CalSAWS BenefitsCal (Portal/Mobile) Weekly Status Report

Reporting Period: July 31, 2023 to August 6, 2023

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
August Enhancements	➢ Release 23.08 will be deployed to production as planned on 07/27/23: o Twelve (12) enhancements will be delivered with the 23.08.24 Release
CalWIN ISS Support	**Wave 4** ➢ M&O service management is in progress. ➢ Health Metrics generation is in progress. **Wave 5** ➢ Process Simulation Support is complete. ➢ Email (1) campaign launch complete. ➢ Email (2), SMS (1) campaign launch prep is in progress. ➢ Production extract of CBO user conversion list is in progress. **Wave 6** ➢ County review of CBO user information extract from MyBCW for Wave 6 Counties to perform Mock Run 1 is complete. ➢ CBO user conversion list hand off to ForgeRock for mock run execution is complete. ➢ CBO user conversion mock-run is in progress.
UCD Research Activities	**Customer Experience (CX) Measurements Data** ➢ 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 07/31/23. ➢ Conduct security discussions regarding the CX Pod. **User Engagement** ➢ Conducted three (3) usability testing sessions for Timeclocks. ➢ Conducted two (2) discovery research sessions with SSA assisters to learn about their experience with the SSA application for 07/31/23 and 08/01/23. ➢ Completed recruitment and development of the focus group protocol for SSA county workers during the week of 07/31/23. **Enhancements** ➢ Submitted enhancement request for the Collaboration Model based off UCD research and insights.

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	➢ Wrote content and copy for the chatbot enhancement FAQ section. ➢ Designed September enhancements. **Advocate Engagement** ➢ Prepared and facilitated the CWDA weekly check-in meeting on 07/31/23. ➢ Sent September enhancement designs to the Advocates for review.
Communication and Marketing Campaign Phase 2	➢ Email Templates (English) are being prepared for setup- 8/3/23 ➢ All email campaigns have been sent for translations – 8/4/23 ➢ Email Translations prepared and sent to development team - 8/4/23 ➢ Video script, promo cards, and brochure sent for translation – 8/4/23 ➢ BenefitsCal Team and BenefitsCal Consortium to resolve comments – 8/2/23 ➢ Additional revisions made to all deliverables per the comments log and meeting with LA County 8/3/23 ➢ Scheduled Advocate FWP review for 8/10/23 – 8/3/23 ➢ Scheduled Stakeholder FWP review for 8/10/23 – 8/3/23 ➢ Fact sheet approved by ISS and is ready to be uploaded to Training/Fact Sheet folder on Sharepoint site for Go Live Packets distributed on or before 9/4 – 8/4/23 ➢ Counties opt in / out list campaigns due from BenefitsCal Consortium by 8/10/23 ➢ FWP to be completed by 8/10/23

Collaboration Model	➢ New enhancement requests are being collected for the upcoming September Quarterly Meeting.
	 ➢ Following CM enhancements will be delivered with August 2023 Release (23.08):
	     o CSPM-35858: Add help text for ineligible primary applicants
	     o CSPM-66157: Redesign the BenefitsCal announcements
	     o CSPM-66213: Redesign the BenefitsCal homepage to create additional points of access for existing and new users

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 None for the reporting period.

1.2.2 Activities for the Next Reporting Period

➢ **Deliverable and Work Product submissions for next reporting period:**
   o DWP 24.19: CX Report – June/July 2023 on 08/11/23.
   o DWP 25.18: Monthly M&O Report – July 2023 on 08/09/23.
   o FWP 28.16: BenefitsCal Work Plan Monthly Updates – July 2023 on 08/07/23.
   o FWP 29.16: BenefitsCal Monthly Status Report – July 2023 on 08/07/23.

