CalSAWS BenefitsCal (Portal/Mobile) Weekly Status Report

Reporting Period: June 12, 2023 to June 18, 2023

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
June Enhancements	Release 23.06 are on track for deployment to Production on 06/22/23 as per the plan: ➢ **Release 23.06.22:** Nineteen (19) Enhancements will be deployed to Production on 06/22/23.

CalWIN ISS Support	**Wave 3**
	➢ Health metrics generation and M&O service management support are in-progress.
	Wave 4
	➢ BenefitsCal Email (3) and SMS (2) campaign launch preparations are in progress.
	➢ Wave 4 Email (2) campaign was launched successfully on 06/12/23,
	   o Total number of emails delivered: 38,868
	➢ Wave 4 SMS 1) campaign was launch successfully on 06/13/23,
	   o Total number of messages delivered (English + Spanish): 23,940
	➢ BenefitsCal cut over checklist creation is complete and submitted to the Consortium.
	➢ CDSS users to be included in the production final listing. Validation and inclusion to final listing is in-progress.
	Wave 5
	➢ Community Based Organization (CBO) listing for the mock run is finalized and the list was provided to the ForgeRock team on 06/13/23.

UCD Research Activities	➢ Performed and began research for July and August enhancements determining if/what primary or secondary research is needed.
	   o Assess whether more stakeholder research and clarification is required for CSPM-32596 and/or connect with the correct group that specializes in serving people with disabilities to collect information on how to meet the customer accessibility needs.
	➢ Performed Global Search usability testing sessions to test the proposed enhancement. UT guide, reward tracking and scheduling was performed and completed.
	   o Insights gathered and synthesized.
	➢ Planning for customer focus groups to learn more about the experience of customers who want a BenefitsCal account but do not use email.

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	➤ Complete the categorization and evaluation of suggestions for the Help Center sent from Advocates. Get clarification where needed.
Communication and Marketing Campaign Phase 2	➤ Weekly Status Meetings with the Consortium held 06/15/23 ➤ Comments closed on Final Work Plan for Phase 2 (WP 32.01: Communications and Marketing Plan) on 06/19/23. ➤ Kick Off meeting with internal stakeholders scheduled for 06/21/23. ➤ Kick Off meeting with advocate Co-Leads scheduled for 06/22/23.
GetCalFresh (GCF) Parity List Items	➤ Next bi-weekly meeting is scheduled for 06/21/23. ➤ The California Department of Social Services (CDSS) continued mapping the components planned for decommissioning to the parity list items.
Training Environment	➤ Conducted a webinar on 06/14/23 for CBO users based on the latest extract from the ForgeRock PROD instance and Advocate Partners. ➤ The environment access URL, code and pre-approved usernames has been shared with CBOs
Collaboration Model	➤ Continued working on the next collaboration meeting agenda prep, which is scheduled for 06/23/23.

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2   PMO

1.2.1   Highlights of the Reporting Period

➢ **Deliverables and Work Products submitted:**
   o FWP 32.01: Communications and Marketing Plan on 06/13/23.

1.2.2   Activities for the Next Reporting Period

➢ **Deliverable and Work Product submissions for next week:**
   o FWP 24.18: CX Report – April/May 2023 on 06/21/23.
   o FWP 25.16: Monthly M&O Report – May 2023 on 06/21/23.

1.3   BenefitsCal Collaboration Model (CM)

1.3.1   Highlights of the Reporting Period

➢ Continued to prepare a roadmap for the CM model prioritized items.
➢ Identified Collaboration Model priorities as enhancements versus action items to perform additional research.

The table below contains all enhancements prioritized by Collaboration Model and their updates from this week:

ID	Summary	Status	Update this Week
CSPM-64320 (Enhancement)	Collaboration Model: Create a global search bar on BenefitsCal	Design Update Needed	Draft prototypes sent for Advocate feedback, awaiting feedback
CSPM-64323 (Action Item)	Research for CM Enhancement: Public dashboard of BenefitsCal data	In Progress	Research in progress
CSPM-35858 (Enhancement)	Add an option for Primary Applicant to apply for No Programs	Design Update Needed	Draft prototypes sent for Advocate feedback, awaiting feedback
CSPM-66157 (Enhancement)	Redesign the BenefitsCal announcements	Awaiting Prioritization	N/A
CSPM-66213 (Enhancement)	Redesign the BenefitsCal homepage to create additional points of access for existing and new users	Awaiting Prioritization	N/A-

Table 1.3-1 – Enhancements Updates, Prioritized by CM

1.3.2 Activities for the Next Reporting Period

➢ Perform design, development, and implementation analysis for enhancements and research action items identified in the Collaboration Model.

