

16. Self-Service Technologies & Communications

16.1 MyBenefits CalWIN (MyBCW)

MyBenefits CalWIN (MyBCW) is a web application that allows the general public and clients to self-screen for potential eligibility, apply for benefits and complete their periodic reports and redeterminations/recertification online for CalWORKs/RCA, CalFresh, and Medi-Cal programs.

MyBCW, located at <https://www.mybenefitscalwin.org/>, is the web version of the paper application, periodic report and redetermination/recertification process.

16.1.1 Benefits of MyBCW

MyBCW provides clients with around the clock access to the following benefits:

- Basic screening for potential eligibility,
- Apply for benefits
 - CalWORKs
 - CalFresh
 - General Assistance and,
 - Medi-Cal
- Complete their periodic reports and recertification
- Attach verifications online.
- Access current and last 6 months of benefits information
- Check EBT balance
- Check case status
- BIC Medi-cal card replacement
- Verification of benefits
- Request automated password resets
- View renewal/recertification due date
- Access the National Voter's Registration website
- Contact a worker by e-mail (e-mails will be sent to a centralized e-mail box)
- Access to the EBT website through a link
- Review and print documents sent by their worker
- Verify information on a document is correct
- Notify worker when the information on a document is incorrect
- Sign a document by agreeing with the terms.



Note:

Applications submitted during after hours, weekends or holidays will be marked "Received" the next business day, the same as dropped off or mailed in applications.

16.1.2 Languages

MyBCW is currently available in eighteen languages including, English, Chinese, Russian, Spanish and Tagalog.

16.1.3 MyBCW User Accounts

Users must create MyBCW accounts in order to access the MyBCW services. When setting up the account, users are required to choose a User ID and Password.

16.1.4 Contact a Worker by E-mail

After a client has been approved for public assistance benefits, or becomes a recipient, the client is able to send the county an e-mail message. The client must have created a MyBCW account.

The following table shows the process for a client to submit a request for a county representative to contact them.

Stage	Who	Action
1.	Client	<ul style="list-style-type: none"> • Logs into their MyBCW account and selects [Benefits] tab. • Selects [Contacts] tab under the [Benefits] tab. <p>“Have a County Representative Call Me” box will appear.</p> <ul style="list-style-type: none"> • Client will select one of the seven predefined reasons: <ul style="list-style-type: none"> • Your case is in discontinued status, your benefit amount has changed or your BIC/EBT card is not working. • You applied for benefits and need to know whether your benefits have been approved or denied. • You received a letter in the mail from the county and do not understand the letter. • You have not received your check for Books, School Supplies, Transportation or Child Care referral. • You can not make it to a scheduled appointment. • You have left messages for a county representative to call and have not received a call back, and you need to speak to someone about your case. • Other reasons. • Enters phone number where they can be reached.
2.	MyBCW	Generates an e-mail and routes it to the appropriate District Office based on caseload number.
3.	Auto-mated Process	Auto-creates a Transaction Management Tool (TMT) request under category “DOCPROCESSING.MyBCW” for assignment to an assigned EW or bank caseload for each contact request received.

Stage	Who	Action
4.	EW	Calls the client within 2 business days from the date the e-mail is received by the county.

**Note:**

The Office Management Coordinator (OMC) or Social Services Program Manager (SSPM) must include an e-mail address for routing of MyBCW generated e-mail when submitting Unit Registration Form, SCD 191 or the CalWIN Security Change Request Spreadsheet, for all new or changed caseload numbers and submit to CalWIN Application and Transition Support (CATS) to ensure all MyBCW generated e-mails are routed to the appropriate District Office.

16.1.5 MyBCW Actions

MyBenefits CalWIN (MyBCW) Actions allow workers the ability to create a Case Level Action in CalWIN for clients to view and complete in MyBCW. There are three different MyBCW Actions:

- Information to Client,
- Request Information from Client, and
- Signature Needed.

16.1.6 “Information to Client” Action

Workers may send information/documents to the client from CalWIN to MyBCW. To begin the action of sending information to a client, the worker will open the **Maintain Case Actions** window, select the type of action needed from the **Action Type** field and choose **Information to Client** from the drop down menu.

