



## Self Service Portal Committee Update

02/23/21



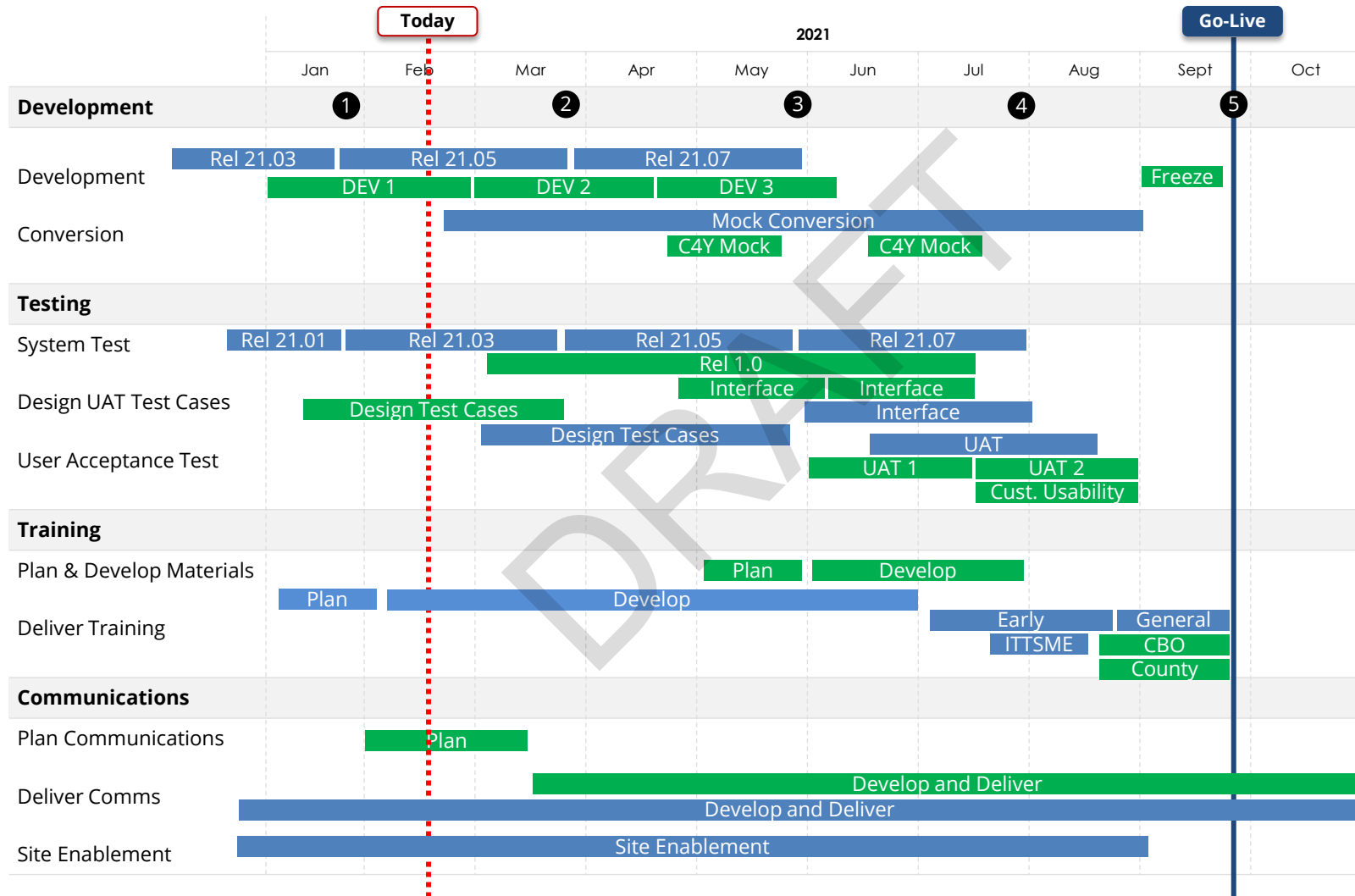
# CalSAWS Portal/Mobile

## Highlights

- **Brand:** The team assessed the current portals' search engine visibility and found opportunities for improvement. Search Engine Optimization (SEO) recommendations provided on 02/02/21 and incorporated within the development plan.
- **User Centered Design (UCD):** UCD plans are finalized for the 2021 calendar year including more than 12 cycles of usability testing and discovery sessions for Release 3.0 and Release 4.0 plans.
- **Design:** General System Design (GSD) and Technical System Design (TSD) Part II versions are submitted for review, including the CalSAWS API interface details. Deliverable comments are in progress and the Final Deliverable is on track for submission on 03/01/21.
- **Development Readiness:** Development is on-track for Increment 1. Release 1.0 (September 2021) development is organized into three increments to support early and ongoing testing.
- **Operational Readiness:** A list of 80+ readiness measures will be used to track and assess the BenefitsCal system readiness for Production Go-Live. Work product submitted 02/05/21.
- **Testing/QA:** Test case development is underway and Consortium reviews of the System Test cases are in progress. Integrated UAT planning is in progress as well, for end-to-end scenarios between BenefitsCal and CalSAWS.

# Portfolio Readiness Timeline

## BenefitsCal + C-IV Migration



### Legend

BenefitsCal

C-IV Migration

### Releases

- 1 Rel 21.01
- 2 Rel 21.03
- 3 Rel 21.05
- 4 Rel 21.07
- 5 BenefitsCal + C-IV

# Upcoming Testing Opportunities

## Updates

- CRFI will be distributed soon to request participation in the User Acceptance Testing Phase (UAT)
- We are also looking for a few participants to validate early, during the System Test Phase (SIT)