The table below contains all enhancements prioritized by CM (not yet delivered to production) and planned activities for the next week.

ID	Summary	Activity for Next Week	Target Delivery Date
CSPM-64320 (Enhancement)	Collaboration Model: Create a global search bar on BenefitsCal	Begin Design work after capturing Advocate feedback	July 2023
CSPM-64323 (Action Item)	Research for CM Enhancement: Public dashboard of BenefitsCal data	Continue Research	June 2023
CSPM-35858 (Enhancement)	Add an option for Primary Applicant to apply for No Programs	Begin Design work after capturing Advocate feedback	July 2023
CSPM-66157 (Enhancement)	Redesign the BenefitsCal announcements	Conduct Effort Estimation	August 2023
CSPM-66213 (Enhancement)	Redesign the BenefitsCal homepage to create additional points of access for existing and new users	Conduct Effort Estimation	August 2023

Table 1.3-2 – Planned Activities for Next Reporting Period for Enhancements, Prioritized by CM

2.0 Application Development and Test

2.1 Requirements and Design

2.1.1 Highlights of the Reporting Period – Requirements and Design

➢ **Designs**
  o Work on designs for the July 2023 enhancements.
  o Continued pre-design work for the CalWORKs Time Clocks for requirements FN-105.1 and FN-135.
  o Worked on analysis of SSA Get CalFresh flow based on SCERFRA 23-500 for implementation in BenefitsCal.
  o Met with the Code for America team for a working session on the current SSA application mapping from GetCalFresh to BenefitsCal on 06/16/22.
  o Worked with the ODI team to analyze referral data and request raw data from GetCalFresh team.

2.1.2 Activities for the Next Reporting Period – Requirements and Design

➢ **Designs**
  o Continue design work for the July 2023 enhancements.
  o Continue design work for the CalWORKs Time Clocks for requirements FN-105.1 and FN-135.
  o Continue analysis of SSA Get CalFresh flow based on SCERFRA 23-500 for implementation in BenefitsCal.
  o Present CalWORKs Time Clocks designs (FN-105.1 and FN-135) to Time Limit Committee on 06/22/23.

2.1.3 Highlights of the Reporting Period – User Centered Design (UCD)

➢ **Customer Experience (CX) Measurements Data**
  o Monitored the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues during the week of 05/12/23.
➢ **Customer Engagement**
  o Continued planning for customer focus groups to learn more about the experience of customers who want a BenefitsCal account but do not use email.
➢ **Enhancements**
  o Started collaborating with the Design/Functional team to create mockups for August enhancements based on customer and stakeholder research.
➢ **Advocate Engagement**
  o Sent July enhancements to the Advocate & CBO for review and feedback by 06/14/23.