The types of documents that can be sent to clients are:

- CalWIN generated correspondence,
- County related documents saved as PDF files from the workers’ computer, or
- Forms available in the DEBS Forms Library.

16.1.7 “Request Information from Client” Action

Workers may request information and/or verifications from their clients by sending a request from CalWIN to the client’s MyBCW account. To do this, the worker will open the **Maintain Case Actions** window and enter the type of action needed for the client in the **Action Type** field. Select **Request Information from Client**, set a due date, provide instructions for the client to follow, and **Save**.

Clients will have the ability to review the Informational Action and will be navigated through the steps provided in MyBCW to complete the action.

Actions submitted by clients from MyBCW will be transmitted to CalWIN and incorporated in the **Search for Received Documents** page. The worker will be able to view the generated agree/disagree document and any other uploads from the client. The worker will have the opportunity to review the material in real-time, validate the action is complete, and navigate to the Action to update the status. Also, a case comment is created for each Action from MyBCW.

16.1.8 “Signature Needed” Action

The “Signature Needed” Action allows the worker to send documents that the client needs to sign from CalWIN to the client’s MyBCW account. To view and sign the document(s) sent by the worker the client will navigate through the steps provided in MyBCW to complete this action.

When a client has completed this action, the document will be transmitted to CalWIN into the **Interface Activities Subsystem, Search for Received Documents** page. The worker will be able to view the generated agree/disagree document and any other uploads the client may have submitted. This will provide the worker the opportunity to review the material real-time, validate the action is complete, and navigate to the Action to update the status.

16.1.9 Mailing Address in MyBCW for Homeless Clients

MyBCW allows a homeless individual without a mailing address to complete and submit his/her application online.

My Benefits CalWIN will:

- Prompt the applicant to enter the Benefits Assistance Center (BAC) address as his/her mailing address.
- Auto populate the address “Homeless, CA 00000” if the applicant does not enter the mailing address, as instructed.
- Request that the applicant enter contact information, such as phone number or e-mail address.
- Inform the client to contact the Benefits Assistance Center (BAC) if no contact information is given or if they have not heard from the Agency within 24 hours of submitting an application.
- Inform the client that an appointment letter will be sent to them at the mailing address provided.



Note:

A “Social Service Mail Request/Agreement” (SCD 1483) is still required as per current policy.

[Refer to “[Homeless Mailing Address](#),” page 28-1 for more information.]

**Reminder:**

EWs must follow current No Show policy if the client fails to appear to their interview.

- [Refer to CalFresh Handbook, “Missed Initial Interview [63-301.32],” page 3-24 and CalWORKs Handbook, “Application,” page 2-1 and “Denial,” page 6-10 for more information.]

16.1.10 MyBCW Questions and Answers

This section contains commonly asked questions regarding MyBCW that are not addressed above. The intent is to provide staff with a greater awareness and preparedness of the application.

Q1: Can the client apply for benefits online if he/she does not have a social security or phone number?

A1: Yes, phone number and SSN are not mandatory fields in MyBCW. Clients can apply for all programs, including CF Expedited Services, even if they do not have a phone number or SSN.

Q2: Will the clients be able to submit verifications via MyBCW?

A2: Yes, clients who have access to a scanner may submit their verifications(e.g., rental agreement, paystub, etc.) online. Other clients can mail the verification separately after they submit their online application, SAR7 or RRR.

Q3: Can a client choose to stop receiving SAR7/RRRs in the mail now that the online option is available?

A3: No, all clients will continue to receive SAR7/RRRs in the mail as usual even though they prefer to complete the reports in MyBCW.

Q4: Will MyBCW know the SAR cycle and RRR month so that the client does not submit in the wrong month?

A4: Data is only loaded to MyBCW when the SAR7 and RRR are due. If the client whose SAR7 or RRR is not yet due, he/she will receive a message when trying to submit the information via MyBCW.

Q5: Will MyBCW allow clients to submit SAR7/RRRs online for a closed case?

A5: No, clients cannot submit a report if their case is in closed status. SAR7/RRR data are only loaded onto MyBCW for those clients with a report due.

Q6: Will the client be able to submit a duplicate SAR7/RRR?

A6: No, once a SAR7/RRR is submitted for that household, client will not be able to enter/change data on the reports submitted.

