CalSAWS BenefitsCal (Portal/Mobile) Weekly Status Report

Reporting Period: June 14, 2021 to June 20, 2021

06/23/21

Table of Contents

1.0   Project Management 3

    1.1   Highlights of the Reporting Period 3

    1.2   Activities for the Next Reporting Period 3

2.0   Application Development and Test...3

    2.1   Requirements and Design 3

        2.1.1   Highlights of the Reporting Period – Requirements and Design 3

        2.1.2   Activities for the Next Reporting Period – Requirements and Design 3

    2.2   User Centered Design (UCD) 4

        2.2.1   Highlights of the Reporting Period – UCD 4

        2.2.2   Activities for the Next Reporting Period – UCD 4

    2.3   Development...4

        2.3.1   Highlights of the Reporting Period – Development...4

        2.3.2   Activities for the Next Reporting Period – Development 6

    2.4   System Test Execution 6

        2.4.1   Highlights of the Reporting Period – System Test Execution 6

        2.4.2   Activities for the Next Reporting Period – System Test Execution 9

    2.5   User Acceptance Test (UAT) Planning..9

        2.5.1   Highlights of the Reporting Period – User Acceptance Test Planning 9

        2.5.2   Activities for the Next Reporting Period – User Acceptance Test Planning 9

3.0   Performance Test 10

    3.1   Highlights of the Reporting Period – Performance Test 10

    3.2   Activities for the Next Reporting Period – Performance Test..............................10

4.0   Security 10

    4.1   Account Conversion...10

        4.1.1   Highlights of the Reporting Period – Account Conversion 10

        4.1.2   Activities for the Next Reporting Period – Account Conversion 10

    4.2   Security Testing 10

        4.2.1   Highlights of the Reporting Period – Security Testing 10

        4.2.2   Activities for the Next Reporting Period – Security Testing............................11

5.0   Communications 11

    5.1   Highlights of the Reporting Period...11

    5.2   Activities for the Next Reporting Period 11

6.0   Training...12

    6.1   Highlights of the Reporting Period 12

    6.2   Activities for the Next Reporting Period 12

1.0   Project Management

1.1   Highlights of the Reporting Period

► Received final approval for the following Deliverables:
   o   Monthly Status Report – May 2021.
   o   Monthly Work Plan Updates – May 2021.

1.2   Activities for the Next Reporting Period

► Present the Weekly Status Report on 06/23/21.

2.0   Application Development and Test

2.1   Requirements and Design

2.1.1   Highlights of the Reporting Period – Requirements and Design

► Met with the CalSAWS Section Directors on 06/17/21 to greenlight the go-live of the BenefitsCal Marketing website. Holding on deployment to resolve a security task and pending the Domain Name set up.
► Reviewed the Quick Reference Guides (QRGs) Training materials for functional accuracy and shared feedback.
► Triaged the Independent Testing defects logged by the QA team.
► Met with the Consortium and the County Workgroup to present an updated Semi-Annual Report (SAR 7) flow on 06/16/21 and comments are expected back by Monday EOD (06/21/21).
► Met with the Consortium, CalSAWS, and Call Center representatives on the re-branding of the Chat and Call Me interfaces and sent assets to CalSAWS to update on 06/18/21.

2.1.2   Activities for the Next Reporting Period – Requirements and Design

► Continue to monitor and support the QA team's Independent Testing.
► Continue to monitor and support User Acceptance Testing (UAT) activities.
► Draft the Maintenance & Operations (M&O) Plan DDEL.
► Schedule a meeting with LA County to review the Interview Nudge General System Design (GSD) specifications.
► Meet on 06/21/21 with Consortium and County workers to review the new Recertification for CalFresh Benefits (CF37) flow.
► Revise the Periodic Reports General System Design (GSD) Deliverables based on feedback from the Consortium to align with the CF37 design.
► Revise the Periodic Reports GSD Deliverables based on feedback from the Consortium to align with the SAR7 design.
► Conduct a demonstration of the Income, Expenses, Assets, and Review and Submit modules during the Self Service Portal Committee meeting on 06/22/21.
► Conduct a demonstration of Chatbot to the CalSAWS Section Directors on 06/25/21.

2.2   User Centered Design (UCD)

2.2.1   Highlights of the Reporting Period – UCD

► Submitted a draft recruitment email template and survey to the Advocate co-leads for feedback. The feedback received was incorporated into finalized materials.
► Submitted a draft agenda to the California Department of Social Services (CDSS) for the Community Based Organization (CBO) User Transition meeting scheduled for 07/07/21 and received approval of the approach.
► Drafted the meeting materials for a UCD monthly meeting scheduled for 06/28/21.
► Collaborated with the Design team to conduct a demonstration of Loop11 for the Consortium Leads and Advocates on 06/18/21.
► Drafted Customer Experience (CX) Measurement materials for a CalSAWS Section Directors meeting scheduled for 06/23/21.
► Updated and modified CX survey materials based on subject matter expert (SME) feedback.
► Provided responses to requests for BenefitsCal updates from the Advocate community at the Quarterly Stakeholder meeting on 06/17/21.
► Met with the MyBCW data team on 06/17/21 to address questions related to the CX Measurement baseline data pull.
► Met with GetCalFresh team on 06/16/21 to learn about their experience engaging CBOs.

2.2.2   Activities for the Next Reporting Period – UCD

► Meet with the California Higher Education Basic Needs Alliance (CHEBNA) group on 06/21/21 to prepare for the transition to BenefitsCal.
► Present the CX Measurement survey designs to CalSAWS Section Directors on 06/23/21.
► Finalize the materials for the UCD monthly meeting scheduled for 06/28/21.
► Draft the recruitment emails and develop a usability testing schedule to begin customer outreach on 07/06/21.