2.1.4 Activities for the Next Reporting Period – UCD

➢ **CX Measurements Data**
  o Monitor the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues during the week of 06/19/23.
  o Respond to comments and submit FWP 24.18 CX Report – June 2023 for submission on 06/21/23.
➢ **Customer Engagement**
  o Continue planning for customer focus groups to learn more about the experience of customers who want a BenefitsCal account but do not use email.
  o Develop insights from customer and stakeholder research to begin designing the August enhancements.
➢ **Enhancements**
  o Continue to collaborate with the Design/Functional team to create mockups for August enhancements based on customer and stakeholder research.
➢ **Advocate Engagement**
  o Prep materials for UCD Monthly Meeting on 06/28/23.
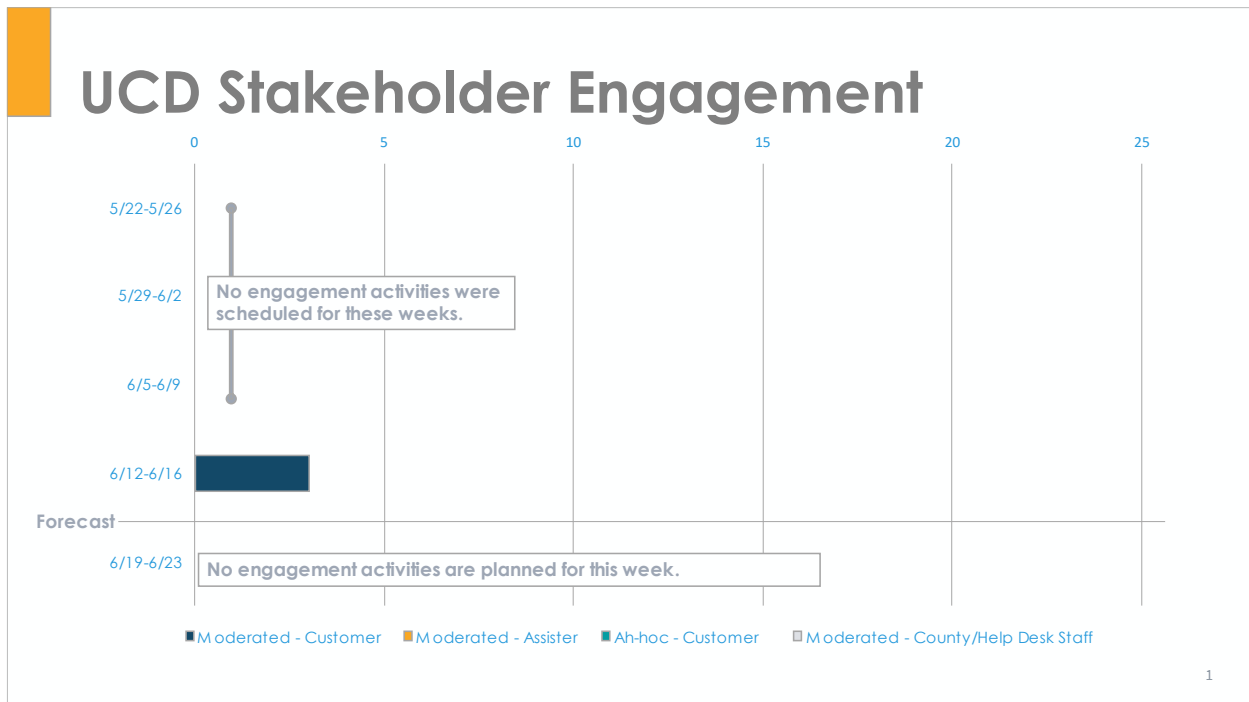
Figure 2.1-1 – UCD Stakeholder Engagement

2.2   Development

2.2.1   Highlights of the Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 06/16/23	Actual for Week Ending 06/16/23	Total Planned for the Release	Comments
23.06.22	1	1	15	

Table 2.2-1– Enhancement Actuals for Reporting Period

➢ **Release of Information [DDI]**
   o Completed three (3) widgets.
   o Support for UAT testing is in progress.

2.2.2 Activities for the Next Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 06/23/23	Total Planned for the Release	Total Completed for the Release	Comments
23.06.22	0	15	15	
23.07.03	0	1	0	CSPM-65483: CalWIN Wave 4 rollout planned for 06/03/23.
23.07.27	3	12	2	

Table 2.2-2 – Planned Enhancement Work

➢ **Release of Information [DDI]**
   o Support for UAT testing is in progress.

Unscheduled Release Updates

➢ **Chatbot**
   o For the 25 issues that we have reported earlier related to Currency Slot and Custom Slot for Chinese, Japanese, and Korean languages, the AWS team is updating the Language model at their end and the provided ETA for those fixes is June 2023.
   o The AWS team stated they have rolled out the fix for the mute detection issue in the Spanish, Korean, and Japanese languages, but during validation, we found the issue was still reproduceable in the Spanish and Korean languages. The AWS team is yet to provide an ETA for the resolution and fix. This is being tracked by CSPM-56537.

