

CalSAWS BenefitsCal  
(Portal/Mobile) Weekly Status  
Report

Reporting Period: May 17, 2021 to May 23, 2021

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## 1.0 Statewide Portal/Mobile Project (BenefitsCal)

### 1.1 Highlights of the Reporting Period

#### Project Management

- ▶ Submitted the Final Deliverable Expectation Document (FDED) for the Maintenance & Operations (M&O) Plan on 05/17/21.
- ▶ Submitted two (2) Final Work Products (FWP) on 05/17/21.
  - System Security Plan (SSP).
  - Customer Experience (CX) Management Plan.

#### Requirements and Design

- ▶ Met with CDSS and DHCS on Friday 05/21/21 to review the AA/AR/CBO policy research alignment. The CDSS team requested clarification of a variety of rules and requested additional time to complete their analysis.
- ▶ Conducted two (2) design sessions for Release 3.0 designs with the Consortium Workgroup on 05/19/21 and 05/20/21.
- ▶ Conducted a demonstration of the Account Management and Document Upload designs at
  - The Regional 4 Quarterly Implementation meeting on 05/18/21.
  - The Twice-monthly Implementation Checkpoint meeting on 05/19/21
- ▶ Conducted a demo of the Document Upload designs at the CalSAWS Imaging Committee meeting for May 2021 on 05/20/21.
- ▶ Addressed the comments received for the M&O Plan DDED.
- ▶ Submitted translations to the translation vendor for the BenefitsCal application on 05/21/21.

#### User Centered Design (UCD)

- ▶ Finalized recruitment for Release 4.0 discovery research, which will run from 05/20/21 through 05/25/21.
- ▶ Hosted two (2) focus groups on 05/20/21 and two (2) focus groups on 05/21/21 to learn more about County workers' and Assistants' experiences related to the Release 4.0 requirements.
- ▶ Presented a CBO monthly meeting idea to the Regional Managers (RMs) on 05/19/21. Follow-up to the meeting included sending out a response to the RMs for CBO engagement activities in their Counties.
- ▶ Submitted the CX Management Plan FWP on 05/17/21 and addressed one rejected response.
- ▶ Met with the CalSAWS and Consortium Teams on 05/18/21 to review the CX measurement baseline data pull request and address questions. C4 JIRA # 109031 and CalSAWS JIRA # 228953 were created for the requested data.
- ▶ Prepared the CX Measurement presentation materials to present to the SSP Committee on 05/25/21.

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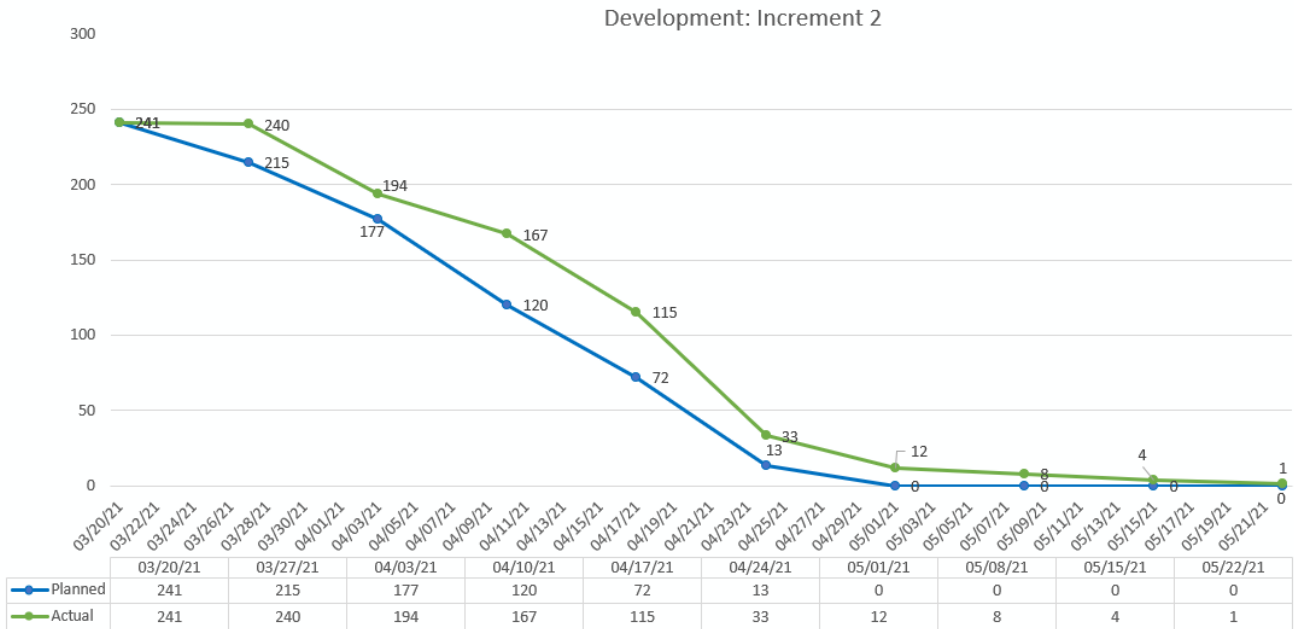
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**Figure 1.1-1 – UCD Stakeholder Engagement**