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-64323 (Action Item)	Research for CM Enhancement: Public dashboard of BenefitsCal data	In Progress	Research in progress
CSPM-35858 (Enhancement)	Collaboration Model: Add help text for ineligible primary applicants	UAT Deployed	Completed Development & SIT, deployed to UAT
CSPM-66157 (Enhancement)	Redesign the BenefitsCal announcements	Analysis In Progress	Enhancement reopened after identifying issues in SIT, Working on fixing
CSPM-66213 (Enhancement)	Redesign the BenefitsCal homepage to create additional points of access for existing and new users	Development In Progress	Continued Development
CSPM-43163 (Enhancement)	Restrict the user to create multiple Redeterminations and Periodic	Prioritization Approved	N/A

ID	Summary	Status	Update this Week
	reports associated with a particular case number		

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-64323 (Action Item)	Research for CM Enhancement: Public dashboard of BenefitsCal data	Continue Research	TBD
CSPM-35858 (Enhancement)	Collaboration Model: Add help text for ineligible primary applicants	Support QA/Consortium Testing	August 2023
CSPM-66157 (Enhancement)	Redesign the BenefitsCal announcements	Continue Development Activities/Defect Fix	August 2023
CSPM-66213 (Enhancement)	Redesign the BenefitsCal homepage to create additional points of access for existing and new users	Continue Development Activities/Defect Fix	August 2023
CSPM-43163 (Enhancement)	Restrict the user to create multiple Redeterminations and Periodic reports associated with a particular case number	Further discussions needed with CalSAWS to design the Renewal Tracker, as well as other stakeholders to review the draft design.	September 2023
N/A	N/A	Analyze the Q2 Prioritization Results for the 7 enhancements prioritized in the last CM survey that closed on 07/05/23. Log Research Items/SCRs based on the above analysis.	N/A

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 Continued working with development and testing teams for the July 2023 enhancements.
  o Continued working with development and testing teams for the August 2023 enhancements.
  o Began design activities for the September 2023 enhancements.
  o Continued design activities for the CalWORKs Time Clocks for requirements FN-105.1 and FN-135.
  o Began responding to comments from stakeholder groups on BenefitsCal Release 23.11.19 (CalWORKs Time Clocks) submissions.
  o Continue work on SSA Application on BenefitsCal enhancement CSPM-65292.
  o Presented BenefitsCal Release 23.11.19 (CalWORKs Time Clocks) proposed designs at the Self-Service Portal Committee Meeting on 08/01/23.
  o Discussed Collaboration Model enhancements with CWDA partners on 07/31/23.

2.1.2 Activities for the Next Reporting Period – Requirements and Design

➢ **Designs**
  o Continue working with development and testing teams for the July 2023 enhancements.
  o Continue working with development and testing teams for the August 2023 enhancements.
  o Continue design activities for the September 2023 enhancements.
  o Continue design activities for the CalWORKs Time Clocks for requirements FN-105.1 and FN-135.
  o Continue responding to comments from stakeholder groups on BenefitsCal Release 23.11.19 (CalWORKs Time Clocks) submissions.
  o Continue work on SSA Application on BenefitsCal enhancement CSPM-65292.
  o Discuss CalFresh parity items with CalSAWS in preparation for partner impacts on 08/07/23.

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 07/31/23.
  o Conduct security discussions regarding the CX Pod.
➢ **User Engagement**
  o Conducted three (3) usability testing sessions for Timeclocks.
  o Conducted two (2) discovery research sessions with SSA assisters to learn about their experience with the SSA application for 07/31/23 and 08/01/23.
  o Completed recruitment and development of the focus group protocol for SSA county workers during the week of 07/31/23.
➢ **Enhancements**
  o Submitted enhancement request for the Collaboration Model based off UCD research and insights.
  o Wrote content and copy for the chatbot enhancement FAQ section.
  o Designed September enhancements.
➢ **Advocate Engagement**
  o Prepared and facilitated the CWDA weekly check-in meeting on 07/31/23.
  o Sent September enhancement designs to the Advocates for review.