2.3 System Test Execution

2.3.1 Highlights of the Reporting Period – System Test Execution

➢ **Release 23.06.22 – June Monthly Release**
   o Continued validating the June Release Enhancements and coordinated with the partners for any end-to-end validation.

2.4 Activities for the Next Reporting Period – System Test Execution

➢ **Release 23.06.22 – June Monthly Release**
   o Deploy the June Monthly Release code into production (PRD) on 06/22/23.

2.5   User Acceptance Test (UAT) Planning

2.5.1   Highlights of the Reporting Period – User Acceptance Test Planning

➢ **UAT Test Execution**
- o None for the period.

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

➢ **Test Support**
- o None for the period.

3.0 Performance Test

3.1   Highlights of the Reporting Period – Performance Test

➢ **CalWIN ISS Support Integrated performance test plan**
- o Successfully executed two (2) additional 100% volume endurance performance tests this week by further lowering the Create document event load. The observation and results from these tests are shared with CalSAWS and Hyland teams and the detailed JMeter reports are uploaded to CalSAWS SharePoint. This series of performance tests should conclude the CalWIN Statewide rollout Integrated testing.

3.2   Activities for the Next Reporting Period – Performance Test

> o   None for this period

Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	05/19/23	06/07/23	CalWIN Statewide rollout	**Scope:** The BenefitsCal team has identified 32 scripts leveraging and exercising Hyland Imaging APIs for the second round of Integrated testing with the CalSAWS and Hyland teams. **Executions:** Friday, 05/19/23 – Integrated full load Performance Pre-Test Monday, 05/22/23 – Integrated Performance Test Wednesday, 05/24/23 – Endurance Test #1 Wednesday, 05/31/23 – Stress Test Friday, 06/02/23 – Endurance Test #2 Wednesday, 06/07/23 – Endurance Test #3 Thursday, 06/15/23 - Endurance Test #4 Friday, 06/16/23 - Endurance Test #5	100%

Table 3.2-1 – Performance Test Cycles and Test Case Status

4.0 Security

4.1   User Conversion

4.1.1   Highlights of the Reporting Period – User Conversion Testing

> ➤ **CalWIN Conversion**
>   o   The Wave 5 CBO User list was provided to ForgeRock for use in the Wave 5 Mock Run

4.1.2   Activities for the Next Reporting Period – User Conversion Testing

> ➤ **Perform CBO User Data Validation**
>   o   Identify Primary Points of Contact (PPOCs) for the rest of the CalWIN Counties to perform Community Based Organization (CBO) user data validation.

4.2   Security

4.2.1   Highlights of the Reporting Period – Security

➢ **SAST**
  o Executed the weekly Static Application Security Testing (SAST) of the application source code and shared the analysis of the security scan reports with the BenefitsCal Development Team for remediation on 06/16/23.

4.2.2   Activities for the Next Reporting Period – Security

➢ **Identified Vulnerabilities**
  o 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).
➢ **AWS SSO for BenefitsCal**
  o Collaborate with the Consortium Security Team to update Amazon Web Services Single Sign-On (AWS SSO) users specific to BenefitsCal and facilitate onboarding and offboarding of AWS SSO for BenefitsCal users, as needed.

5.0 Communications

5.1   Highlights of the Reporting Period

➢ No activities planned for the reporting period.

5.2   Activities for the Next Reporting Period

➢ No activities planned for the next reporting period.

6.0 Appendices

6.1   Appendix A – Deliverable Summary

Deliverable Status by Submission

	Complete		Coming Soon		WAC Approval Pending

DEL ID	Deliverable Name	DDED	FDED	DDEL	FDEL	Final Approval
	There are currently no Deliverables scheduled.					

Table 6.1-1 – Deliverable Status for Current Reporting Period

Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
There are currently no Deliverables scheduled.			