2.3   Development

2.3.1   Highlights of the Reporting Period – Development

► **For Release 1.0 – Increment 3:** Delivered Release 1.0 Part 2 to System Test and completed 59 tasks plus the 65 backlog tasks from the previous week.
► **For Release 1.1:** Completed 14 development tasks.
► **For Release 1.2:** Completed two (2) development tasks.
► Overall, the development schedule is off by nine (9) tasks.
  o **Cause:**
    ▪ Two (2) development team members were out of office impacted by COVID last week.
    ▪ Dependency on CalSAWS/Accenture API to close integration. CBO Reports – 3; Help – 2; Survey – 2; Account Sync API – 1; Email/Text API – 1.
  o **Impact:** There is no expected impact to the start of the subsequent UAT activities for UAT Code Drops 1 or 2.
► **Recovery Plan:** Integration tasks are targeted to be recovered by 07/03/21 depending on Partner defect closure.
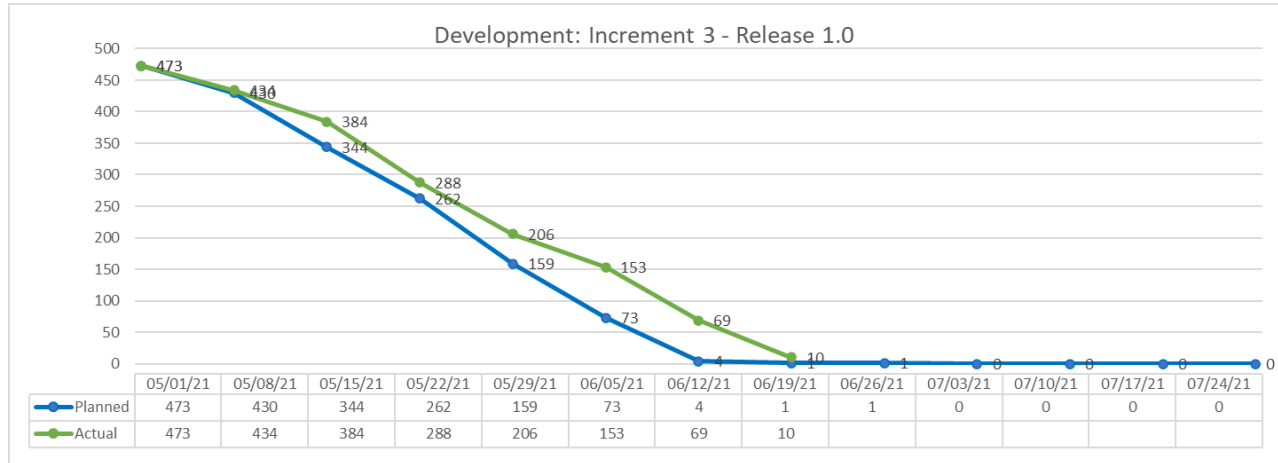
Figure 2.3-1 – Development: Release 1.0 – Increment 3

	05/01/21	05/08/21	05/15/21	05/22/21	05/29/21	06/05/21	06/12/21	06/19/21	06/26/21	07/03/21	07/10/21	07/17/21	07/24/21
Planned	473	430	344	262	159	73	4	1	1	0	0	0	0
Actual	473	434	384	288	206	153	69	10					
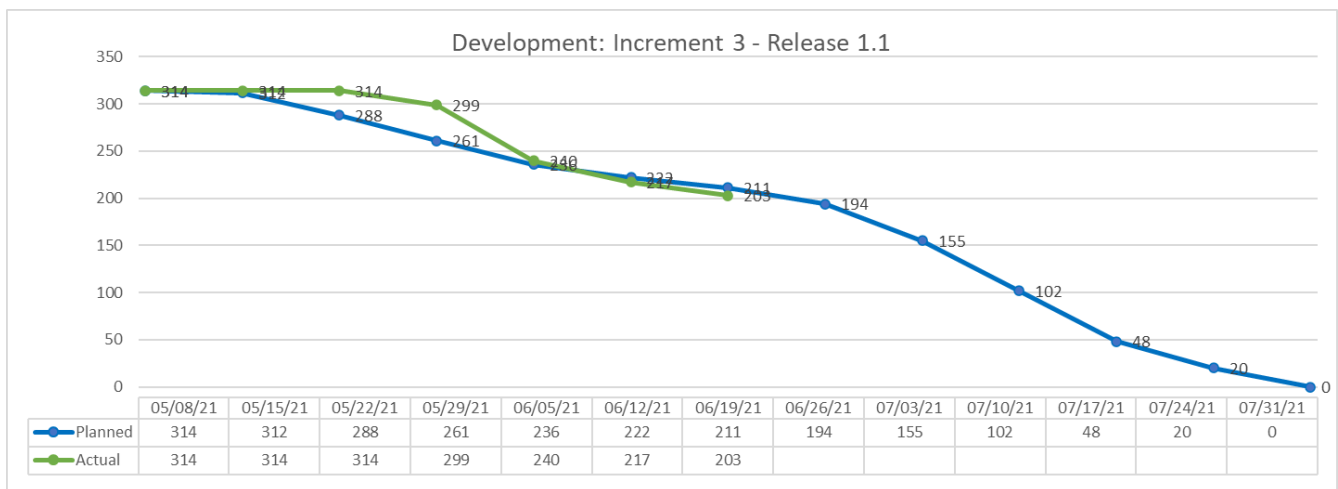
Figure 2.3-2 – Development: Release 1.1