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# Real-Time Interfaces

Modernized from the current state



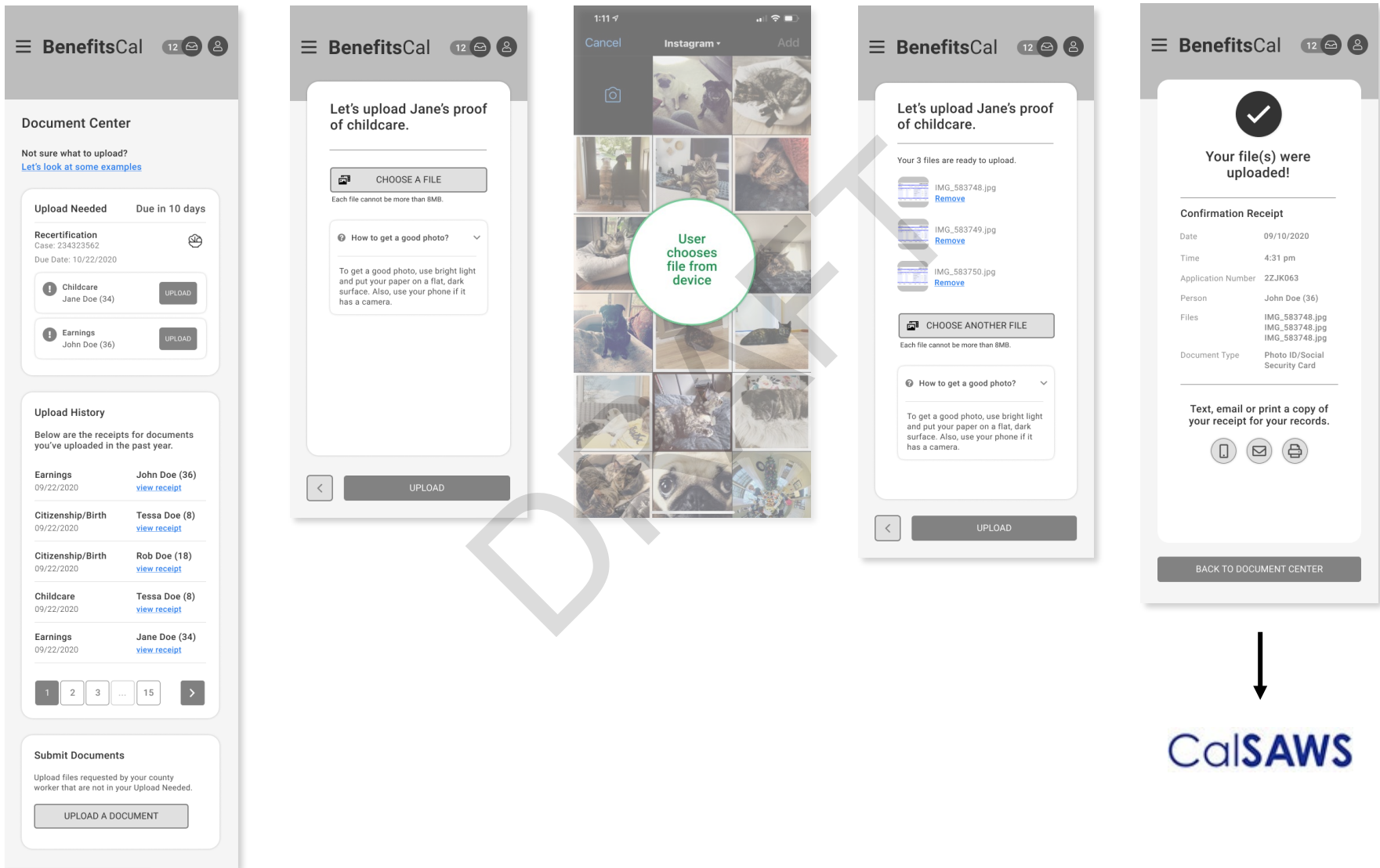
CalSAWS

## Real-Time Interfaces Between Systems

- Document Upload
- Applying for Benefits
- Redetermination
- Periodic Reports
- Checking Benefits
- Viewing Correspondence
- ...and more