**Development**

- ▶ **For Increment 2**, developed three (3) tasks. One (1) task remaining.
  - Increment 2 development is off schedule by one (1) task.
    - Document Upload Trend Micro procurement complete for security scan based on redesign.
  - **Impact:** This did not impact the start of the subsequent System Test activities. System Test for Increment 2 began on schedule.
  - **Recovery Plan:** The team will develop the one (1) remaining task for next week.



**Figure 1.1-2 – Increment 2 Development Burndown**

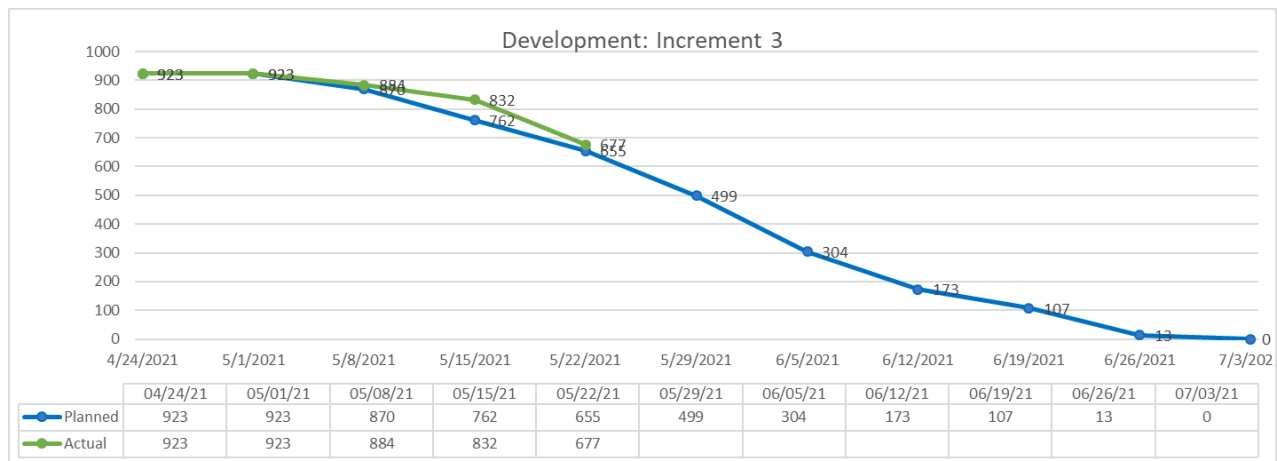
- ▶ **For Increment 3**, developed 155 tasks of the 107 total planned tasks for the week.

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- ▶ Overall, the development schedule is off by 22 tasks. This has improved from last week's report (reduced task deficit by 48 tasks from last week).
  - **Cause:**
    - Seven (7) development team members were out of office impacted by COVID last week.
    - Additional changes were required to the API delivery, where the swagger specifications provided by CalSAWS required an update to match the CalSAWS system.
    - Changes were required to Periodic Reports and Report a Change design.
  - **Impact:** This will not impact the start of the subsequent UAT activities. Iteration 3 front end components for Appointments, Dashboard and Notifications were provided to SIT on 05/24/21 as planned.
  - **Recovery Plan:** Weekend work is planned again for the upcoming weekend (05/29/21) and work is targeted to be recovered by 06/11/21.



**Figure 1.1-3 – Increment 3: Development Burndown**

### System Test Case Design

- ▶ Teams received final WAC approval of the Test Case Design Work Products on 05/14/21.

### System Test Execution

- ▶ Executed 44 of 42 planned test cases for Increment 2, Cycle 1.
- ▶ 22 of the 44 executed test cases are pending partner validation. These test cases are delayed as the team awaits resolution of defects from interfacing partners.
- ▶ 33 test cases from Increment 2 have been sent to the Consortium to review for either delay or removal. The Consortium provided direction that there is insufficient capacity to test these API exception test cases, that the UI validations should prevent the scenarios; however, the BenefitsCal team strongly recommends that these API test cases should be executed. An update will be provided next week.
- ▶ Conducted daily System Test status calls to provide updates on test execution and defects.
- ▶ Conducted a weekly test planning meeting on 05/18/21 with the Consortium and QA Teams to provide Increment 2 updates.

