

# CalSAWS BenefitsCal (Portal/Mobile) Weekly Status Report

**Reporting Period: September 11, 2023 to  
September 17, 2023**

# CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

Weekly Status Report, September 20, 2023

Period: September 11, 2023 to September 17, 2023

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## 1.0 Project Management

### 1.1 Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
September Enhancements	<ul style="list-style-type: none"> <li>➤ One (1) enhancement will be delivered with the 23.09.24 Release (Aligned with CalSAWS Baseline Release 23.09):                             <ul style="list-style-type: none"> <li>○ One (1) Partner Support Enhancement (CSPM-61588)</li> </ul> </li> <li>➤ Six (6) enhancements will be delivered with the 23.09.28 Release (Regular BenefitsCal Release):                             <ul style="list-style-type: none"> <li>○ Four (4) Production Priority Enhancements</li> <li>○ Two (2) Policy Enhancements</li> </ul> </li> </ul>
CalWIN Implementation Support Services (ISS) Support	<p><b>Wave 5</b></p> <ul style="list-style-type: none"> <li>➤ Maintenance &amp; Operations (M&amp;O) service management is in progress.</li> <li>➤ Health Metrics generation is in progress.</li> </ul> <p><b>Wave 6</b></p> <ul style="list-style-type: none"> <li>➤ Process Simulation support is complete.</li> <li>➤ Customer Communication Plan review is complete.</li> <li>➤ Email-1 campaign distribution preparation is in progress.</li> <li>➤ Tier-1 staff, and Community Based Organization (CBO) awareness training are scheduled.                             <ul style="list-style-type: none"> <li>○ Tier-1 Training:                                     <ul style="list-style-type: none"> <li>▪ Sacramento + 55 supported counties: 09/19/23</li> <li>▪ San Francisco + 55 supported counties: 09/21/23</li> <li>▪ San Luis Obispo + 55 supported counties: 09/26/23</li> </ul> </li> <li>○ CBO awareness training scheduled: 09/28/23</li> </ul> </li> <li>➤ The CBO user conversion mock-run is complete, and the exception report has been generated. No exceptions were identified.</li> </ul>
UCD Activities	<p><b>Customer Experience (CX) Measurements Data</b></p> <ul style="list-style-type: none"> <li>➤ 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 09/11/23.</li> <li>➤ Modified bimonthly report template to enhance spacing and visual appeal.</li> <li>➤ Created repository of monthly and quarterly data sources from latest report values.</li> <li>➤ Updated master data tracker with new file naming convention, slide mapping, data pull owners, etc.</li> </ul>

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STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	<ul style="list-style-type: none"> <li>➤ Created an index of data reports and data sources required for the bimonthly report creation.</li> </ul> <p><b>User Engagement</b></p> <ul style="list-style-type: none"> <li>➤ Participated in the Collaboration Model meetings during the week of 09/11/23 to include conversations regarding the September Quarterly Meetings.</li> <li>➤ Facilitated (3) generative/usability testing sessions for Anonymous Doc Upload during the week of 09/11/23.</li> <li>➤ Finalized development of the prototype and usability testing protocol for Anonymous Doc Upload during the week of 09/11/23.</li> <li>➤ Began development of the research and usability testing protocol as well as the prototype for the RE/SAR7 application status tracker during the week of 09/11/23.</li> <li>➤ Began recruitment for the RE/SAR7 application status tracker usability test sessions during the week of 09/11/23.</li> <li>➤ Visited the county of Alameda in providing on-site support to customers during Wave 5 implementation.</li> </ul> <p><b>Enhancements</b></p> <ul style="list-style-type: none"> <li>➤ Completed designs for Anonymous Doc Uploads during the week of 09/11/23.</li> <li>➤ Completed design updates to the Renewals and Periodic Reports (RE/SAR 7) trackers.</li> <li>➤ Updated screen designs to include the enablement of TNB4 on BenefitsCal.</li> </ul> <p><b>Advocate Engagement</b></p> <ul style="list-style-type: none"> <li>➤ Prepared and facilitated the County Welfare Directors Association of California (CWDA) weekly check-in meeting on 09/18/23.</li> <li>➤ Presented and facilitated at the UCD Monthly Prep and UCD Monthly Meeting on 09/18/23 and 09/20/23.</li> <li>➤ Sent out the Anonymous Document Upload materials for Advocate review on 09/20/23.</li> </ul>
Communication and Marketing Campaign Phase 2	<ul style="list-style-type: none"> <li>➤ Metrics reporting has begun and will continue:               <ul style="list-style-type: none"> <li>○ # of customers emailed: 577K</li> <li>○ # of click-throughs to the BenefitsCal site from emails: 29K</li> <li>○ # of views of the BenefitsCal video since 08/30/23 launch: 700+</li> <li>○ Over time, additional trends will be shown, such as actions taken, because of the campaigns.</li> </ul> </li> </ul>