# BenefitsCal Document Upload

## On Desktop and Mobile Devices



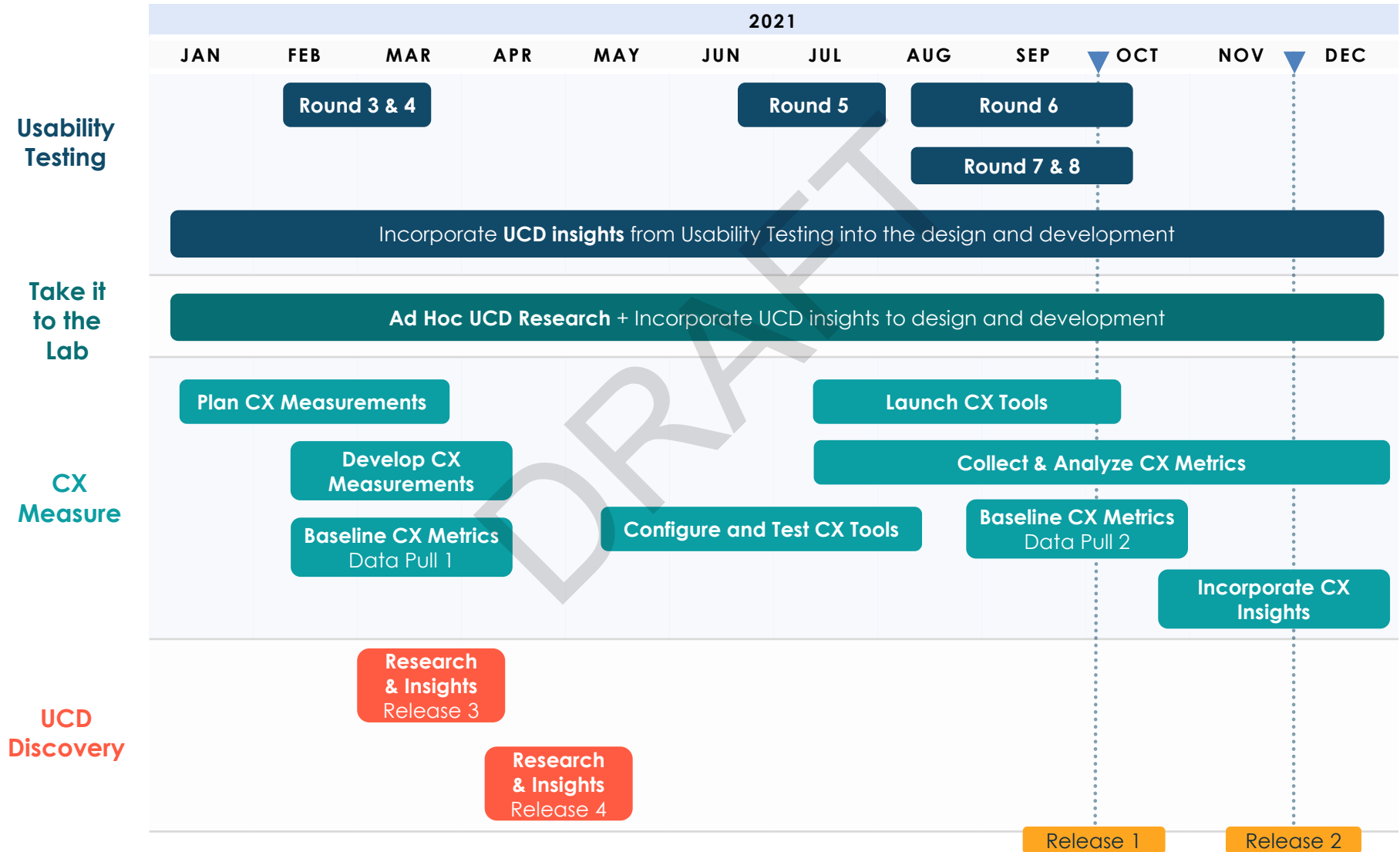
CalSAWS

# User Centered Design Plans (UCD)

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# Summary of UCD Plans for 2021

## Planning for and measuring the Customer Experience (CX)





# Search Engine Optimization (SEO) Findings and