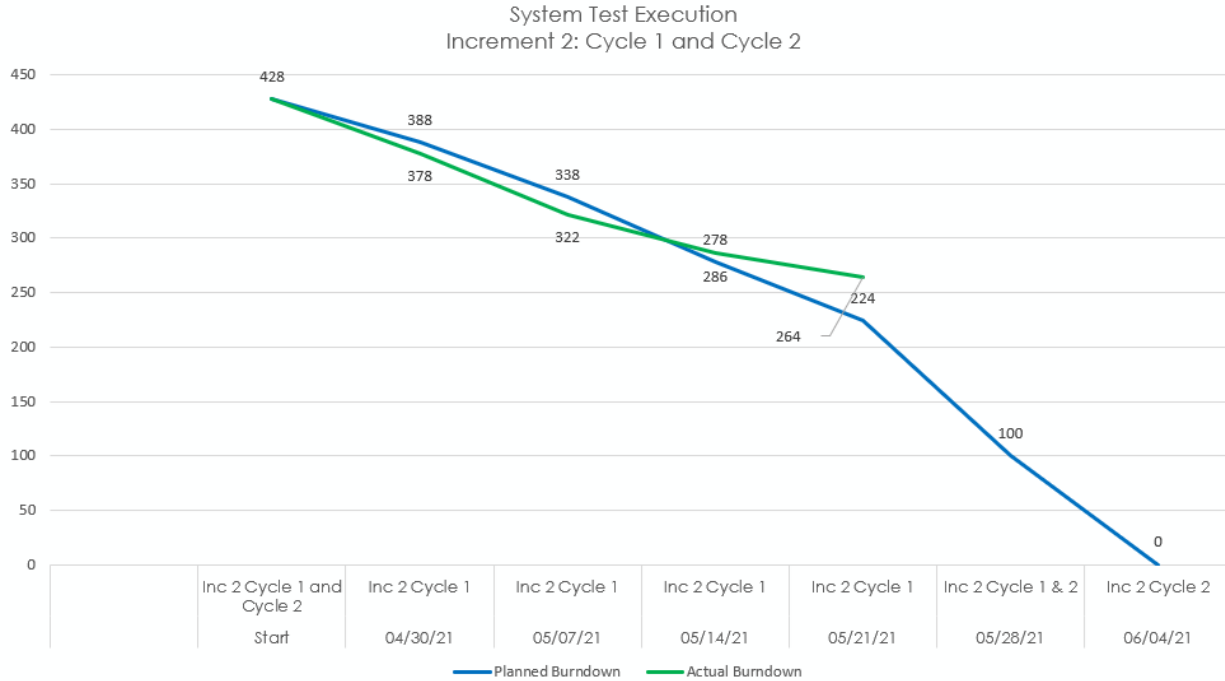
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- ▶ Conducted Partner Interface Test meetings with CalSAWS and ForgeRock on 05/19/21, 05/20/21, and 05/21/21 to walk through the ETA for partner identified defects and data set up and staging requests.

**System Test Increment 2**



**Figure 1.1-4 – System Test Execution Burndown: Increment 2**

- ▶ 16 test cases were removed this week related to the ForgeRock SDK updates: the test cases were identified as invalid (that is, the ForgeRock solution would not produce the errors and exceptions that the test cases attempted to validate). This reduced the total test cases for Increment 2 from 444 to 428 test cases.
- ▶ 33 test cases evaluate the CalSAWS API exception handling processes. There is a request from the CalSAWS team to defer the execution of these test cases to a later date. The BenefitsCal team will connect with the Consortium and CalSAWS teams to plan the execution of these test cases. The BenefitsCal team strongly recommends these test cases to plan for all possible exception scenarios before go-live.

System Test Pass Rate	All	Excl Sev-4	Test Case Execution
<b>Planned</b> (+/- from previous week)	<b>60%</b>	<b>60%</b>	<b>164 Test Cases Total</b>
<b>Actual</b> (+/- from previous week)	<b>76%</b> (+6%)	<b>76%</b> (+6%)	<b>204 Test Cases Executed</b>
System Test Complete Date: 07/16/21			

**Figure 1.1-5 –System Test Pass Rate: Increment 2**

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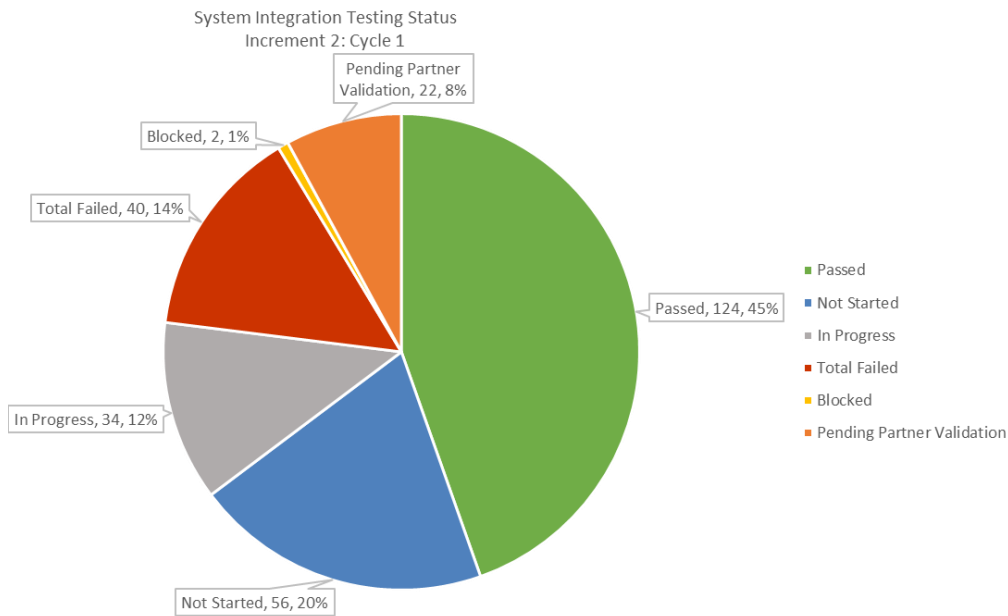
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Below is a list of the system test defects related to external interface testing:

Partner	2-Med	3-Low	4-Cosmetic	Total
ForgeRock	5	2	0	7
CalSAWS	4	4	0	8
FIS	1	0	0	1
BenefitsCal	11	12	2	25

**Figure 1.1-6 – System Test Partner Defects**

**System Test Increment 2: Cycle 1**



**Figure 1.1-7 – System Test Execution Status: Increment 2: Cycle 1**

System Test Pass Rate	All	Excl Sev-4	Test Case Execution
<b>Planned</b> (+/- from previous week)	<b>60%</b>	<b>60%</b>	<b>164 Test Cases Total</b>
<b>Actual</b> (+/- from previous week)	<b>76%</b> (+6%)	<b>76%</b> (+6%)	<b>204 Test Cases Executed</b>
System Test Complete Date: 07/16/21			

**Figure 1.1-8 – System Test Pass Rate: Increment 2: Cycle 1**

**User Acceptance Test Planning**

- ▶ Participated in User Acceptance Test (UAT) meetings on 05/17/21 and 05/19/21 to assist the Consortium. Provided updates to the integrated UAT approach and discussed the BenefitsCal UAT environment availability.

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- ▶ Assisted the Consortium UAT Team with workarounds for email ID usage and explained functionality associated with the use of emails from the application and within ForgeRock.

### Performance Test

- ▶ Completed five (5) of the nine (9) total performance test scripts covering the Apply for Benefits functionality.
- ▶ Designed the Performance test scripts for Cycle 1.
- ▶ Completed the Performance Environment smoke test: environment is ready for performance testing execution scheduled to begin on 05/24/21.

### Security: System Security Plan (SSP) and Security Scans

- ▶ Conducted a working session with the QA Team to review the comments received on the SSP and determine the resolution strategy to address them.
- ▶ Addressed the feedback received on the BenefitsCal SSP from the Consortium and the QA Team.

### Security: Testing

- ▶ Executed the weekly static application security testing of the application source code and shared the analysis of the security scan reports with the BenefitsCal Development Team for remediation.
- ▶ Identified no new security vulnerabilities during the current weekly static application security testing.

### User Conversion

- ▶ Collaborated with the ForgeRock team to load test users onto their DEV environment for BenefitsCal Team testing on 05/19/21.
- ▶ Met with the Consortium PMO Team on 05/21/21 to gather updates on the CBO conversion process. This resulted in a status update on the County responses to the frontloading request.

### Communications Strategy

- ▶ Continued development of the BenefitsCal Marketing website to incorporate the latest round of feedback from the Consortium reviewers.
- ▶ Facilitated a review session with Advocates on 05/18/21 for the Pre Go-Live communications and the Awareness Toolkit, gathered and incorporated feedback.
- ▶ Presented the Communication Strategy to Region 4 at the Quarterly Implementation touchpoint on 05/18/21.
- ▶ Met with the Riverside County CBO Outreach Leaders on 05/19/20 to understand their process for engaging with CBOs in preparation for our upcoming CBO monthly engagement meetings.
- ▶ Drafted storyboards and facilitated a kickoff on 05/17/21 for three (3) BenefitsCal videos that will be presented at the June JPA meeting.
- ▶ Submitted marketing website copy for review and received approval on 05/18/21.
- ▶ Submitted the Pre Go-Live communication materials for final review on 05/19/21 and obtained approval for distribution.
- ▶ Created a draft of a new communication, "CBO Brochure," to promote BenefitsCal adoption with the CBO community.