	05/08/21	05/15/21	05/22/21	05/29/21	06/05/21	06/12/21	06/19/21	06/26/21	07/03/21	07/10/21	07/17/21	07/24/21	07/31/21
Planned	314	312	288	261	236	222	211	194	155	102	48	20	0
Actual	314	314	314	299	240	217	203						

► Change on number of tasks from the previous week: For Medi-Cal Redetermination, additional tasks were added for Assets after discussion with the Functional team – this was not a design change – but change in interpretation.
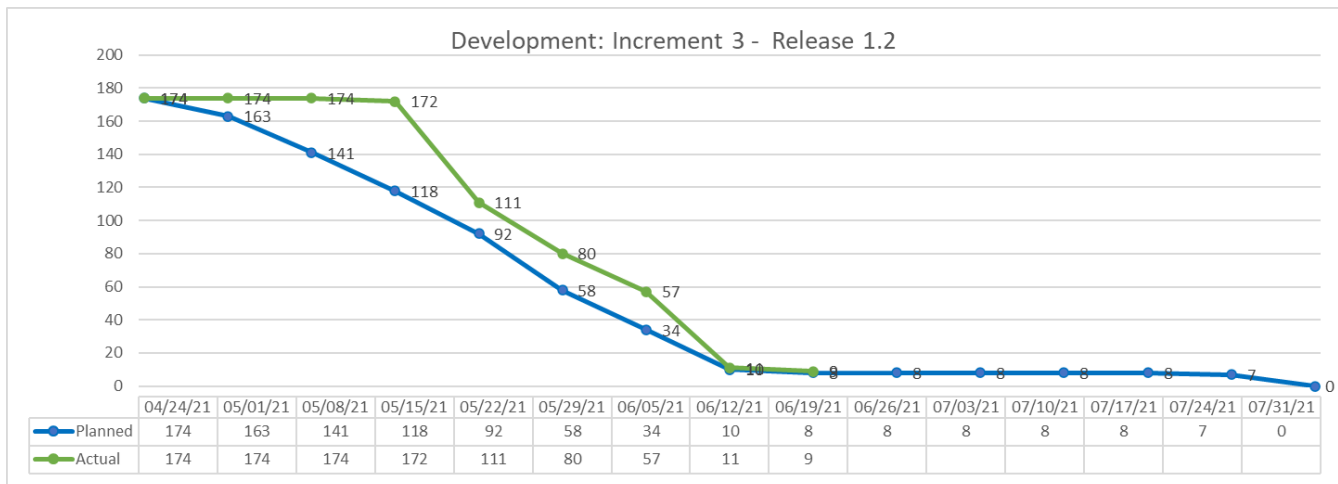

	04/24/21	05/01/21	05/08/21	05/15/21	05/22/21	05/29/21	06/05/21	06/12/21	06/19/21	06/26/21	07/03/21	07/10/21	07/17/21	07/24/21	07/31/21
Planned	174	163	141	118	92	58	34	10	8	8	8	8	8	7	0
Actual	174	174	174	172	111	80	57	11	9						

Figure 2.3-3 – Development: Release 1.2

► Change on number of tasks from the previous week: Moved five (5) tasks for Data Purge job from Release 1.0 to Release 1.2.

2.3.2   Activities for the Next Reporting Period – Development

► **For Release 1.0 – Increment 3:** Develop the nine (9) backlog tasks.
► **For Release 1.1:** Develop the 19 planned tasks for the week.
► Conduct performance optimization, provide Static Application Security Testing (SAST)/ Dynamic Application Security Testing (DAST) support, multi-lingual updates, and perform accessibility checks for Release 1.0.
► Continue to provide UAT support for Iteration 2.
► Provide System Test support for Iteration 3.