Action Plans

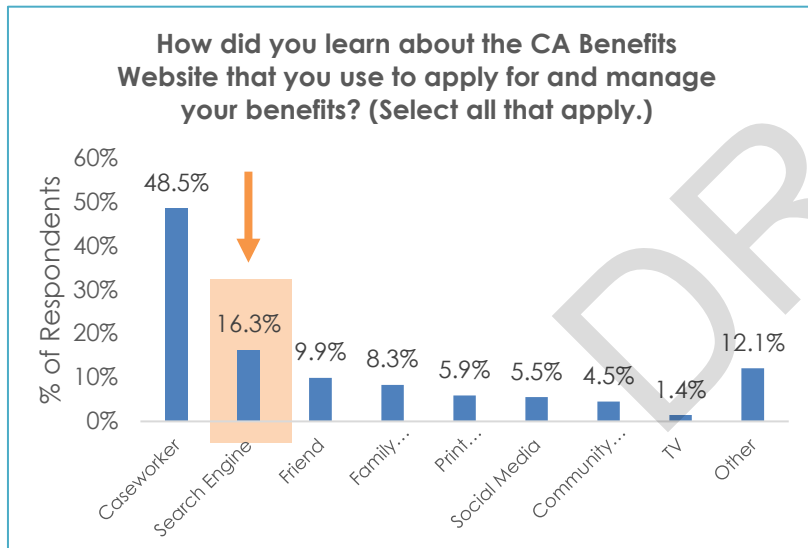
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# Research indicates there are SEO opportunities

## Customer and Data Research

1

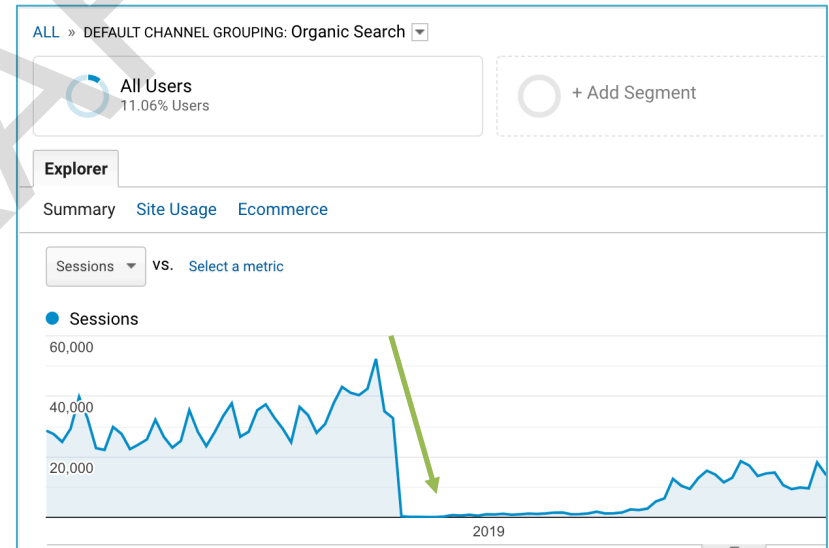
**Customer Research:** Today, customers learn about portals through Caseworkers, instead of through web searches.