### Pre Go-Live Communications

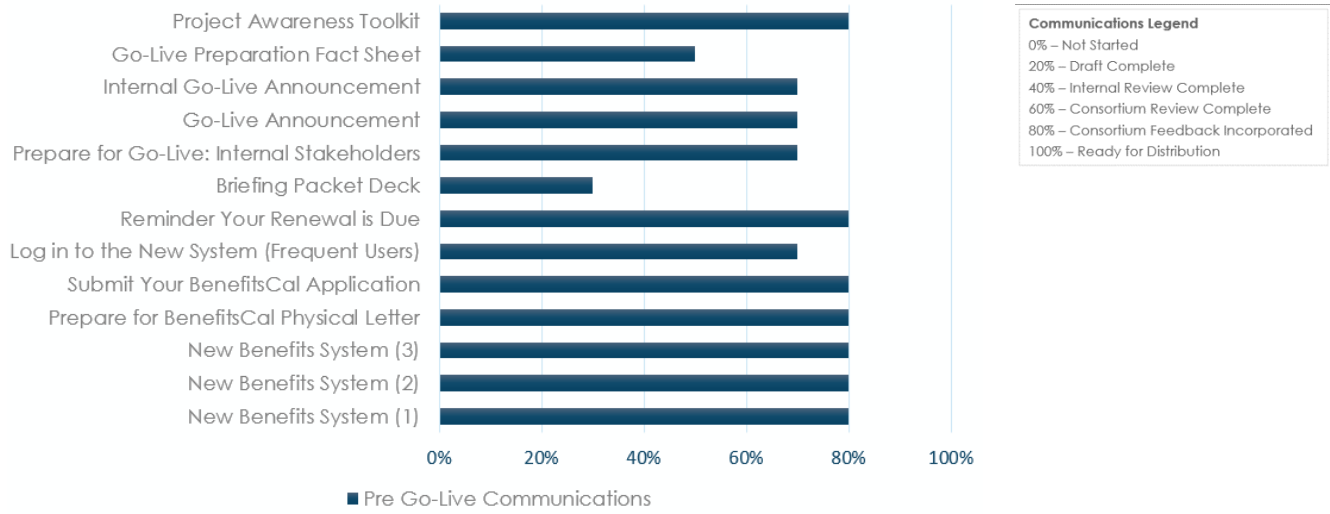


Figure 1.1-9 – Communications: Pre Go-Live

### Marketing Communications

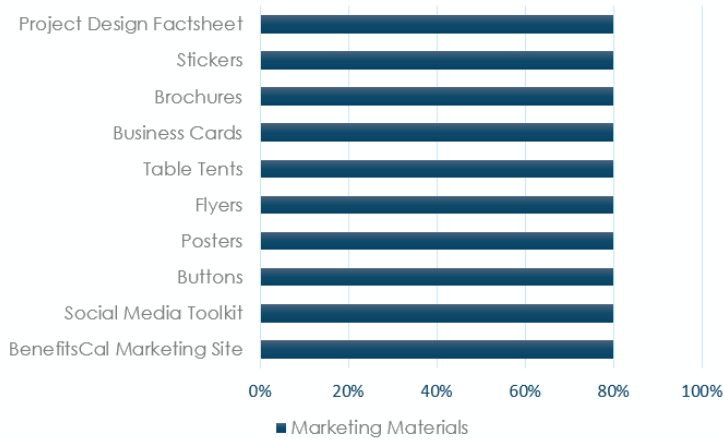


Figure 1.1-10 – Communications: Marketing

### Post Go-Live Communications



Figure 1.1-11 – Communications: Post Go-Live

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## Training

- ▶ Presented a Discovery Twice-Monthly Implementation Readiness Checkpoint on 05/19/21.
- ▶ Developed six (6) Quick Reference Guides.