2.4   System Test Execution

2.4.1   Highlights of the Reporting Period – System Test Execution

► Executed 71 of the 70 planned test cases for Increment 3, Cycle 1.
   o Executed 114 of the 114 planned ADA test cases.
   o Executed 149 of the 149 planned cross-browser test cases.
► Conducted daily System Test status calls to provide updates on test execution and defects.
► Conducted daily Partner Test status calls to provide updates on the pending partner items and defects.
► Conducted the weekly test planning meeting on 06/15/21 with the Consortium and QA teams to provide Increment 2 and 3 execution and automation updates.
► Conducted Partner Interface Test meetings with CalSAWS and ForgeRock on 06/16/21, 06/17/21, and 06/18/21 to walk through the ETA for identified partner defects and data setup and staging requests.
► Participated in Independent Testing status meetings on 06/15/21 and 06/17/21 with the QA teams to provide support on test execution and to receive updates.
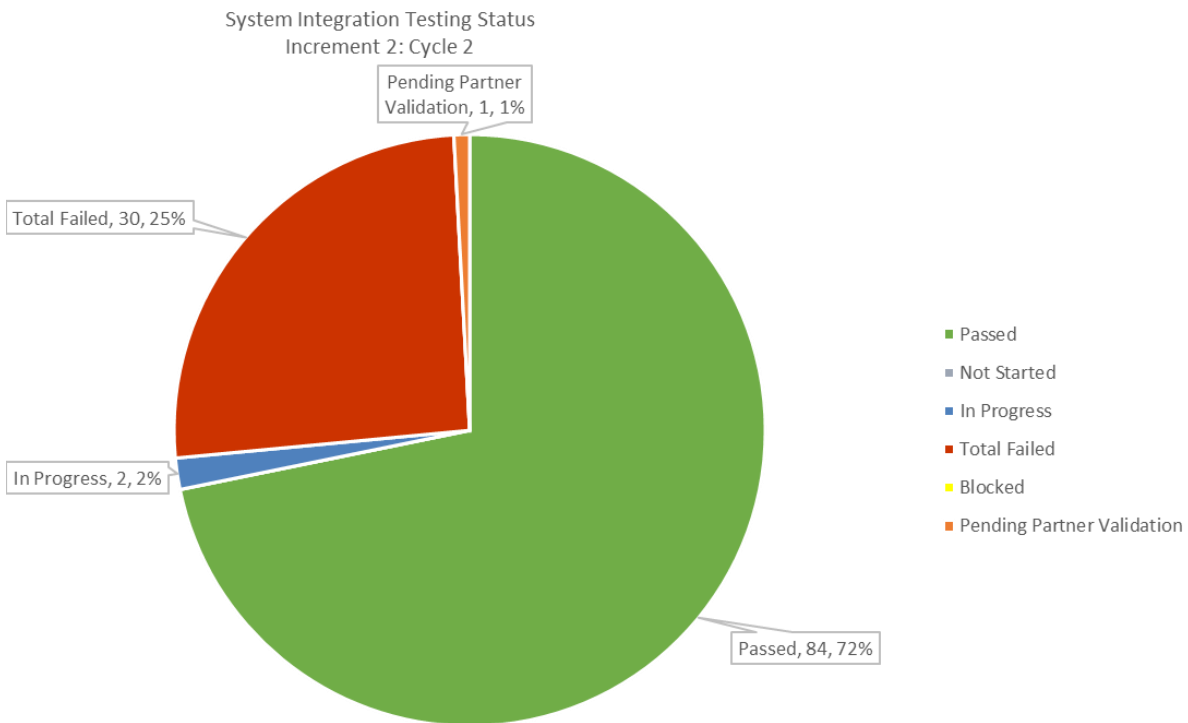
System Test: Increment 2: Cycle 2

System Integration Testing Status
Increment 2: Cycle 2

Pending Partner
Validation, 1, 1%

Total Failed, 30, 25%

In Progress, 2, 2%

Passed, 84, 72%

- Passed
- Not Started
- In Progress
- Total Failed
- Blocked
- Pending Partner Validation

Figure 2.4-1 – System Test Execution Status: Increment 2: Cycle 2

System Test Pass Rate	All	Excl Sev-4	Test Case Execution
Planned (+/- from previous week)	90%	90%	117 Test Cases
Actual (+/- from previous week)	70%	70%	115 Test Cases Executed
System Test Complete Date: 07/16/21			

Figure 2.4-2 – System Test Pass Rate: Increment 2: Cycle 2
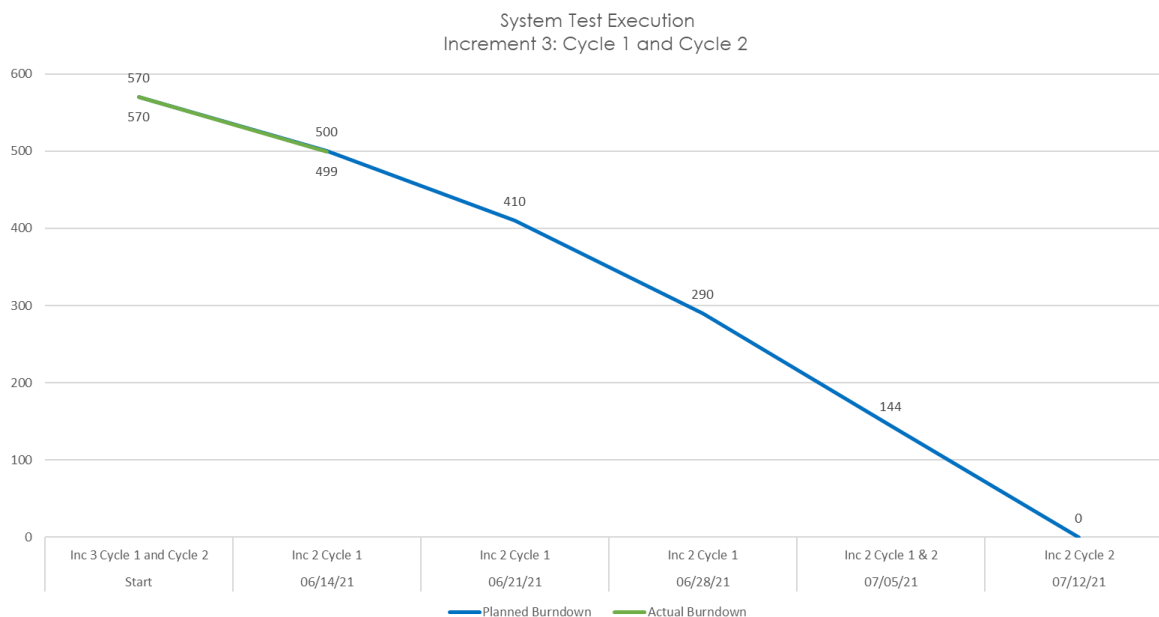
System Test: Increment 3

Figure 2.4-3 – System Test Execution Burndown: Increment 3 – Release 1.0

► Release 1.0: Increment 3 – contains 386 unique test cases. 184 test cases are scheduled for cycle 2 for regression and retest.