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 08/07/23.
  o Develop and provide problem statements to the CX Pod to conduct analysis on the database.
  o Attend the CX Investigating Weekly Working Session.
  o Connect with our Amplitude vendor on a monthly cadence.
➢ **User Engagement**
  o Conduct recruitment and development of the usability testing protocol for Chatbot during the week of 08/08/23.
  o Conduct two (2) discovery research sessions with SSA county workers to learn about their experience with the SSA application on 08/08/23 and 08/09/23.
➢ **Enhancements**
  o Work on enhancement planning with the functional team.
  o Attend two (2) Chatbot planning sessions.
  o Attend two (2) SSA planning sessions.
  o Review October enhancements.
➢ **Advocate Engagement**
  o Prepare and facilitate the CWDA weekly check-in meeting on 08/07/23.
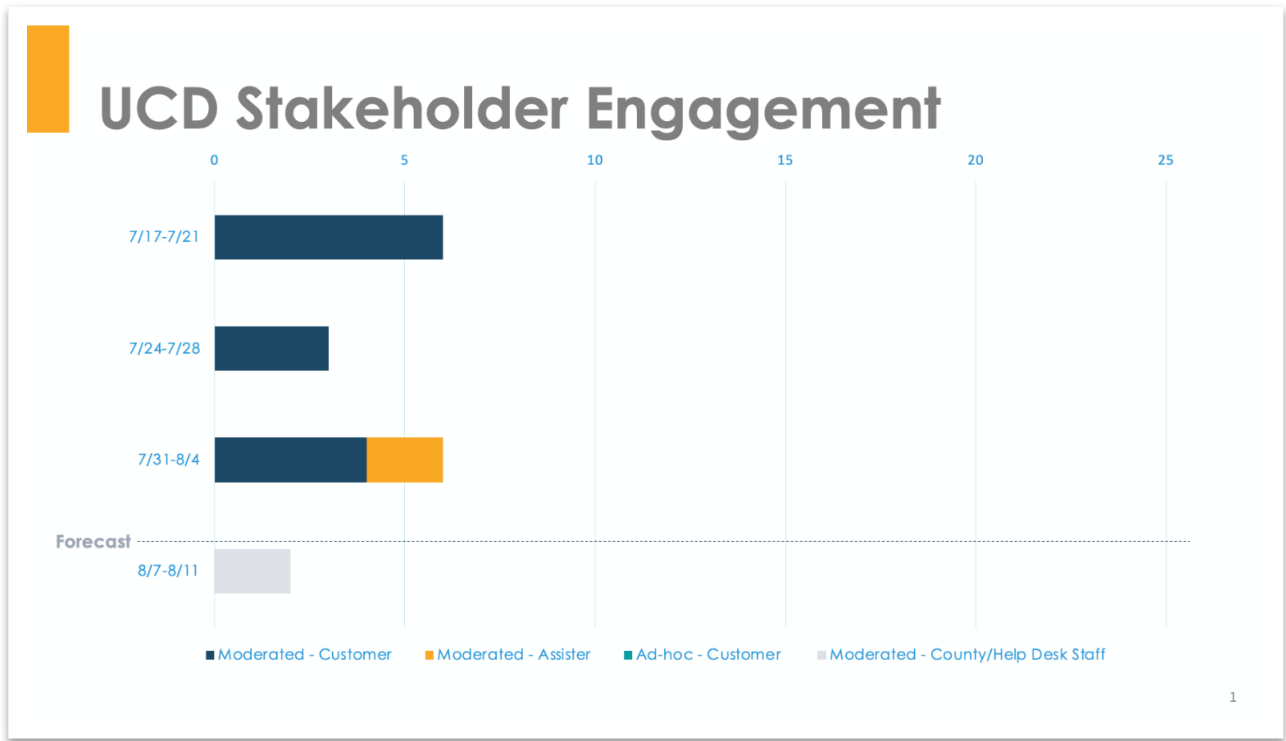
Figure 2.1-1 – UCD Stakeholder Engagement

2.2   Development

2.2.1   Highlights of the Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 08/11/23	Actual for Week Ending 08/11/23	Total Planned for the Release	Comments
23.08.24	4	3	11	CSPM-66157 is still DEV in progress Status since there were some additional changes requested and GSDs were updated.

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 08/18/23	Total Planned for the Release	Total Completed for the Release	Comments
23.08.24	6	11	3	

Table 2.2-2 – Planned Enhancement Work

Unscheduled Release Updates

> **Chatbot**
>   o The POC for chatbot is completed and CSPM-65313 is planned for September release.

2.3 System Test Execution

2.3.1 Highlights of the Reporting Period – System Test Execution

> **Release 23.08.02 – August Priority Release**
>   o Fixed the issue where ROI link was enabled for customers.
>   o Deployed the priority Release into Production on 08/02/23.
> **Release 23.08.24 - August Monthly Release**
>   o Continued validating the August Monthly Release Tickets and coordinated with the partners for any end-to-end validation.
>   o Planned first UAT build – 08/31/23.

2.4 Activities for the Next Reporting Period – System Test Execution

> **Release 23.08.24 – August Monthly Release**
>   o Continue validating the tickets planned for August release and coordinate with the partners for any end-to-end validation.