Above, results from our survey of 7,000+ customers. Of those who use a CA Benefits Website to apply for benefits, the second-best way that respondents found out about the CA Benefits Website was through a Search Engine (e.g., Google). Optimizing the search engine experience for BenefitsCal is needed.

2

**Data Research:** A review of portal traffic revealed a drop in the ability to locate portals through online searches.



Above, organic traffic on a portal, with a drop in traffic from which the site never fully recovered.

# Insight: Leverage ecosystem relationships to create backlinks to the site

## Finding

High-quality, natural links to a site act like “votes” for that site’s authority to search engines (such as Google and Bing) and BenefitsCal is part of a rich network of high-quality sites from which it can request natural backlinks.

## Action Plan

Leverage ecosystem relationships to ask sites to update links from existing portal sites to the new BenefitsCal website.

This could include the following:

- Federal/State Websites
- County Websites
- Partner Websites (United Way, GetCalFresh, others)
- Other Websites (Universities, others)



Above, examples of high-authority sites that BenefitsCal has relationships with and from which we can request backlinks.

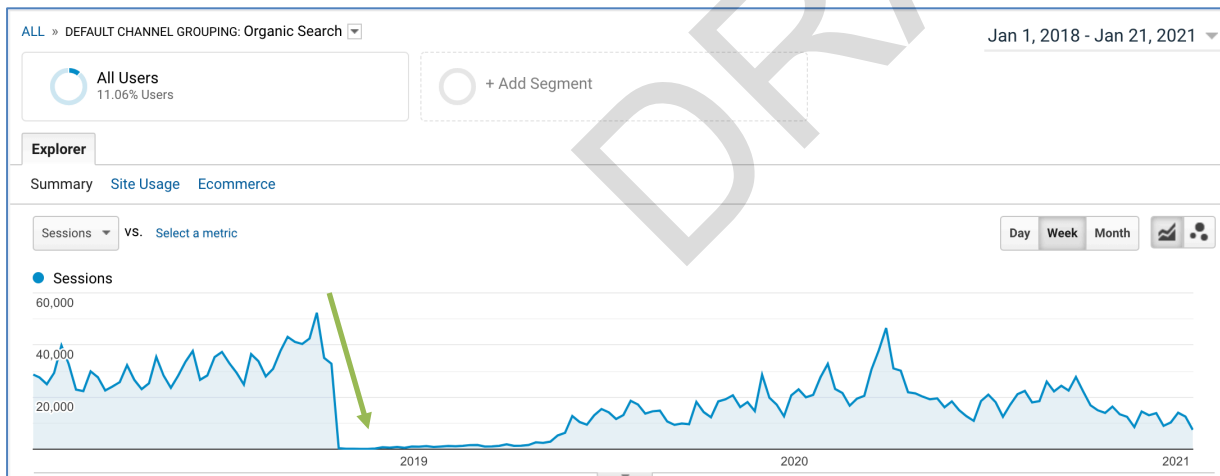
# Insight: 301 redirect from existing portals to the BenefitsCal website

## Finding

We know a complete SEO site migration is critical to site relaunches. Applying 301 redirects (redirect old URL to its new URL site) will prevent losses in search traffic.

## Action Plan

Complete SEO site migrations on all current portals when they are replaced with BenefitsCal. The project team should refer to the redirect mapping checklist for help and consider bringing in additional SEO support during migration periods. The team should also plan, as part of migration best practice, to monitor post-launch performance to flag any major issues.



Above, organic traffic on a portal with a drop in traffic mid-October 2018 from which the site continues to have lower traffic than historical performance.