System Test Pass Rate	All	Excl Sev-4	Test Case Execution
Planned (+/- from previous week)	**60%**	**60%**	**70 Test Cases**
Actual (+/- from previous week)	**62%**	**62%**	**71 Test Cases Executed**
System Test Complete Date: 07/16/21			

Figure 2.4-4 – Pass Rate: Increment 3

Partner	1-High	2-Med	3-Low	4-Cosmetic	Total
ForgeRock	0	3	3	1	**7**
CalSAWS	0	3	3	0	**6**
FIS	0	1	0	0	**1**
BenefitsCal	0	1	0	0	**1**

Figure 2.4-5 – System Test Partner Defects

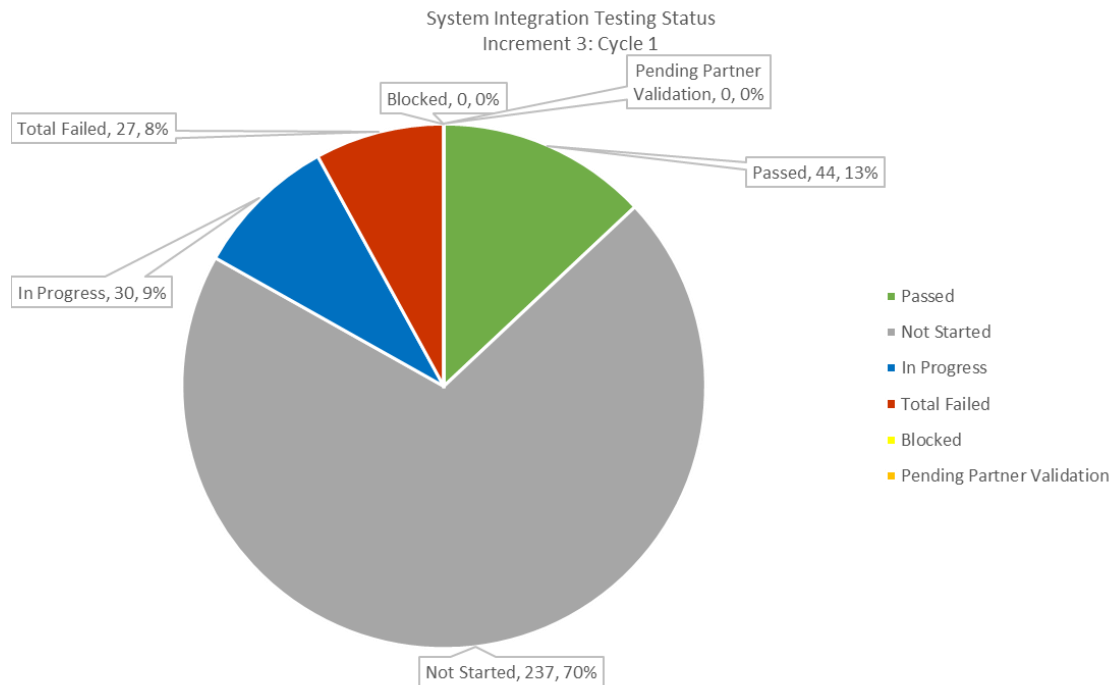**System Test Increment 3: Cycle 1**

Figure 2.4-6 – System Test Execution Status: Increment 3: Cycle 1

2.4.2   Activities for the Next Reporting Period – System Test Execution

► **Increment 2: Cycle 2** – Continue System Test execution for Increment 2, Cycle 2 – re-execution of 10 failed test cases planned.
► **Increment 3: Cycle 1** – Continue with the System Test execution for Increment 3, Cycle 1 – execution of 90 new test cases planned.
► Conduct a Test Planning meeting on 06/22/21 to provide updates on automation and Increment 2 and 3 test execution.
► Conduct daily and weekly test status calls to provide updates on test execution and defects.
► Continue to support Independent test and UAT execution.

2.5   User Acceptance Test (UAT) Planning

2.5.1   Highlights of the Reporting Period – User Acceptance Test Planning

► Participated in User UAT daily tester meetings to provide the Consortium with BenefitsCal Functional support in UAT.
► Participated in a UAT JIRA update meeting to help the Consortium set up JIRA dashboards, test cycles, and test plans and upload test cases in JIRA to begin reporting on 06/21/21.

2.5.2   Activities for the Next Reporting Period – User Acceptance Test Planning

► Conduct daily Independent touchpoint calls to triage issues and work through the testing issues.
► Continue to assist the Consortium with UAT activities.

► Continue automation execution of the ADA, cross-browser, and cross-device test cases – 200 screens planned.

3.0 Performance Test

3.1 Highlights of the Reporting Period – Performance Test

► Resolved a scripting issue for the Account Login script.
► Created the initial performance dashboards in Amazon CloudWatch.

3.2 Activities for the Next Reporting Period – Performance Test

► Create Cycle 2 Performance Testing scripts.
► Continue developing the performance monitoring and reporting dashboard enhancements.
► Address performance issues identified during the execution of Cycle 1 regarding the Lambda services release database connections.
► Meet with the CalSAWS Performance Team to begin planning Cycle 2 Performance Testing execution.

4.0 Security

4.1 Account Conversion

4.1.1 Highlights of the Reporting Period – Account Conversion

► Connected with the ForgeRock team on 06/15/21 to review the root cause of the failed user conversion test run for legacy Customer users from C4Y. Received an update on the re-run of the load on 06/19/21 and 06/20/21. The ForgeRock team to confirm the retest results on 06/21/21.

4.1.2 Activities for the Next Reporting Period – Account Conversion

► Adjust any user conversion activities when the ForgeRock team confirms the retest results on 06/21/21.