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

➢ **Release 23.08.24 – August Monthly Release**
  o The BenefitsCal performance team continues to enhance the scripts with the scope of the August release. The performance testing team will execute the test with the Mock services in the Perf environment and share the results with the development team.

3.2 Activities for the Next Reporting Period – Performance Test

➢ **Release 23.08.24 – August Monthly Release**
  o Continue working on the August release enhancements performance testing activities and plan the test executions accordingly.

Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	08/19/23	07/21/23	Release 23.07.27 – July Monthly Release	**Scope:** Seven (7) BenefitsCal enhancements and updated features for July release requiring updates to existing AFB, Document upload, new add announcement and new Help Center search scripts **Executions**: Friday, 07/07/23 – Isolated performance test with Mock services testing few enhancements Friday, 07/14/23 – Isolated performance test with Mock services including all enhancements Monday, 07/17/23 – Isolated performance test with Mock services including all enhancements	100%

Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	07/24/23	08/18/23	Release 23.08.24 – August Monthly Release	**Scope:** Five (5) BenefitsCal enhancements and updated features for August release requiring updates to existing CBO manager and assistor, Document upload and add announcement scripts. AWS Lambda inspector requires no script change but will monitor the performance of all lambdas. **Executions:** Tuesday, 08/08/23 – Isolated performance test with Mock services testing few enhancements	33%

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 Provided the Wave 6 Mock CBO User Conversion listing to the ForgeRock team to use for the Wave 6 Mock load.

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.
  o Review the Wave 6 Mock Run CBO User Feedback Report.

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 08/04/23.

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.			

Table 6.1-2 – Upcoming Deliverable Deadlines

Work Product Status by Submission

ID	Work Product Name	DWP	FWP	Final Approval
		Complete	Coming Soon	WAC Approval Pending
24.18	CX Report – April/May 2023	06/09/23	06/21/23	06/28/23
24.19	CX Report – June/July 2023	08/11/23	08/23/23	08/30/23
25.17	Monthly M&O Report – June 2023	07/11/23	07/21/23	07/28/23
25.18	Monthly M&O Report – July 2023	08/09/23	08/21/23	08/28/23
26.05	BOM Review and License Renewals	N/A	07/07/23	07/18/23
27.05	Certificate Review	N/A	07/07/23	07/18/23
28.15	BenefitsCal Work Plan Monthly Updates – June 2023	N/A	07/10/23	07/19/23
28.16	BenefitsCal Work Plan Monthly Updates – July 2023	N/A	08/07/23	08/15/23
29.15	BenefitsCal Monthly Status Report – June 2023	N/A	07/10/23	07/19/23
29.16	BenefitsCal Monthly Status Report – July 2023	N/A	08/07/23	08/15/23
32.01	Communications and Marketing Plan	05/31/23	06/13/23	06/21/23

Table 6.1-3 – Upcoming Work Product Deadlines

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
24.19	CX Report – June/July 2023	On Track	DWP submission 08/11/23 FWP submission 08/23/23 FWP approval 08/30/23
25.18	Monthly M&O Report – July 2023	On Track	DWP submission 08/09/23 FWP submission 08/21/23 FWP approval 08/28/23
28.16	BenefitsCal Work Plan Monthly Updates – July 2023	On Track	FWP submission 08/07/23 FWP approval 08/15/23
29.16	BenefitsCal Monthly Status Report – July 2023	On Track	FWP submission 08/07/23 FWP approval 08/15/23

Table 6.1-4 – Upcoming Work Product Deadlines

6.2   Appendix B – Risks and Issues Summary

Project Risks and Issues

ID	Title	Details	Status	Risk Level	Severity	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: September 2, 2022: • Had multiple meetings with CDSS to discuss the GetCalFresh Gap List with Consortium and CWDA, latest on 08/29/22. There is a bi-weekly meeting cadence. Currently there are few enhancement suggestions from CDSS on partial gaps. Teams are going to continue having working sessions to decide any of these must have or nice to have September 30, 2022: • Continued working sessions with CDSS, CWDA, Consortium and CalSAWS. With the CDSS's analysis, there is total of 41 gaps. 32 are logged as enhancements for prioritization and the remaining 9 will be discussed at upcoming working sessions. There is also a plan to identify/classify must have vs nice to have items. Next working session is scheduled for 10/05/22. January 6, 2023: • BenefitsCal team has started working on the effort estimations for the gaps list (31 gaps/52 enhancements). Targeting to complete the estimations by 01/16 and propose prioritization. CDSS.	Open	Low	Medium	05/10/21