Quick Reference Guides

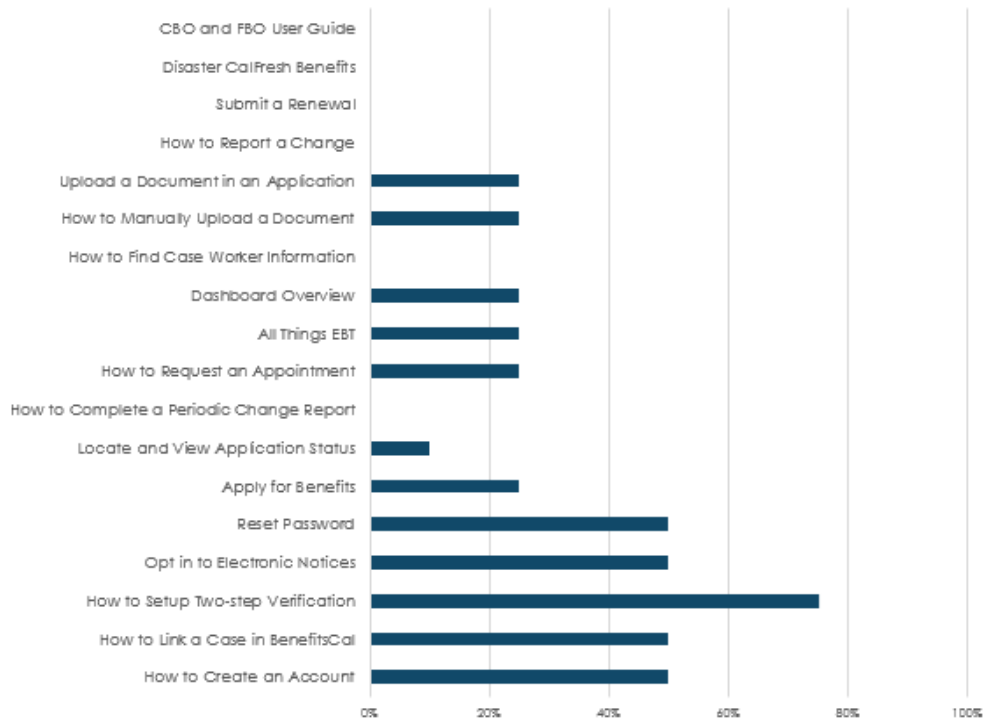


Figure 1.1-12 – Training Quick Start Guides

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## Project Timeline

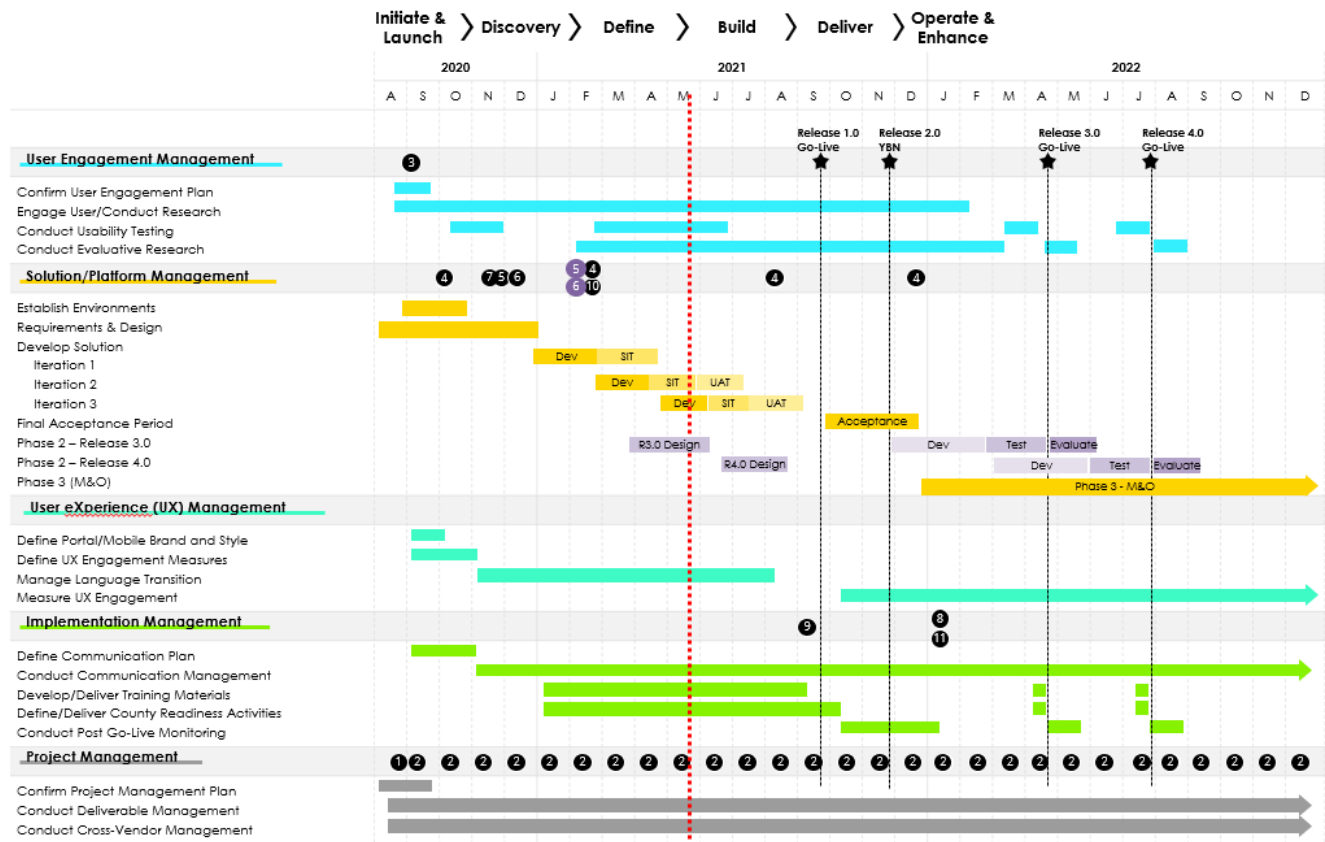


Figure 1.1-13 – Project Timeline Chart

### Project Action Items – Overdue

► This table lists overdue action items, including the owner and due date.

ID	Description	Owner	Due Date
	No overdue action item submitted during this reporting period.		