<div align="center">**Table 6.1-2 – Upcoming Deliverable Deadlines**</div>

Work Product Status by Submission

	Complete		Coming Soon		WAC Approval Pending

ID	Work Product Name	DWP	FWP	Final Approval
24.18	CX Report – April/May 2023	06/09/23	06/21/23	06/28/23
25.15	Monthly M&O Report – April 2023	05/09/23	05/19/23	05/26/23
25.16	Monthly M&O Report – May 2023	06/09/23	06/21/23	06/28/23
28.13	BenefitsCal Work Plan Monthly Updates – April 2023	N/A	05/05/23	05/16/23
28.14	BenefitsCal Work Plan Monthly Updates – May 2023	N/A	06/05/23	06/14/23
29.13	BenefitsCal Monthly Status Report – April 2023	N/A	05/05/23	05/16/23
29.14	BenefitsCal Monthly Status Report – May 2023	N/A	06/05/23	06/14/23
32.01	Communications and Marketing Plan	05/31/23	06/13/23	06/21/23

<div align="center">**Table 6.1-3 – Upcoming Work Product Deadlines**</div>

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
24.18	CX Monthly Report – April/May 2023	On Track	DWP submitted 06/09/23 FWP submission 06/21/23 FWP approval 06/28/23
25.16	Monthly M&O Report – May 2023	On Track	DWP submitted 06/09/23 FWP submission 06/21/23 FWP approval 06/28/23
28.14	BenefitsCal Work Plan Monthly Updates – May 2023	On Track	FWP Submitted 06/05/23 FWP approval 06/13/23
29.14	BenefitsCal Monthly Status Report – May 2023	On Track	FWP Submitted 06/05/23 FWP approval 06/13/23
32.01	Communications and Marketing Plan	On Track	DWP submitted 05/31/23 FWP submitted 06/13/23 FWP approval 06/21/23

<div align="center">**Table 6.1-4 – Upcoming Work Product Deadlines**</div>

6.2 Appendix B – Risks and Issues Summary

Project Risks and Issues

ID	Title	Details	Status	Impact	Probability	Date Logged
246	Perceived Gap in Functionality	A perceived gap in functionality between GetCalFresh and BenefitsCal was identified. Select features identified within GetCalFresh are not present within BenefitsCal as they are not part of the project requirements, and change requests were logged to address. Impacts BenefitsCal adoption by Community Partners may be lower as they rely on features (like the referral code) to complete their work. The future migration from GCF to BenefitsCal in 2022 is at risk until features are added to BenefitsCal. Status Updates: November 11, 2022 ► CDSS is currently reviewing the final list to confirm dispositions and next steps for prioritization. Any items that are identified as "must have" will be taken to collaboration model meeting. CDSS is targeting the end of the calendar year to complete the review. January 8, 2023 ► BenefitsCal team has started working on the effort estimations for the gaps list (31 gaps/52 enhancements). CWDA and Consortium will provide direction on the implementation schedule. May 5, 2023 ► Participated in bi-weekly meeting on 05/03/23. ► CDSS informed the group about the funding confirmation for SCERFRA 23-512 and CF 303 components. There is a follow up meeting on 5/9/23 for the plan	Open	2	Medium	05/10/21

ID	Title	Details	Status	Impact	Probability	Date Logged
		► CDSS continued the mapping of the components planned for decommissioning to parity list items				

Table 6.2-1 – Project Risks and Issues

6.3 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
0174-23	Notify (All); usbenefitscaldevops@deloitte.com; operator@calheers.ca.gov	Scheduled Downtime Notification	CalSAWS M&E	05/26/23	Anand Kulkarni	Pete Quijada
0193-23	PPOCs (48); Regional Managers; Self Service Portal Committee; Imaging Committee	CalSAWS Imaging – Viewing Images Uploaded Through BenefitsCal	CalSAWS M&E	05/23/23	Rhiannon Chin	Inez Finnigan
0200-23	PPOCs (Solano, Santa Cruz, San Mateo, San Diego); IPOCs (Wave 4)	Wave 4 CalWIN County Go-Live Packet	CalWIN Migration	05/31/23	Kishan Mallur	Rachel Frey
0207-23	PPOCs (48, San Diego, San Mateo, Santa Cruz, Solano); Regional Managers; Help Desk; Production Operations	Wave 4B Cutover Weekend Calendar Infographic	CalSAWS M&E	06/01/23	Art Robles	Lesley Pevny