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		CWDA and Consortium will provide direction on the implementation schedule.				
		January 11, 2023:				
		• Prioritization is requested by end of month so it can be incorporated into the roadmap				
		February 2, 2023:				
		• Provided responses to CDSS SCERFRA with estimates for GCF parity list items. CDSS to confirm the SCERFRA approval and prioritization to establish a roadmap for implementation.				
		February 3, 2023:				
		• Attended meeting with CDSS, CalSAWS, and CWDA for the GCF Parity List on 02/02/23. Provided responses to CDSS SCERFRA with estimates for GCF parity list items.				
		March 3, 2023:				
		• RMG: Attended meeting with CDSS, CalSAWS, and CWDA for the GCF Parity List on 03/01/23. CDSS to confirm the SCERFRA approval and prioritization to establish a roadmap for implementation				
		April 7, 2023				
		• Attended meetings with CDSS, CalSAWS, and CWDA for the GCF Parity List on 03/22/23 and 04/05/23. CDSS shared decommissioning timeline got GCF components/CDSS will map the components planned for decommissioning to parity list items to confirm the SCERFRA approval, funding source and prioritization to establish a roadmap for implementation				
		April 28, 2023:				
		• Attended meetings with CDSS, CalSAWS, and CWDA for the GCF Parity List on 03/22/23 and 04/19/23. CDSS is currently mapping the components planned for decommissioning to parity list items and will confirm the				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		SCERFRA approval for SCERFRA 23-512, CDSS is also confirming the funding source to establish a roadmap for implementation. Next meeting is scheduled on 05/03/23 June 2, 2023 • Participated in the bi-weekly meetings on 05/03/23 and 05/17/23. Worked with the California Welfare Directors Association (CWDA) and the Consortium and provided line-item level analysis for a Legislative request on 05/19/23. Next bi-weekly meeting is scheduled for 06/07/23. The California Department of Social Services (CDSS) continued mapping the components planned for decommissioning to the parity list items. June 30, 2023: • Bi-weekly meeting conducted with CDSS, CWDA, Consortium and CalSAWS on 06/21/23. CDSS to provide final list of excel extract of items based on legislative response. Also, teams continued to work with ODI team on the analysis and data needs/questions June 9, 2023: BenefitsCal and CalSAWS teams connected with ODI on Friday 06/09. Next steps identified for ODI to provide the raw data from GCF to begin the analysis. June 2, 2023: • Participated in the bi-weekly meetings on 05/03/23 and 05/17/23. Worked with the California Welfare Directors Association (CWDA) and the Consortium and provided line-item level analysis for a Legislative request on 05/19/23. Next bi-weekly meeting is scheduled for 06/07/23. The California Department of Social Services (CDSS) continued mapping the components planned for				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		decommissioning to the parity list items.				
290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers	Recently issued Release of Information (ROI) policy is not detailed enough, nor is it consistent between the two state Departments (CDSS and DHCS). The policy as written may create customer information privacy/security, safeguard and county operations concerns, and liabilities. As the policy was released after the completion of ROI design, development, and testing of the functionality in BenefitsCal and CalSAWS, counties have not had sufficient time to assess the ROI functionality with the high-level policy and to be able to determine impacts to their county operations and the associated alignment with the existing BenefitsCal/CalSAWS design. The policy as written does not give clear direction on County responsibilities associated with the establishment of CBO agreements, provisions of those agreements and monitoring of CBO compliance with the agreements. Counties also have not had sufficient time to be able to determine if their current CBO agreement language is adequate and includes provisions and protections to further protect customer information when being accessed by CBOs via BenefitsCal. BenefitsCal/CalSAWS initial design and implementation has been postponed until final/revised policy is issued by both CDSS and DHCS and there is operational clarity agreed to by all parties. June 30, 2023: • Risk was reduced to probability of 30% which brings it to an overall medium level. State partners to confirm the topics and agenda items for the workgroup discussions. Topic was also covered during the June JPA Board meeting on 6/29/23. June 16, 2023: • Responded to SIRFRA 1270/1271 regarding Expanding the Release of Information Feature with set of questions to DHCS from	Open	High	High	05/19/23

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		BenefitsCal, CalSAWS, and CWDA on 06/12/23.				