# Insight: Expose new user relevant content to the search engine

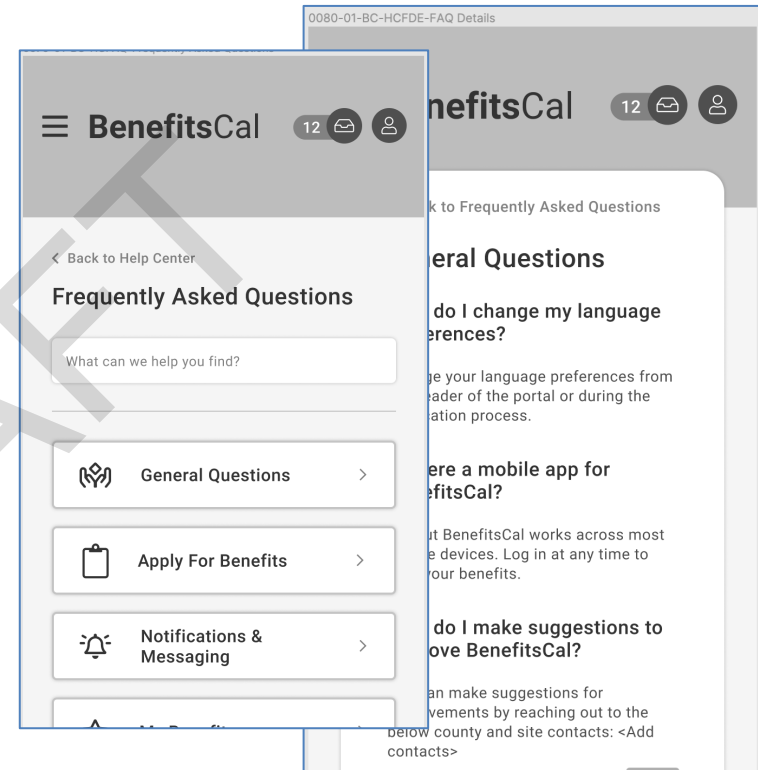
## Finding

To appear in search results, search engines (such as Google or Bing) need BenefitsCal pages to return and display. Additional content (like FAQ and Help pages) provides additional opportunities for users to find and enter the site.

## Action Plan

Expose additional content to search (for example, general questions and FAQ content), to unauthenticated users.

If there are specific topics of interest (for example, Covid-19 related service updates) consider creating new, unauthenticated content pages to compete for those specific topics.



Above, current FAQ screens within BenefitsCal.

# Insight: Help Search Engines to redirect users to BenefitsCal

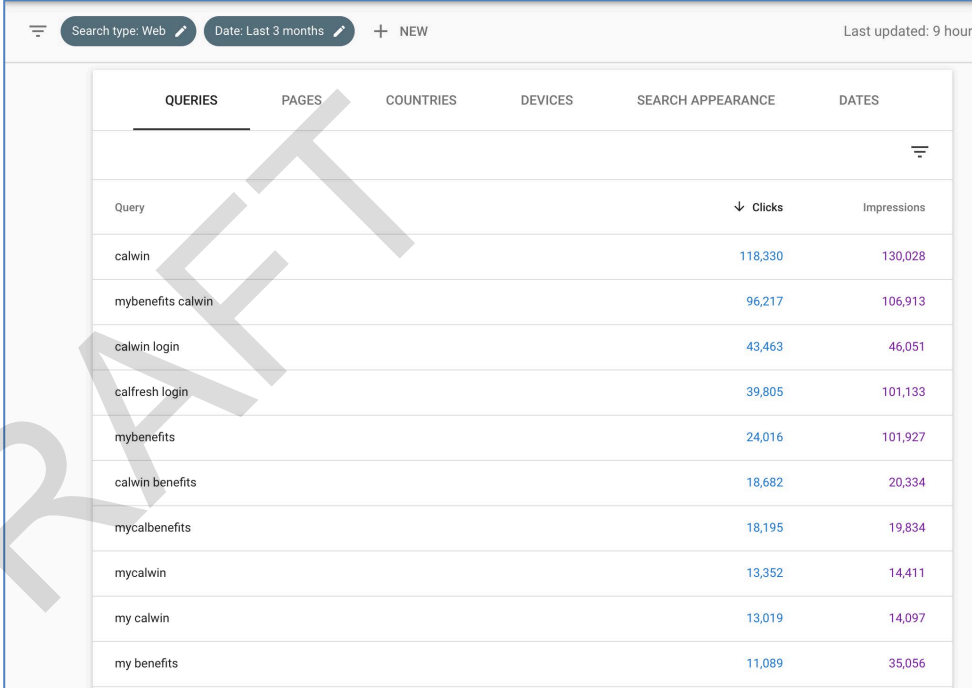
## Finding

Within the current benefit portals, a significant number of people find the portals by searching directly for portal names (referred to as high branded click volume).

## Action Plan

Weave in the existing portal names within the BenefitsCal homepage (not just within a JavaScript banner), to indicate relevancy.