Table 6.3-1 – 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	Primary BenefitsCal Contact	Backup BenefitsCal Contact
23-078	PPOCs (Alameda, Fresno, Sonoma); Regional Managers	CalWIN Counties BenefitsCal Options – Wave 5	05/24/23	Open	06/08/23	Marsale Eramya	Carlos Zepeda
23-079	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers (R1, R5)	Wave 4 – Request for Counties to Identify Point of Contact for CBO Support	05/30/23	Open	06/13/23	Marsale Eramya	Carlos Zepeda

Table 6.3-2 – CRFIs

6.4 Appendix C – Project Work Plan Reports

Project Timeline
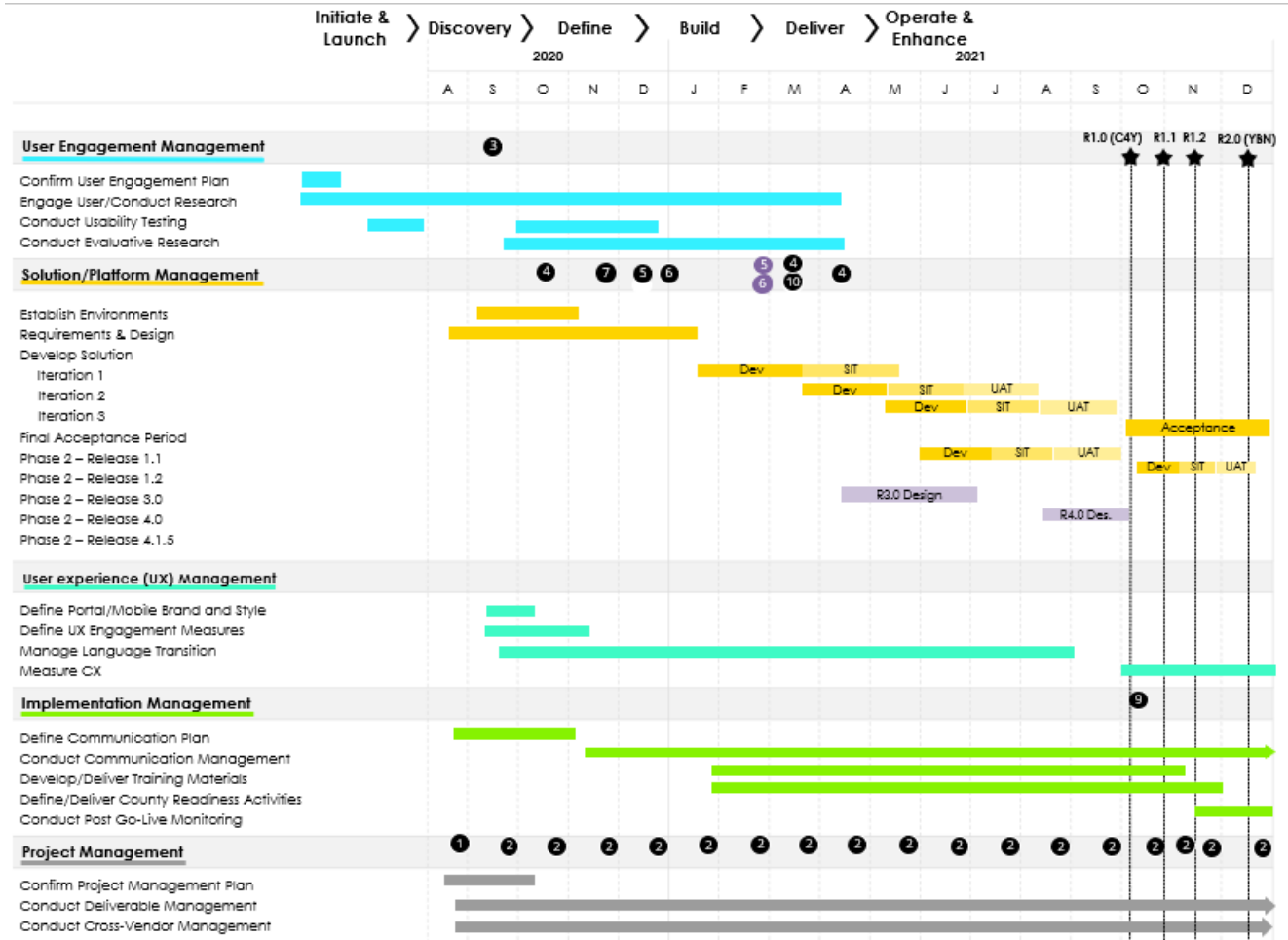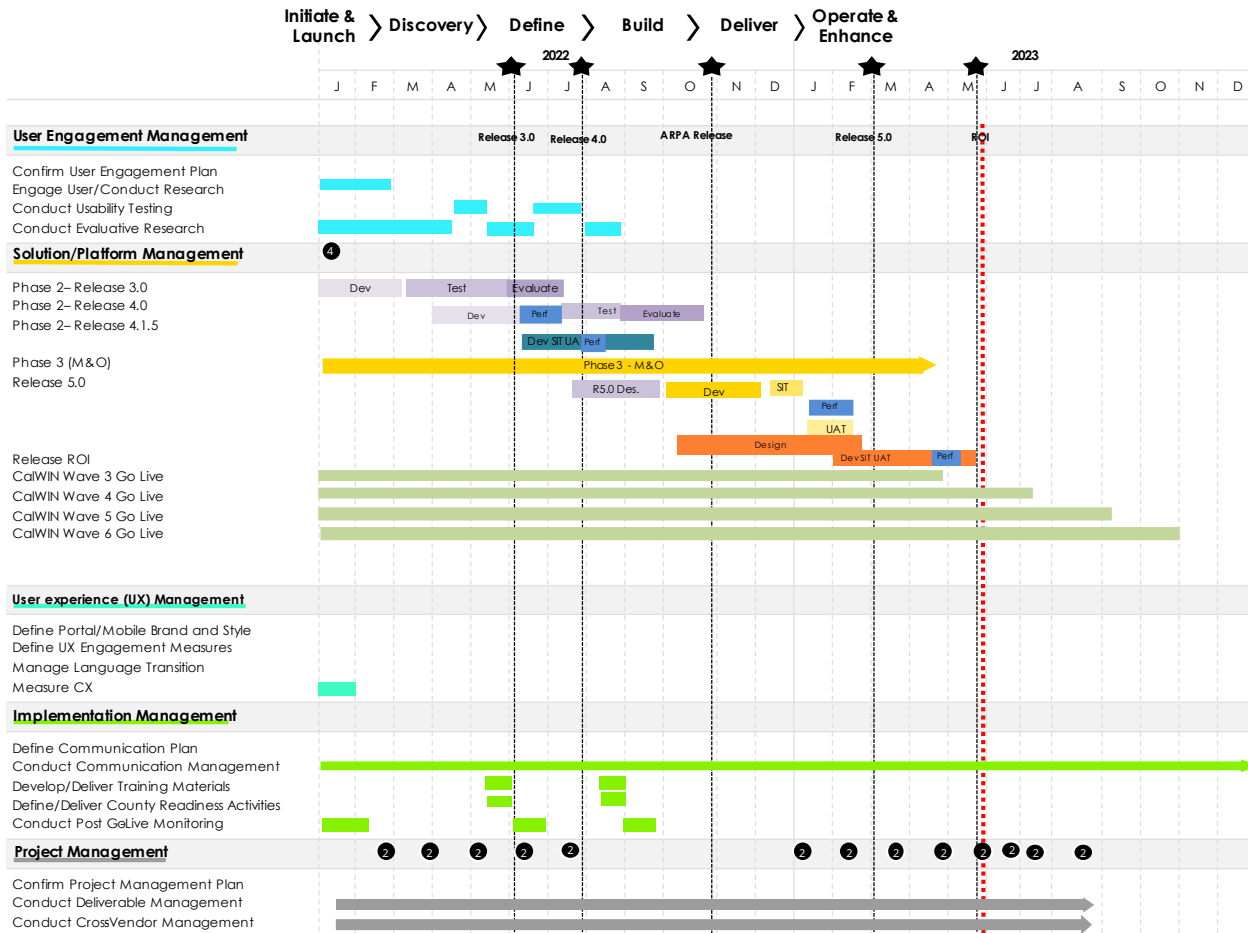
Project Action Items – Overdue

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

ID	Description	Owner	Due Date
None			

Table 6.4-1 – Overdue Action Items