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
None						

Table 6.3-1 – CITs

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

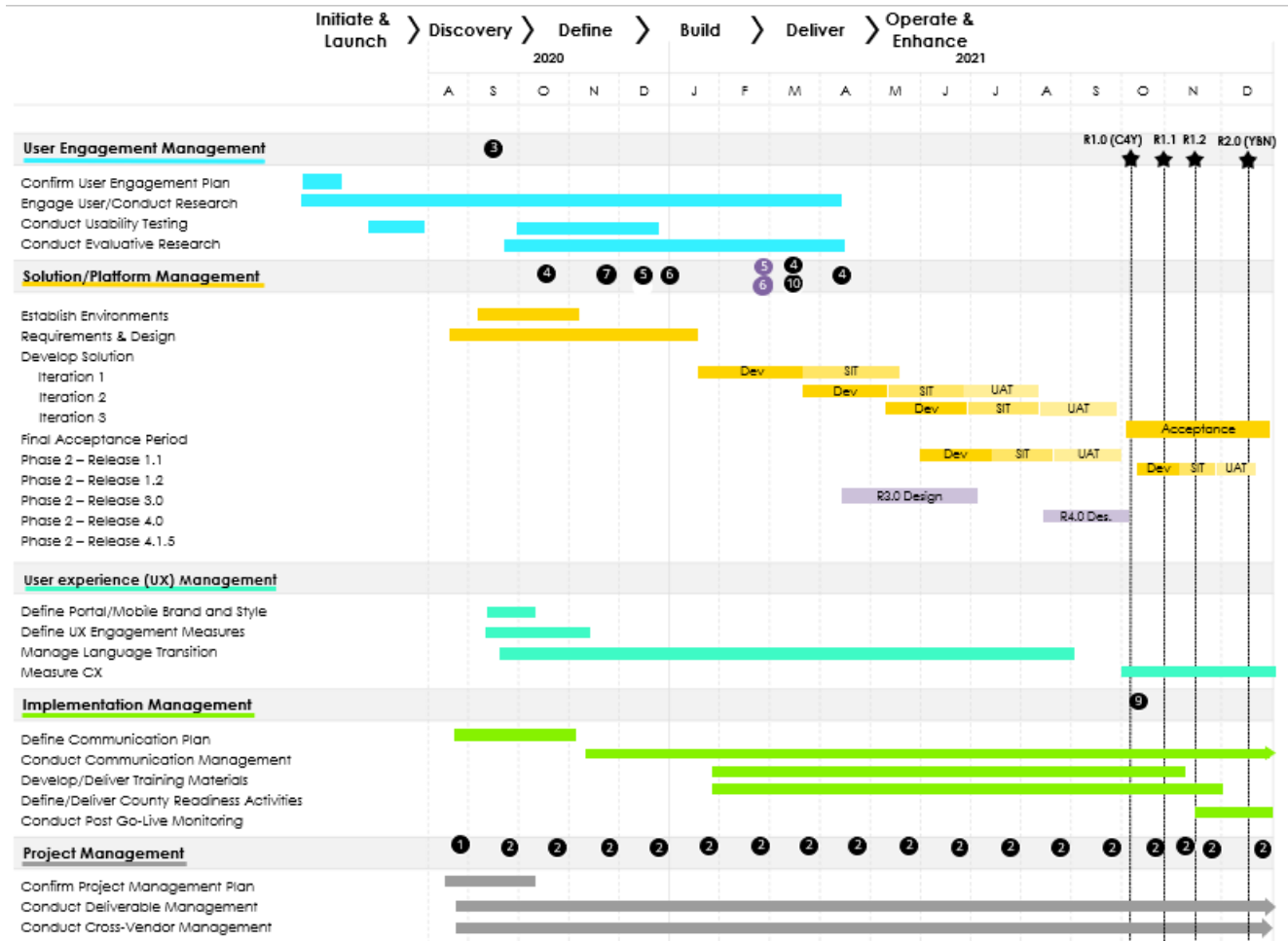| CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary BenefitsCal Contact	Backup BenefitsCal Contact
23-097	PPOC.52, Regional Managers	CalSAWS Counties – BenefitsCal Marketing Campaign County Opt-Ins	07/24/23	Open	08/04/23	Marsale Eramya	Carlos Zepeda