Table 1.1-1 – Overdue Action Items

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### 1.2. Project Deliverable Summary

Deliverable activity is summarized within the tables below.

#### Deliverable Status by Submission

		Complete		Coming Soon		
DEL ID	Deliverable Name	DDED	FDED	DDEL	FDEL	Final Approval
1	Work Plan Initial	08/17/20	08/25/20	08/28/20	09/10/20	09/17/20
2	Monthly Status Reports	08/19/20	08/31/20	09/04/20	09/21/20	09/28/20
3	User Centered Design (UCD) Plan	08/19/20	08/31/20	09/04/20	09/28/20	10/05/20
4	Requirements Traceability Matrix (RTM)	09/02/20	09/15/20	09/25/20	10/16/20	10/23/20
4.1	Requirements Traceability Matrix – Update 1	N/A	N/A	11/02/20	11/19/20	11/30/20
4.2	Requirements Traceability Matrix – Update 2	N/A	N/A	02/05/21	03/01/21	03/10/21
4.3	Requirements Traceability Matrix – Update 3	N/A	N/A	07/31/21	08/17/21	08/26/21
4.4	Requirements Traceability Matrix – Update 4	N/A	N/A	01/14/22	02/22/22	02/11/22
5	General Systems Design	09/18/20	10/02/20	12/01/20	12/30/20	01/11/21
5.1	General Systems Design – Part 2	N/A	N/A	02/05/21	03/01/21	03/10/21
6	Technical Systems Design	09/18/20	10/02/20	12/18/20	01/20/21	01/29/21
6.1	Technical Systems Design – Part 2	N/A	N/A	02/05/21	03/01/21	03/10/21
7	Master Test Plan	10/19/20	11/02/20	11/13/20	12/08/20	12/17/20
8	Implement. Complete Report & Final Acceptance	09/30/20	10/12/20	01/04/22	01/19/22	01/26/22
9	Maintenance & Operations (M&O) Plan	05/03/21	05/17/21	07/01/21	07/23/21	08/03/21
10	Mobile App General and Technical Systems Design	10/16/20	10/28/20	12/18/20	01/20/21	01/29/21
11	Mobile App Implementation Complete Report	09/30/20	10/12/20	01/04/22	01/26/22	02/04/22

**Table 1.2-1 – Deliverable Status for Current Reporting Period**

#### Upcoming Deliverable Deadlines

DEL #	DELIVERABLE NAME	STATUS	Next Deadline
01.09	Monthly Workplan: June 2021	On-track	06/05/21 FDEL Submission
02.09	Monthly Status Report: June 2021	On-track	06/05/21 FDEL Submission
04.03	Requirements Traceability Matrix – Update 3	On-track	07/31/21 DDEL Submission
04.04	Requirements Traceability Matrix – Update 4	On-track	01/14/22 DDEL Submission
08	Implementation Complete	On-track	01/04/22 DDEL Submission
09	Maintenance & Operations (M&O) Plan	On-track	05/17/21 FDED Submission
11	Mobile Implementation Complete	On-track	01/04/22 DDEL Submission

**Table 1.2-2 – Upcoming Deliverable Deadlines**

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### Work Product Status by Submission

		Complete		Coming Soon
ID	Work Product Name	DWP	FWP	Final Approval
12	SIT Test Case Format and Sample	01/12/21	01/25/21	02/01/21
13	Environment Management Plan	01/15/21	02/01/21	02/08/21
14	Performance Testing Strategy	01/15/21	02/01/21	02/08/21
15	System Test Cases			
15.1	Component Batch 1	01/25/21	02/08/21	05/11/21
15.2	Component Batch 2	02/01/21	02/16/21	
15.3	Component Batch 3	02/08/21	02/23/21	
15.4	GSD Part II Test Case Updates	03/15/21	03/29/21	
15.5	End to End Scenarios	03/22/21	04/06/21	
15.6	Interface Scenarios and Test Cases	04/05/21	04/19/21	
15.7	GSD Part II Test Cases (Addl. Component + E2E)	04/12/21	04/26/21	
15.8	Conversion + ADA Scenarios	04/19/21	05/03/21	
16	Operational Readiness Report	02/05/21	02/22/21	03/02/21
17	System Security Plan (SSP)	05/03/21	05/17/21	06/01/21
18	Desktop to Wireframe Mapping	02/05/21	03/01/21	03/10/21
19	High-Fidelity Visual Comps	02/05/21	03/01/21	03/10/21
20	Web Style Guide	02/05/21	03/01/21	03/10/21
21	Communications Strategy	03/26/21	04/12/21	04/21/21
22	Customer Experience Measurement Plan	05/03/21	05/17/21	06/01/21