16.2 Access CalWIN

Access CalWIN (ACW) is an Interactive Voice Response (IVR) system that provides the general public and clients access to automated information via telephone. ACW allows the general public and clients to access to the following information in real-time:

- General information on programs/services provided by our agency,



Exception:

CWES and Foster Care-related programs are not accessible through the Automated InfoLine.

- Office locations and business hours,
- Up to 6 months of case information, such as monthly benefit amounts and share-of cost, RRR date and periodic report status (SAR7/MSR),
- Request for benefit verifications;
- Request for replacement Medi-Cal cards
- Contact information for other services, such as Electronic Benefits Transfer (EBT), elderly/child abuse hotlines, health care services, WIC and more;
- Frequently asked questions (FAQ),
- Connect to a live county representative for additional assistance during office hours.

16.2.1 Enhancements to IVR

For Continuing cases, the following case specific information is available after the caller enters a Social Security Number and Date of Birth for an active case member:

- Status of periodic reports
- Date and time of annual RRR
- Program status

For Intake cases, the caller is routed directly to the assigned EW.

16.2.2 Cisco Desktop Agent

With the DEBS Call Center IVR enhancement, the Cisco Agent Desktop (CAD) has been updated to display the following caller information:

- Case name and CalWIN case number
- Daytime phone Number
- Case language
- Case mailing address
- TMT Ticket number (when applicable)

16.2.3 Languages

ACW is available in English, Spanish, Cantonese, Vietnamese and Farsi.

16.2.4 Special Indicators

Clients can request that their case information be unavailable in the IVR system without having a Domestic Violence or Confidential case.

Two Special Indicators, "Prevent ACCESS/IVR Retrieval" and "Prevent Benefits CW Retrieval," are available in CalWIN to prevent the playback and display of case specific information when calling the 24-Hour Automated Infoline or when accessing MyBCW, respectively.

16.2.5 PIN Requirement

Clients will be required to enter a 4-digit Personal Identification Number (PIN) to access their case information. Their case number will also be required as a secondary identifier for all PIN set-ups and resets. Thereafter, they will be required to enter both the SSN and PIN when accessing their case information

The PIN is an additional security measure to protect client information.

Clients will have the option to transfer to Phone Support staff if they have questions regarding the PIN requirement, if they are having difficulties in setting up a PIN or if they enter their PIN incorrectly after 3 attempts. Phone Support staff must be sure to verify client's information prior to answering any case related questions. However, Phone Support staff will not be able to create, change or reset PINs. If a client needs assistance with a PIN related issue, staff should refer them to the "Automated Phone Service PIN Guide" (SCD 2318).

16.3 My Benefits CalWIN Mobile Application

My Benefits CalWIN (MyBCW) Mobile application can be download by users through their smart phones

MyBCW Mobile application provides the following benefits:

Users are able to:

- Apply for Disaster Food Assistance (when Governor/President declares area as disaster zone)
- Obtain an overview of the 4 major programs and be directed to MyBCW website to apply for:
- CalWorks
- CalFresh
- Medi-Cal
- General Assistance (can obtain an overview of the program, but cannot apply on MyBCW)
- Find the nearest Benefits office, by GPS, zip code, or selecting location from list
- Access case status
- Access EBT balance
- Access benefit amounts information for the above programs including General Assistance/General Relief (GA/GR) program.

16.4 Electronic Notifications (e-Notices)

Clients who elect to receive electronic notifications will get a notification that a correspondence is available for viewing in their secure account. E-notifications will alert clients to view county correspondence via their secure personal online account in My Benefits CalWIN. CalFresh, CalWORKs, and Medi-Cal clients may opt in or out of receiving e-notifications and receive traditional paper notices at any time. Clients have the option to receive their notifications both electronically and in hard copy.