4.2 Security Testing

4.2.1 Highlights of the Reporting Period – Security Testing

► Provided a walkthrough of BenefitsCal Marketing website security testing results with the Consortium on 06/16/21.
► Executed the SAST of the application source code and shared the analysis of the security scan reports with the BenefitsCal Development Team for remediation.
► Met with the ForgeRock and BenefitsCal teams on 06/15/21 and 06/17/21 to discuss a solution to performance testing script issues. This resulted in the team determining which parameters to use when conducting the performance tests.
► Met with the ForgeRock, BenefitsCal, Business, and Security teams on 06/17/21 to determine user lockout and password reset capabilities. This resulted in an action item by the ForgeRock team to determine the feasibility of updating the conditions preventing password reset during a user lockout.

► Met with the ForgeRock team on 06/16/21 to discuss defects CSPM-16999 and CSPM-18376 regarding Denial of service attacks and OTP issues. This resulted in an additional meeting that occurred on 06/17/21 that led to an action item by the Security team to check on Denial of service feasibility with an AWS resource for AWS Advanced Shield and another action item by the ForgeRock team to analyze the ability to process OTP requests after user registration is complete and to provide their analysis.

4.2.2   Activities for the Next Reporting Period – Security Testing

► After the validation of the identified vulnerabilities, advise on the remediation activities needed. Log defects in JIRA for tracking purposes (weekly recurring activity).
► Execute DAST activities for the BenefitsCal functionalities that are ready for testing.
► Draft the security sections of the BenefitsCal M&O Plan DDEL.

5.0   Communications

5.1   Highlights of the Reporting Period

► Acquired access to the CalSAWS AWS Pinpoint on 06/17/21 to distribute customer and CBO communications. Gained approval on 06/17/21 for increased send quota from AWS Pinpoint for 3,000,000 emails.
► Completed a test email communication on AWS Pinpoint on 06/18/21.
► Gained approval on 06/17/21 for the first Twitter and Facebook social media posts.
► Met with Code for America about CBO onboarding and outreach which resulted in the sharing of materials and processes and the identification of CBOs to contact to learn more.

5.2   Activities for the Next Reporting Period

► Complete the setup of the domain name for the BenefitsCal Marketing website and deploy by 06/23/21.
► Draft a new Marketing Website page on 06/23/21 targeted at the CBO community.
► Draft a CBO brochure by 06/25/21 to support recruiting efforts.
► Submit Go-Live communications on 06/23/21.
► Provide the Sprinklr Analysis report to the Consortium on 06/25/21.
► Complete the three (3) videos for the June JPA meeting scheduled for 06/24/21.

Communications Legend
0% – Not Started
20% – Draft Complete
40% – Internal Review Complete
60% – Consortium Review Complete
80% – Consortium Feedback Incorporated
100% – Ready for Distribution

Marketing Communications

Marketing Materials	
Project Design Factsheet	100%
Stickers	100%
Brochures	100%
Business Cards	100%
Table Tents	100%
Flyers	100%
Posters	100%
Buttons	100%
Social Media Toolkit	100%
BenefitsCal Marketing Site	90%
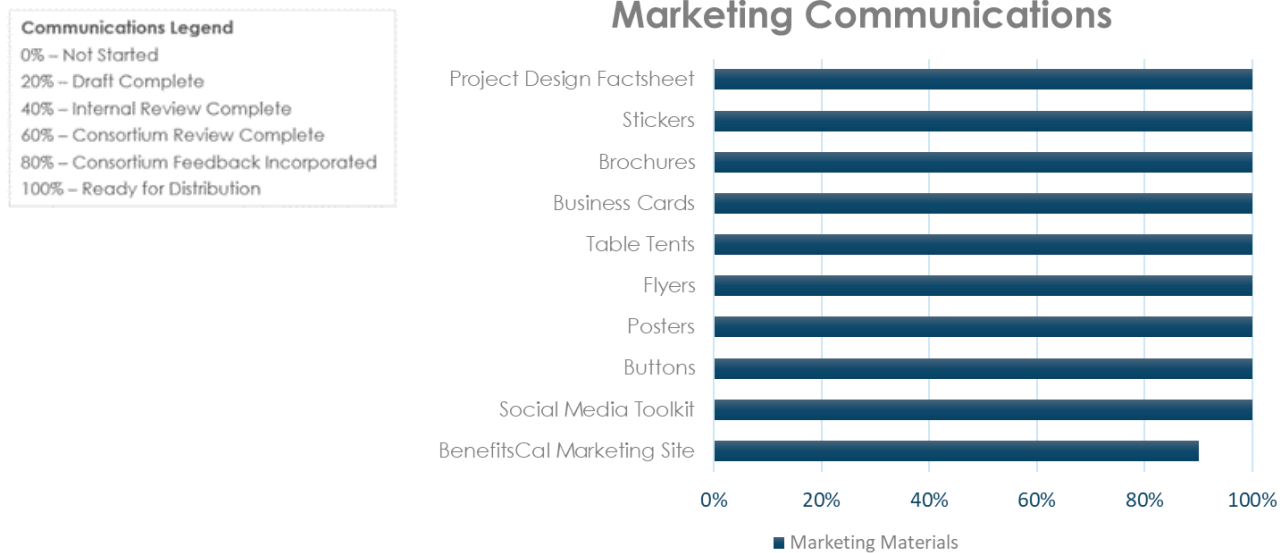
Figure 5.2-1 – Communications: Marketing

