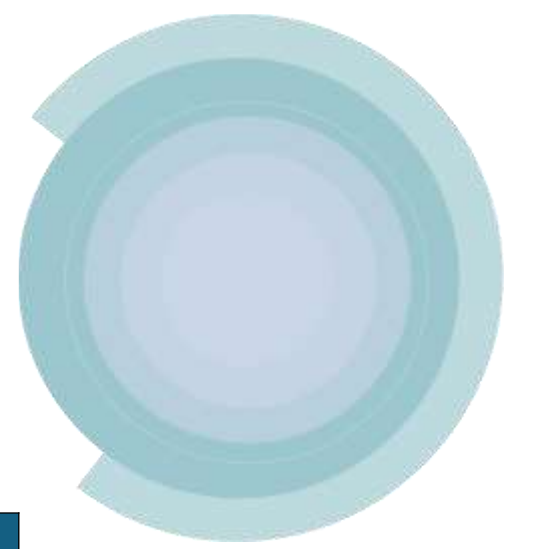
- Reduce friction:
 - Support **multiple entries/returns** during the AFB flow
 - Identify opportunities to **reduce clicks**
- Return/continuation behavior:
 - Define how users **come back** after consenting and where they land
 - Provide clear options to **go back or abandon/cancel Truv**

Data review, step-by-step validation, and confirmation

- Provide a **step-by-step validation** experience, with the option to consent **per employment item** (one-by-one) if multiple employers exist.
- Provide a clear **snapshot/summary** of what was found/used, including guidance on what counts as:
 - Regular payments
 - Income that will be counted toward eligibility
- End-of-flow requirement: a strong **confirmation of verification** at completion.

CalFresh Processing BC Workgroup

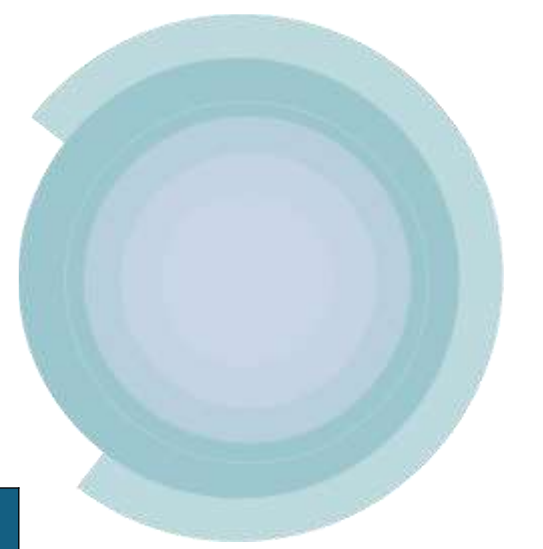
Captured requirements



Key Themes	Grouping	Requirements	Combined Ranking
System processes / errors	Upload functionality	Provide status notifications (i.e., text/email) when in review and reviewed/accepted or needs more info	1
Customer confusion around terms/wording used	Clear language & tooltips	Key-term tooltips and examples for income topics (gross/net, pay schedule terms, IRT, self-employment vs other types of income, shelter expenses)	2
System processes / errors	Notifications and tracking	Notifications/tracking for SAR-7 (QR/link), last-reported status, due-date reminders, processing updates with action links	3
Customer confusion around terms/wording used	Definitions & examples topics	Short explanation video for IRT	4
Lack of support/resources/access	Income support	Provide clear prompts to monitor, track, and report income changes	5
Inconsistent directions/instructions	Clarity around child support-specific questions	Clarify whether households should report the total child support amount received, and/or the amount received after the child support disregard	6
Lack of support/resources/access	Income support	Guidance with proof-of-income retrieval instructions	7
Lack of support/resources/access	Income support	Include examples of how fluctuating income is averaged for eligibility	8

CalFresh Processing BC Workgroup

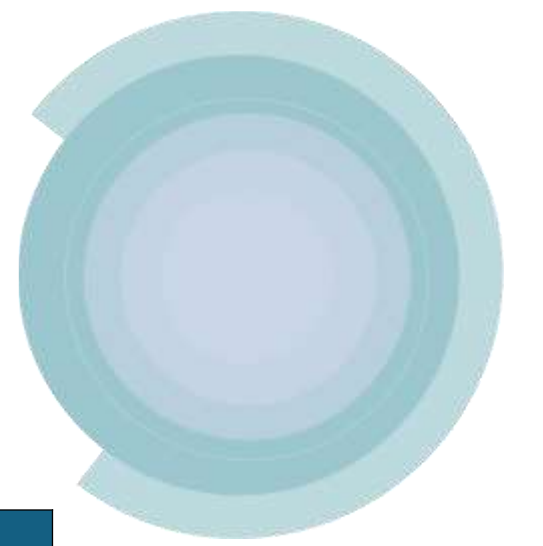
Captured requirements



Key Themes	Grouping	Requirements	Combined Ranking
System processes / errors	Notifications and tracking	Pre-submit automated review of information entered as part of application to identify potential error causes and prompt customer to review	9
Lack of support/resources/access	Income support	Pay-stub examples	10
Lack of support/resources/access	Income support	Support variable income via ranges/recent pay	11
Lack of support/resources/access	Income support	Income entry tools for customers that are gig/commission workers (e.g., earnings logs)	12
Customer confusion around terms/wording used	Definitions & examples topics	Provide clear definitions around “household” per program	13
Lack of support/resources/access	Income support	Optional “expected changes” field	14
Lack of support/resources/access	Income support	Guidance/templates for requesting pay-stub details from an employer	15
Customer confusion around terms/wording used	Definitions & examples topics	Distinguish direct vs state-collected child support and provide examples	16
Inconsistent directions/instructions	Clarity around child support-specific questions	Modify conditional questions to guide the customer to the correct reporting category, clearly specifying child support income or expense	17

CalFresh Processing BC Workgroup

Captured requirements



Key Themes	Grouping	Requirements	Combined Ranking
Customer isn't aware of what they're required to report	Distinction between required and optional questions	Overview of how eligibility is impacted by the information gathered and note that no question is mandatory for the application	18
Inconsistent directions/instructions	Consistent guidance	Cross-program rule clarity (e.g., CalFresh vs CalWORKs IRT; dual recipients)	19
Customer confusion around terms/wording used	Clear language & tooltips	Provide scenario guidance for application, SAR 7, SAR 3, and re-certification	20
Customer isn't aware of what they're required to report	Distinction between required and optional questions	Move demographic questions into separate section to distinguish they are not part of the required set	21
System processes / errors	Upload functionality	Add document preview thumbnails	22
System processes / errors	Notifications and tracking	Before applications submission, check for potential prior applications and notify applicant when appropriate	23