This way, when users search for existing portal names (like “MyBenefits CalWIN”), the search will return and direct the user to the BenefitsCal portal.



The screenshot shows the Google Search Console interface. At the top, there are filters for 'Search type: Web', 'Date: Last 3 months', and a '+ NEW' button. On the right, it says 'Last updated: 9 hours'. Below the filters is a table with columns: QUERIES, PAGES, COUNTRIES, DEVICES, SEARCH APPEARANCE, and DATES. The 'QUERIES' column is expanded, showing a list of search queries. The 'SEARCH APPEARANCE' column is also expanded, showing 'Clicks' and 'Impressions' for each query. The queries listed are: 'calwin', 'mybenefits calwin', 'calwin login', 'calfresh login', 'mybenefits', 'calwin benefits', 'mycalbenefits', 'mycalwin', 'my calwin', and 'my benefits'. The click and impression counts are shown in blue and purple respectively.

QUERIES	PAGES	COUNTRIES	DEVICES	SEARCH APPEARANCE	DATES
Query				Clicks	Impressions
calwin				118,330	130,028
mybenefits calwin				96,217	106,913
calwin login				43,463	46,051
calfresh login				39,805	101,133
mybenefits				24,016	101,927
calwin benefits				18,682	20,334
mycalbenefits				18,195	19,834
mycalwin				13,352	14,411
my calwin				13,019	14,097
my benefits				11,089	35,056

Above, click volume to specific keywords on MyBenefits CalWIN, as recorded by Google Search Console. A majority are for brand-specific searches.

# User Conversion Plans

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# User Account Conversion

## Frequently Asked Questions (FAQ)

1

### Which user accounts will be converted?

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Accounts will be converted IF...

- The account has been accessed within the last two (2) years, AND
- The account is linked to an application or case

2

### What do users need to login to BenefitsCal?

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1. Username or Email from the current portal(s)
2. Password from the current portal(s)

No special link or code is required.

3

### What's the first-time login experience like?

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**Easy.**

- User will be prompted to enter missing information
- They'll set a new password

Please see the next slide for a preview...

More information will be shared as we approach go-live (September 2021).



# BenefitsCal Account Conversion

## First Time Login Experience

**Screen 1: Login/Registration Choice**

BenefitsCal LOG IN

Do you have a C4Yourself Account?

You can use your C4Yourself username and password to login for the first time [here](#).

**Log In**

Email (required)

Password (required)

[Forgot Your Password?](#)

LOG IN

**Create New Account**

An account lets you see your application status and easily renew your benefits.

CREATE ACCOUNT

**Community Based Organizations (CBO)**

Help people apply for benefits and check their application status.

REGISTER YOUR CBO ACCOUNT

**Screen 2: Login with existing credentials**

BenefitsCal LOG IN

User can login with their existing credentials

Log in with my C4Yourself credentials.

Username (required)

Password (required)

LOG IN

If you don't remember your username or password, create a new account

CREATE A NEW ACCOUNT

**Screen 3: Update account information**

BenefitsCal LOG IN

Missing information is requested

Let's update your account information.

First Name (required)

Last Name (required)

Email (required)

Password (required)

Must be at least

- 8 characters long
- Include a number
- Include a letter
- Include a special character (!\$%&)

Confirm Password (required)

The two passwords should match.

Mobile Phone

☐ By checking this box, I verify that this is my mobile number and consent to receive text messages via automated technology to this number regarding updates by or on behalf of BenefitsCal. Message and data rates may apply.

☐ I read, or had read to me, and I understand and agree to the [Terms and Conditions](#).

NEXT

**Screen 4: Set up security questions**

BenefitsCal LOG IN

Now, let's set up a few questions in case you forget your password.

First Security Question (required)

- Select One -

Answer (required)

Only include letters and numbers.

Second Security Question (required)

- Select One -

Answer (required)

Only include letters and numbers.

Third Security Question (required)

- Select One -

Answer (required)

Only include letters and numbers.

CREATE ACCOUNT

**Screen 5: Confirmation email**

Account registration then proceeds as usual...

A confirmation email is on its way to janedoe@gmail.com.

1. Check your inbox for our verification email
2. Click the link to verify your account

Be sure to check your spam folder if you haven't received it.

BACK TO HOME

# Training Plans

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# Training Plans: Summary of Scope

More information will be provided in **June 2021**