Table 6.3-2 – CRFIs

6.4   Appendix C – Project Work Plan Reports

Project Timeline
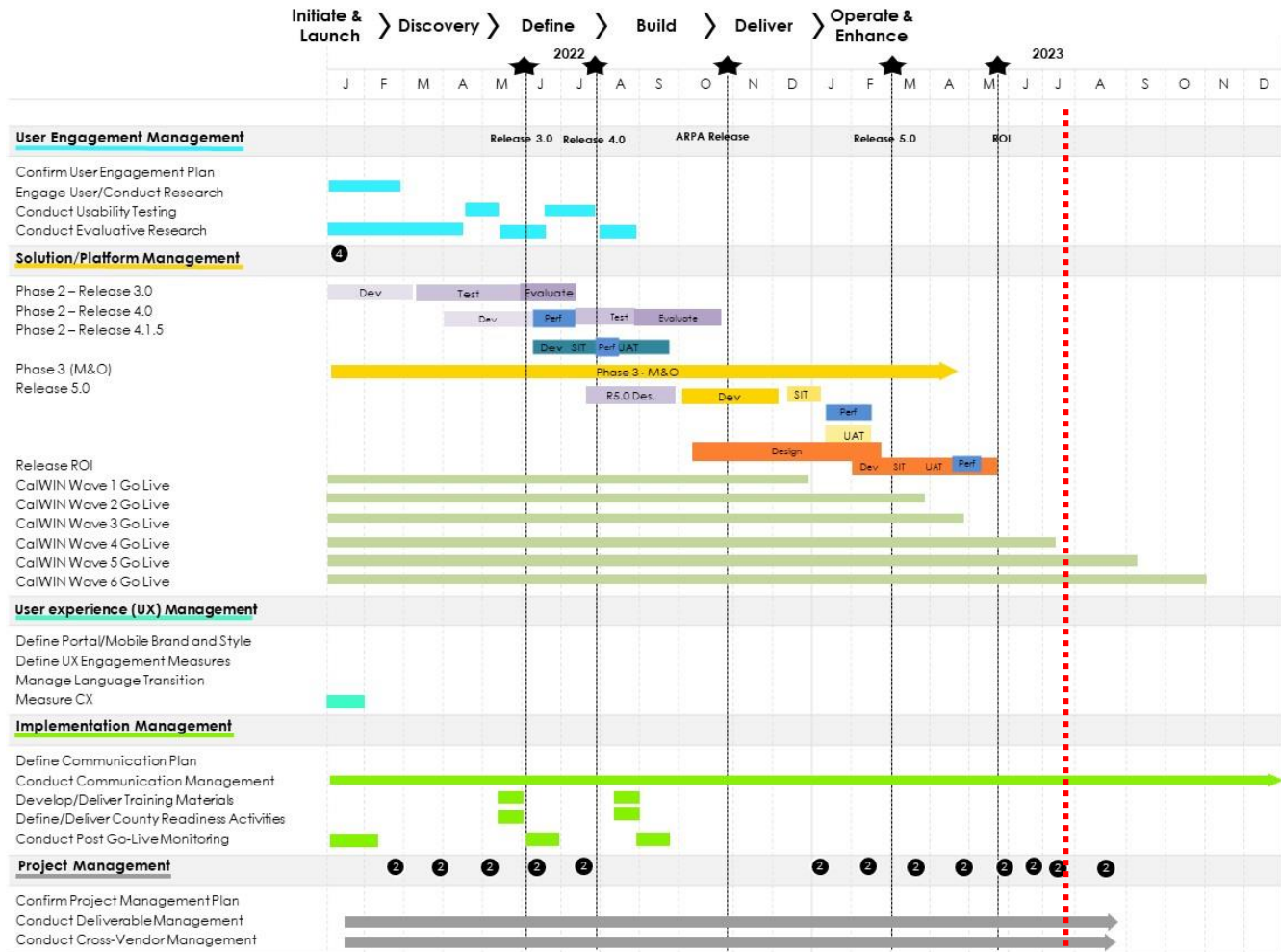
Project Action Items – Overdue

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