Post Go-Live Communications

Post Go-Live Communications	
Go-Live Preparation Fact Sheet	70%
Internal Go-Live Announcement	70%
Go-Live Announcement	70%
Prepare for Go-Live: Internal Stakeholders	70%
Log in to the New System (Frequent Users)	70%
Quick Start Guide	20%
Customer Post Go-Live Survey	20%
Staff Post Go-Live Survey	20%
Internal Post Go-Live Results Email	20%
Internal Post Go-Live Briefing Results Deck	20%

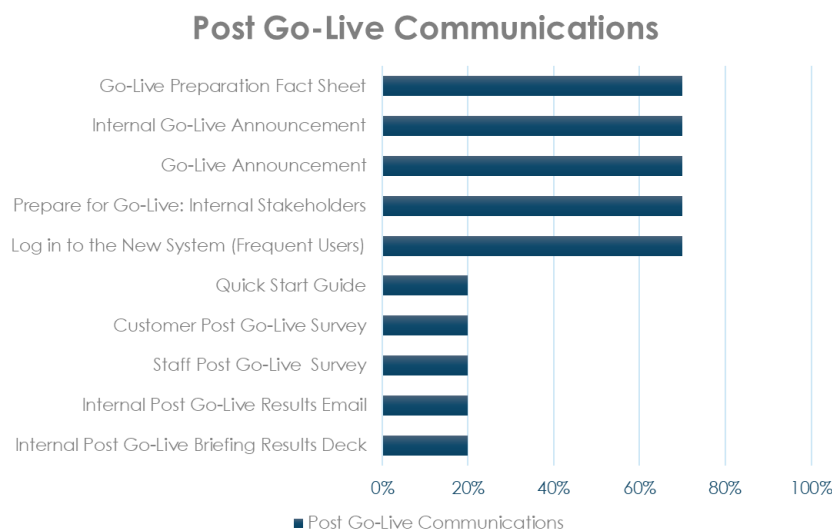**Figure 5.2-2 – Communications: Post Go-Live**

6.0 Training

6.1 Highlights of the Reporting Period

► Facilitated a BenefitsCal Training touchpoint meeting on 06/15/21.
► Presented a training update and QRG sample at the Twice Monthly Implementation Readiness checkpoint meeting on 06/16/21.
► Created outlines for two (2) QRGs on 06/16/21 and shared with the functional team for review.

6.2 Activities for the Next Reporting Period

► Finalize the BenefitsCal Overview video.
► Begin BenefitsCal training videos.

Quick Reference Guides
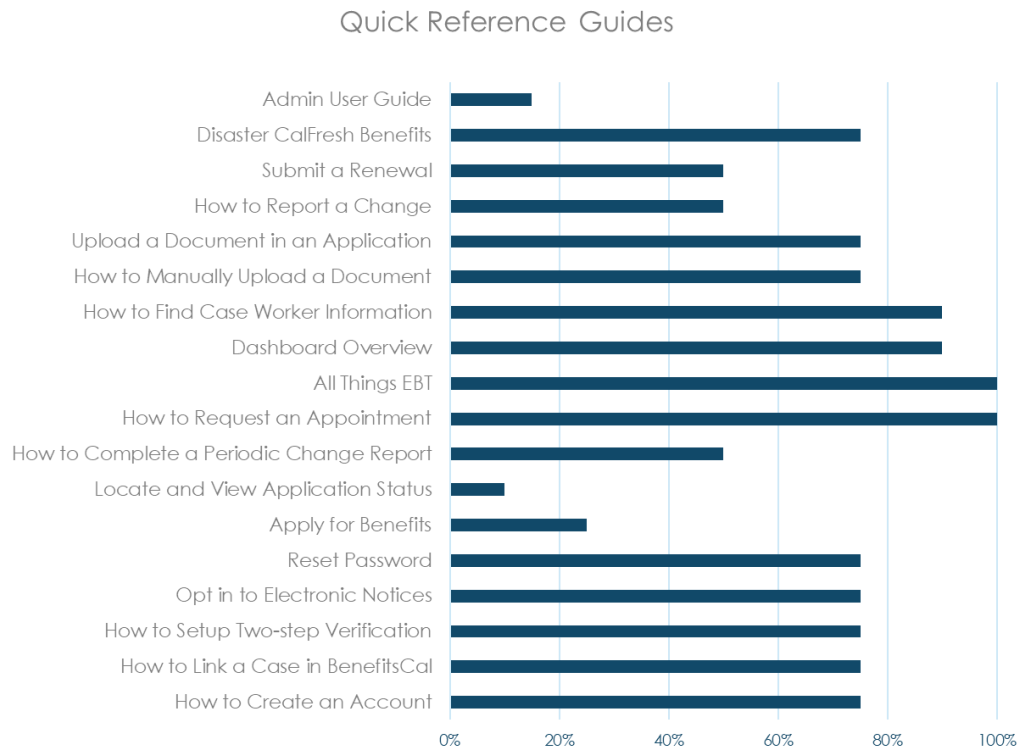
Figure 6.2-1 – Training Quick Start Guides

7.0 Appendices

► Appendix A – Deliverable Summary

		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 7.0-1 – Deliverable Status for Current Reporting Period

Upcoming Deliverable Deadlines

DEL #	DELIVERABLE NAME	STATUS	Next Deadline
01.10	Monthly Workplan: July 2021	On-track	07/08/21 FDEL Submission
02.10-	Monthly Status Report: July 2021	On-track	07/08/21 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 Report	On-track	01/04/22 DDEL Submission
11	Mobile Implementation Complete Report	On-track	01/04/22 DDEL Submission