16.4.1 Guidelines

The State provided the following guidelines:

- The household/AU must receive an initial email and paper notice that confirms the household/AU has opted to receive e-notices, the rights and responsibilities of receiving e-notices, and instructions regarding how to retrieve the e-notices.
- All e-notices must be provided through an online account on a secure website or portal (i.e. BCW).
- An email must be sent to the household/AU when a new e-notice is available on the secure website or portal.
- e-Notices must provide the same information as hard copy notices within required time-frame and include the most current NA Back 9. In addition, hard copy versions of correspondence will be available to clients upon request. All clients' state hearing rights will be preserved and Notices of State Hearing will not be sent electronically.
- When the county discovers that e-notifications can't be received by the client, the county must revert to traditional hard copy mail. E-notification will be considered undeliverable if the county receives a message that the e-notification was not deliverable or confirmation that the e-mail used does not belong to the intended person. When this happens, the county must send a mailed notification to the last known address for the client advising them that the e-mail was undeliverable, and that traditional paper notification will resume, and a hard copy of the notice that the undeliverable e-notification was pertaining to. Case comments must be entered that document when an email is returned because the email address on file is invalid.
- The client will be informed that in order to resume receiving e-notices, the client will need to complete the enrollment process again.
- All electronic correspondence must be accessible to both Federal and State Quality Control (QC) reviewers and cases must be identified as having opted to receive e-notification.

16.4.2 Client Opt-In Agreement

Clients who opt in for e-notification are required to sign the form, "Electronic Notification Agreement" (NA 1273) and the "Consent To Receive Electronic Communications From The County Of Santa Clara" (SCD 2551).

The NA 1273 must be signed in **My Benefits CalWIN**. The NA 1273 notification agreement includes the following information:

- They agree to receive all correspondence from the county via e-notification, except hearing related notices.

- Agree to read all e-notices sent to their email account and to view the documents through their secure personal online account.
- Agree to keep the county informed if their email address changes by filling out a new Electronic Notification Agreement within ten days of the changes.
- The county must give the client a paper copy of any document posted in their secure personal online account, if they ask for one.
- The county will revert to traditional paper correspondence if the e-notices could not be received by the email address provided by the household.
- They can stop getting e-notices at any time and go back to getting notices by paper correspondence.

The SCD 2251 is available online and in all Intake packets. The SCD 2551 agreement states that the client:

- Has read and understands the consent form and authorizes the County to utilize electronic communication which includes email and text messages.
- Agrees to update contact information within a reasonable and timely manner.
- Understands that in order to unsubscribe the request can be made over the phone or in writing.
- May be subject to fees from their service provider and understands that the County has no obligation to pay fees or charges.



Note:

CAPI applicants and recipients must provide their consent by completing the appropriate questions in the CAPI forms SOC 814 or SOC 804.

16.4.3 Types of Correspondence

Electronic correspondence includes the following written communication, but not limited to:

- The Notice of Missed Interview
- Notice of Denial
- Notice of Required Verifications,
- Notice of Eligibility (i.e. Notice of Approval)
- Notice of Expiration of Certification,
- Notice of Adverse Action,
- Notices of Action regarding changes to the CalWORKs grant or CalFresh benefits including discontinuances or other changes to the case, and

- Notices regarding Intentional Program Violations, claims, and disqualification.

The following notices are not sent electronically and remain in hard copy:

- Any notifications or correspondence related to a client's fair hearing will remain in hard copy, written format only.
- Any informal county contact not mandated by state or federal statute or regulation will not be sent by this secure personal online account.
- Overpayment notices, repayment agreement, and time on aid notices.
- Notices of referral to the Treasury Offset Program.



Note:

State Hearings notices may be sent electronically but must be sent via the Appeals Case Management System (ACMS) to those recipients who have an account with ACMS and have elected email as their communication preference.

All other correspondence, that is not an official program notice mandated by state or federal statute or regulations, may be sent directly to the household's email address or via text message. Informal county communications (i.e. request to schedule an appointment or request for a call back) do not need to be sent through a secure website or portal.

16.4.4 Forms

The following forms are created for e-notification:

- NA 1273 (7/13) Electronic Notification Agreement: Clients can sign the agreement only in the My Benefits CalWIN portal. CalWIN sends a signed copy of the agreement in both electronic and hard copy format.
- NA 1274 (7/13) Electronic Notification Notice: After signing the notification agreement in My BCW, CalWIN sends the client the confirmation notice (NA 1274) both by a paper correspondence and email regarding the decision to receive e-notification. The confirmation will direct the client to log-in their secure personal online account to view all correspondence.
- NA 1275 (7/13) Electronic Notification Cancellation Notice: This notice informs the client that they are being switched back to paper correspondence. This form will be generated in hard copy only.
- SCD 2382 Electronic Notification Option: This flyer must be included in the intake packet.
- SCD 2551 Consent To Receive Electronic Communications From The County Of Santa Clara: This agreement is available in all Intake packets and online in the DEBs library.