Table 1.2-3 – Upcoming Work Product Deadlines

### 1.3. Project Risks and Issues

ID	Title	Details	Status	Impact	Severity	Date Logged
01	Portal and CalSAWS Schedule Alignment	Changes are needed to the CalSAWS Interfaces (APIs) to interface with the new BenefitsCal system (Portal/Mobile project). 02/16/21 – The risk severity was reduced to medium in alignment with the QA, Consortium, and project team assessments. 03/26/21 – The risk was expanded to include the schedule challenges with the QA test: the QA team will gain access on 05/31/21, two weeks prior to UAT, and will test in a rolling two-week schedule ahead of UAT activities.	Open	High	Medium	10/09/20
03	COVID Impacts to Staffing	As of April 2021, the COVID pandemic has increased rapidly within India, thereby impacting India's team members' ability to deliver due to unplanned and sudden unavailability due to illness or the need for family support.	Open	Med	Med	04/28/21

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### 1.4. CRFI/CIT Communications Information

The following table outlines CalSAWS Information Transmittals (CITs) sent for the reporting period.

CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
		No CITs submitted during the reporting period.				

**Table 1.4-1 – CITs**

The following table outlines CalSAWS Requests for Information (CRFIs) sent for the reporting period.

CRFI ID	To	Subject	Distribution Date	Status	Response Due Date
		No CRFIs submitted during the reporting period.			

**Table 1.4-2 – CRFIs**

### 1.5. Activities for the Next Reporting Period

#### Requirements and Design

- ▶ Continue development of the BenefitsCal Marketing website.
- ▶ Update the General System Design (GSD) with the Recertification for CalFresh Benefits (CF37) designs.
- ▶ Research Co-Browsing solution options.
- ▶ Facilitate four (4) demos at the Regions 1, 2, 3, and 5 Quarterly Implementation Regional Touchpoints on 05/25/21, 05/26/21, and 05/27/21.
- ▶ Facilitate a demo during the SSP meeting on 05/25/21.
- ▶ Create the Interview Nudge design specifications.

#### User Centered Design

- ▶ Host two (2) focus groups on 05/24/21 and one (1) focus group on 05/21/21 to learn more about the user experience as it relates to the Release 4.0 requirements.
- ▶ Facilitate a UCD Monthly meeting with the Advocate community on 05/27/21.
- ▶ Work through CBO recruiting activities for go-live from the following sources:
  - CDSS CalFresh referral partners (via Alexis Fernandez)
  - GCF referral partners (via Alexis Fernandez)
  - DHCS Medi-Cal Assisters (via Tannis Carlson)
  - C4Y Counties (via Jen Hobbs and Nichole Nava)

#### Development

- ▶ Increment 3 – develop the planned widgets for the week of 05/29/21 and clear backlog (estimated to complete on 06/11/21).
- ▶ Review Static Application Security Testing (SAST) and Dynamic Application Security Testing (DAST) issues for resolution.

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### System Test Execution

- ▶ Conduct daily System Test status calls to provide updates on test execution and defects.
- ▶ Conduct a Test Planning meeting on 05/24/21 to provide Increment 2 test execution updates and present the ADA, Cross-Device, and Cross-Browser Plan.

### User Acceptance Test Planning

- ▶ Continue to support the Consortium to define the integrated UAT approach and define tasks and timelines on 05/24/21 and 05/26/21.

### Performance Test

- ▶ Execute Cycle 1 Performance testing on 05/24/21 through 06/04/21.
- ▶ Perform connectivity testing with partners on 05/25/21.
- ▶ Complete load generator setup and monitoring setup prior to 05/26/21.
- ▶ Complete monitoring setup prior to 05/26/21.

### Security: Account Conversion

- ▶ Transform the CBO user data provided by the Counties into the template for the ForgeRock load after the determination of the approach to manage the CBO hierarchy in ForgeRock and BenefitsCal.

### Security: SSP and Security Scans

- ▶ Address any additional feedback received on the BenefitsCal SSP from the Consortium and the QA Teams.

### Security Testing

- ▶ After the validation of the identified vulnerabilities, advise on the remediation activities to be performed by the BenefitsCal Development Team. Log defects in JIRA for tracking purposes. (Weekly recurring activity).

### Communications Strategy

- ▶ Submit the Awareness Toolkit and Social Media Toolkit for final approval 05/26/21.
- ▶ Submit the Pre Go-Live communications, the Awareness Toolkit, and the Social Media toolkit to Humble for language translations on 05/24/21.
- ▶ Submit the CBO Brochure on 05/27/21.
- ▶ Present the Communication Strategy at the Region 1, 2, 3, and 5 Quarterly Implementation touchpoints.
- ▶ Meet with the Merced County liaisons to collaborate for the CBO monthly engagement meeting on 05/27/21.

### Training

- ▶ Review the quick reference guide outlines with the functional teams for verification.
- ▶ Attend the Self-Service Portal meeting on 05/25/21.
- ▶ Participate in the Region 1, 2, 3, and 5 CalSAWS Quarterly Implementation Regional touchpoints.

## 1.6. Deviations from Plan/Adjustments

- ▶ No deviations from the plan are noted.