Table 7.0-2 – Upcoming Deliverable Deadlines

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	
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	05/11/21
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 7.0-3 – Upcoming Work Product Deadlines

► Appendix B – Risks and Issues Summary

Project Risks and Issues

ID	Title	Details	Status	Impact	Severity	Date Logged
01	Portal and CalSAWS	Changes are needed to the CalSAWS Interfaces (APIs) to interface with the new	Open	High	Medium	10/09/20

	Schedule Alignment	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.					
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	Medium	Medium	04/28/21
04	Perceived Gap in Functionality	Perceived gap in functionality with GetCalFresh may impact adoption and migration schedule of BenefitsCal (Risk 246)	Open	Medium	Medium	05/10/21
05	BenefitsCal changes identified after 06/14/21 may not be addressed	Changes to BenefitsCal requested after 06/14/21 may not be addressed, given the schedule and timeline remaining. These changes can be considered for prioritization for a future release. (Risk 247)	Open	Medium	Medium	06/11/21

CRFI/CIT/CalSAWS CR 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 7.0-4 – 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 7.0-5 – CRFIs

The following table outlines CalSAWS Chang Request sent for the reporting period.

CR ID	To	Subject	Date Created	Status	Date Needed by
CA-228953 and CIV-109031		Collect data (data pull 1, 2019/2020) from various sources	05/20/21	Open	08/13/21

Table 7.0-6 – CalSAWS CR

► Appendix C – Project Work Plan Reports

Project Timeline
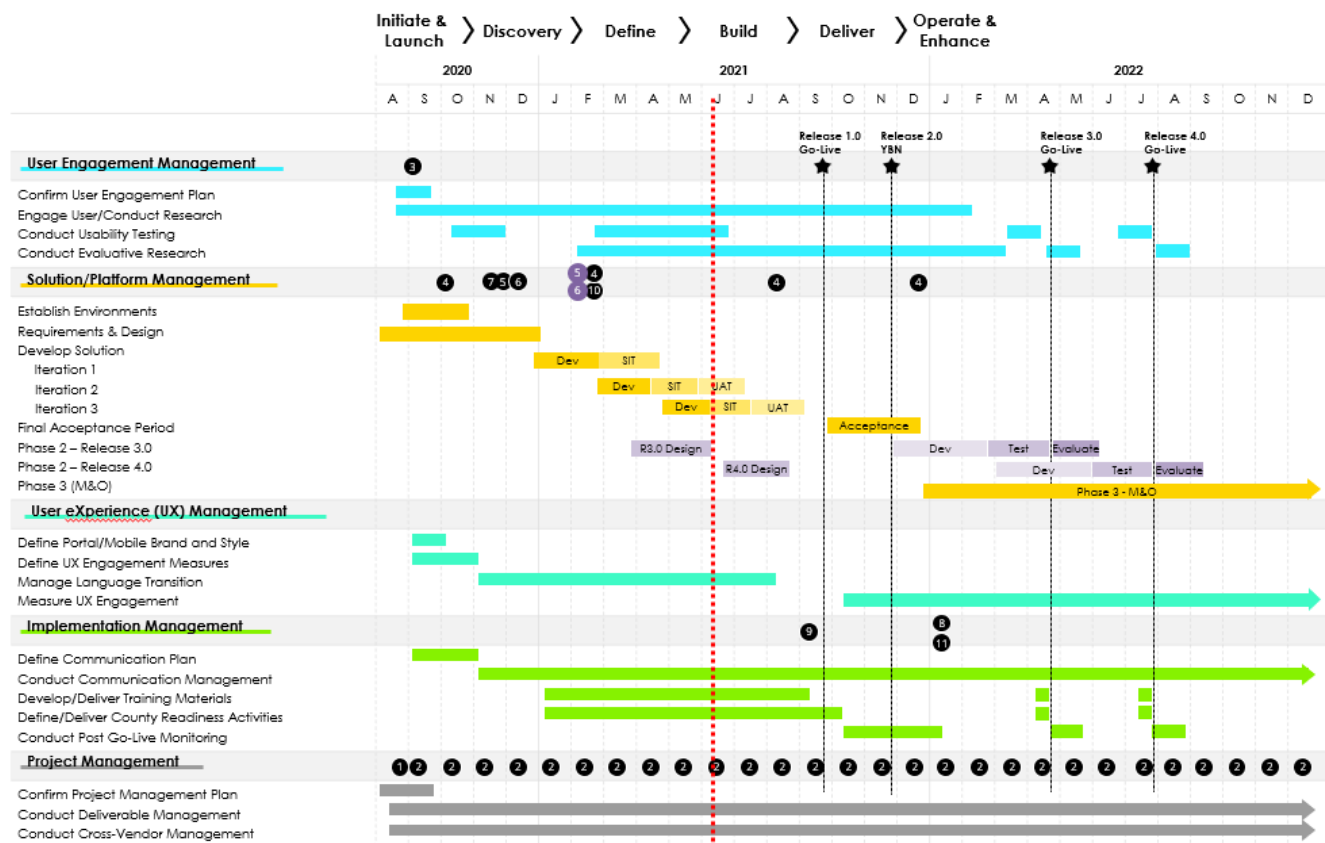
Project Action Items – Overdue

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

ID	Description	Owner	Due Date
CSPM -16564	Policy Clarifications Excel File Share	Cecilia Rolon	06/16/21

	- Pending homeless assistance responses		
CSPM – 16561	Potential Updates to Welfare-to-Work Forms - Waiting for WTW program response	Cecilia Rolon	06/16/21

Table 7.0-7 – Overdue Action Items