16.4.5 Process

Enrolling in E-Notifications

Households/AUs must be notified of the option to receive e-notifications at application and recertification. If a household/AU chooses to receive e-notifications, then the NA 1273 and SCD 2551 must be signed stating that they agree to receive and read the e-notifications. After the agreement has been signed, an email confirmation and a paper NA 1274 confirming the decision to receive e-notifications will be sent to the client. A confirmation email will be sent to the household/AU with instructions on how to log in to their account to view the e-notifications. EWs must document in Case Comments the households/AUs decision to receive e-notifications instead of traditional paper notices.

The following steps show the process for e-notification:

Stage	Who	Action
To opt in for e-notices		
1.	Clients	Completes the SCD 2551 and sign the e-notification agreement (NA 1273) in MyBCW.
2.	MyBCW	Sends a signed copy of the NA 1273 and the NA 1274 in both electronic and hard copy format.
3.	Clients	<ul style="list-style-type: none"> Receive an alert in their personal email account when a new notice is available for viewing in their MyBenefits CalWIN Portal account. Log into their MyBCW account and view, print, or save the e-notices.

Discontinuing E-Notifications

If it is discovered that the e-notification could not be received by the household/AU, then the household/AU is required to revert to paper notices. When this happens, the NA 1275 must be sent to the last known address advising the household/AU that email is undeliverable and that traditional paper correspondence will resume. To resume receiving e-notifications, the household/AU will have to repeat the enrollment process.

The following steps show how to discontinue e-notification when mail is undeliverable.

Stage	Who	Action
To Stop e-notices		

Stage	Who	Action
1.	Clients	<ul style="list-style-type: none"> • Cancel e-notification by updating their settings in their MyBCW Portal account, or • Contact the county to request their correspondence revert to paper, or • It is discovered that e-notifications are undeliverable.
2.	MyBCW	<p>Sends a hard copy of the NA 1275 to inform the client that he/she is being switched back to traditional paper correspondence per their request.</p> <p>Note:</p> <p>CalWIN also defaults to traditional paper option and sends a paper copy of the NA 1275 when an email delivery is failed.</p>
3.	EW	Updates the delivery option at the Collect Case Summary Detail window and documents in the Case Comments window, the client's decision to change back to paper correspondence.

16.4.6 CalWIN

Clients who opt in for e-notices must have a MyBenefits CalWIN Portal account to receive notifications in a secure manner.

Clients can only opt in for e-notices through MyBCW; however, they can opt out in MyBCW or by contacting the county.

E-notifications produced on the client's MyBCW account are printable by the client. No modification is allowed prior to printing.

E-notifications are sent by CalWIN in the overnight batch. When CalWIN receives a delivery failure notification from the clients email account, the system will default back to hard copy notifications and will send the undeliverable notice to the client by batch.

The following Client Correspondence and **Data Collection** windows are modified with new fields relating to eNOAs:

- **Collect Case Summary Detail** window-**eNOA [Y/N]** field is added,
- Search for **Printed Correspondence** window-**Email [Y/N]** and **Hardcopy [Y/N]** fields are added, and
- **View Printed Correspondence Details** window-**Email [Y/N]** and **Hardcopy [Y/N]** fields are added.

16.5 Text Messaging

16.5.1 Text Messaging Accounts

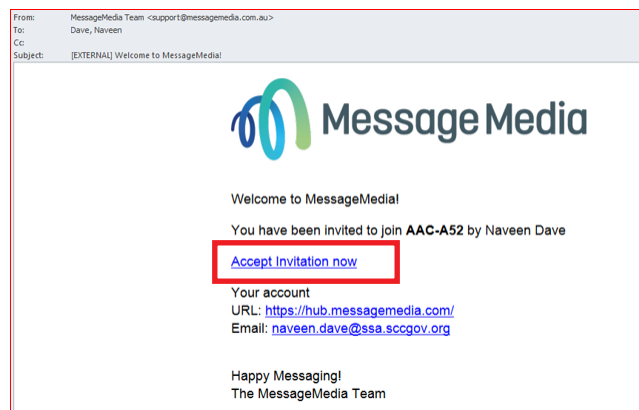
Text messaging is one of the electronic messaging methods used by the County to maintain communication with clients. MessageMedia Hub is the platform used by staff to send text messages to clients.

MessageMedia Team Communication

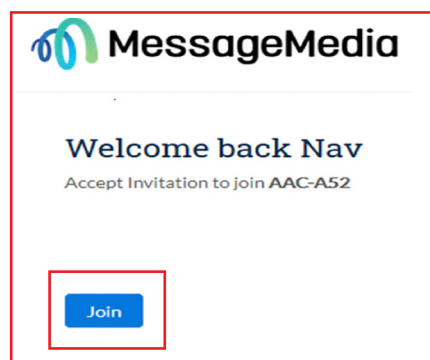
An email is sent to new users. Once an email message similar to the screen below (1.) is received, you may set up your user profile as per instructions given below.

Instructions for setting user profile:

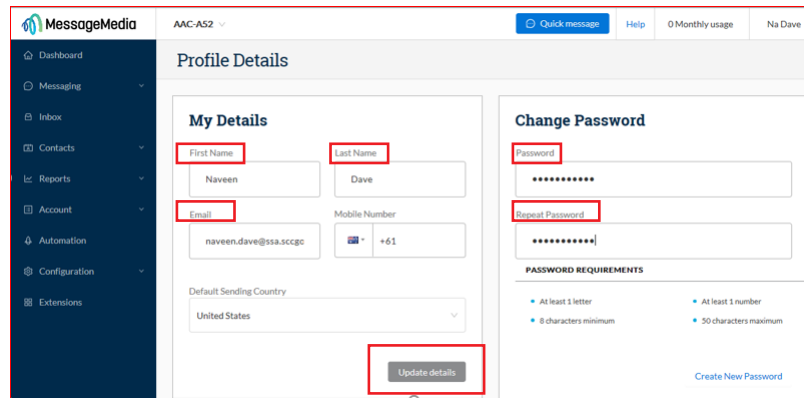
1. Click the link [Accept Invitation now](#) in the received email.



2. Click JOIN on the next screen.



3. Enter First Name, Last Name, Email, **Password**, **Repeat Password** and click the **Update Details** button.



The screenshot shows the MessageMedia Profile Details page. The page is divided into two main sections: "My Details" and "Change Password".

My Details:

- First Name: Naveen
- Last Name: Dave
- Email: naveen.dave@ssa.sccgc
- Mobile Number: +61
- Default Sending Country: United States

Change Password:

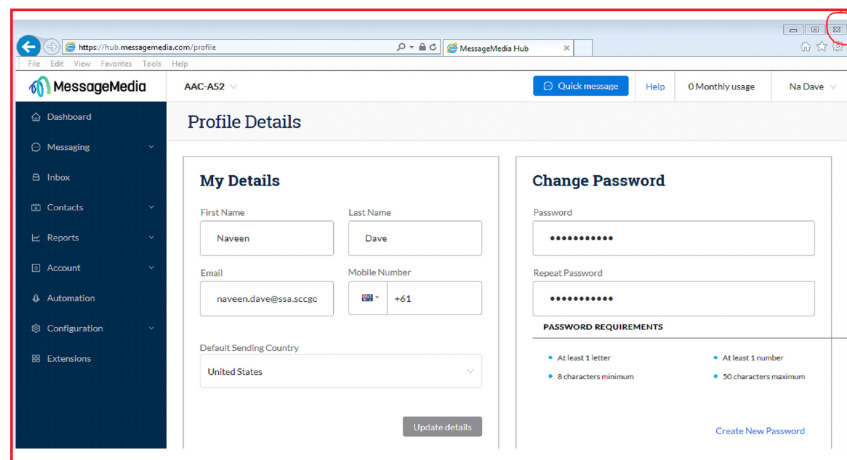
- Password: [Redacted]
- Repeat Password: [Redacted]

PASSWORD REQUIREMENTS:

- At least 1 letter
- At least 1 number
- 8 characters minimum
- 30 characters maximum

The "Update details" button is located at the bottom of the "My Details" section.

4. Close Web Browser



This completes your profile setup and you are now ready to begin sending text messages to clients.