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STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	<ul style="list-style-type: none"> <li>○ Met with the Consortium on 09/20/23 to review results and agreed to meet again next Wednesday for follow-up on results.</li> <li>➤ Per a request from the Advocate Co-Leads, we are preparing ZIP files for brochures, letter, and promo card for them and will communicate with them when completed next week.</li> </ul>
Collaboration Model	<ul style="list-style-type: none"> <li>➤ Participated in the preparation activities for the upcoming September Quarterly Meeting.</li> <li>➤ The following CM Enhancements/Research activities will be performed in the month of September:                             <ul style="list-style-type: none"> <li>○ CSPM-43163: Collaboration Model: Restrict the user to create multiple Redeterminations and Periodic reports associated with particular case number (Part 2)</li> <li>○ CSPM-67105: Research for CM Enhancement: Doc Upload Type Assistance</li> <li>○ CSPM-67149: Research for CM Enhancement: Application Status Tracker</li> <li>○ CSPM-67189: Research for CM Enhancement: Display Primary Applicant Status on a Case</li> </ul> </li> </ul>

**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:**
  - DWP 25.19: Monthly M&O Report – August 2023 on 09/11/23.

**1.2.2 Activities for the Next Reporting Period**

- **Deliverable and Work Product submissions for next reporting period:**
  - FWP 25.19: Monthly M&O Report – August 2023 on 09/21/23.

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### 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.
- Analyzed the Quarter 2 Prioritization Results for the seven (7) enhancements prioritized in the last CM survey which closed on 07/05/23.
- Logged Research Items/SCRs (Enhancements) based on the above analysis and prioritized them for upcoming months.
- Identified Collaboration Model priorities as enhancements versus action items to perform additional research.

The table below contains the 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-43163 (Enhancement)	Restrict the user to create multiple Redeterminations and Periodic reports associated with a particular case number	Design Update Needed	Design prototype options finalized. Recruitment In Progress for elaborative research session next week
CSPM-67119 (Enhancement)	Collaboration Model: Document Upload for Users with No Account	Design Update Needed	Design Update in Progress – Discussed in UCD Monthly Meeting, Awaiting Advocate feedback
CSPM-67105 (Research Item)	Research for CM Enhancement: Doc Upload Type Assistance	In Progress	Generative research conducted.
CSPM-67149 (Research Item)	Research for CM Enhancement: Application Status Tracker	In Progress	Started generative research with conducting focused group session with the users
CSPM-67189 (Enhancement)	Research for CM Enhancement: Display Primary Applicant Status on a Case	In Progress	Started working on the research item; User Recruitment in progress to conduct generative research
CSPM-67150 (Research Item)	Research for CM Enhancement: Authorized Representative	Not Started	Research Item logged from CM Q2 meeting in held in June 2023
CSPM-67104 (Research Item)	Research for CM Enhancement: Leverage Email Communications and Interactions	Not Started	Research Item logged from CM Q2 meeting in held in June 2023
CSPM-67600 (Research Item)	Research for CM Enhancement: Link to YouTube Videos on the dashboard and banner	Not Started	Research Item logged from CM Q2 meeting in held in June 2023

**Table 1.3-1 – Enhancements Updates, Prioritized by CM**

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### 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	October 2023
CSPM-43163 (Enhancement)	Restrict the user to create multiple Redeterminations and Periodic reports associated with a particular case number	Finish Recruitment & conduct elaborative research	October 2023
CSPM-67119 (Enhancement)	Collaboration Model: Document Upload for Users with No Account	Finish Design Update after incorporating Advocate Feedback	October 2023
CSPM-67105 (Research Item)	Research for CM Enhancement: Doc Upload Type Assistance	Continue with Research Activities	September 2023
CSPM-67149 (Research Item)	Research for CM Enhancement: Application Status Tracker	Continue with Research Activities	September 2023
CSPM-67189 (Enhancement)	Research for CM Enhancement: Display Primary Applicant Status on a Case	Continue with Research Activities	September 2023
CSPM-67150 (Research Item)	Research for CM Enhancement: Authorized Representative	N/A	October 2023
CSPM-67104 (Research Item)	Research for CM Enhancement: Leverage Email Communications and Interactions	N/A	November 2023
CSPM-67600 (Research Item)	Research for CM Enhancement: Link to YouTube Videos on the dashboard and banner	N/A	October 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 and Design Meetings**
  - Continued working with development and testing teams for the August 2023 enhancements.
  - Continued working with development and testing teams for the September 2023 enhancements.



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- Continued design work for the October 2023 enhancements.
- Continued working with the development and testing teams for Release 23.11.19 CalWORKs Time Clocks.
- Continued working with development and testing teams for SSA Application on BenefitsCal enhancement CSPM-65292.
- Hosted TNB4 Clarification meeting with CalSAWS on 09/11/23.
- Hosted Check-In with the CWDA on 09/11/23.
- Hosted the UCD Monthly Meeting with Advocates and State Partners on 09/12/23.
- Hosted a discussion regarding an option for users to remove a phone number from BenefitsCal on 09/13/23.
- Hosted a discussion regarding Anonymous Doc Upload with Hyland on 09/14/23.
- Hosted a TNB4 Recertification Inbound/Outbound Data Elements clarification meeting with CalSAWS on 09/14/23.
- Hosted the BenefitsCal Enhancement Pipeline Meeting on 09/15/23.

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

#### ➤ Designs and Design Meetings

- Continue working with development and testing teams for the August 2023 enhancements.
- Continue working with development and testing teams for the September 2023 enhancements.
- Continue design work for the October 2023 enhancements.
- Continue working with the development and testing teams for Release 23.11.19 CalWORKs Time Clocks.
- Continue working with development and testing teams for SSA Application on BenefitsCal enhancement CSPM-65292.
- Host Check-In with the CWDA on 09/18/23.

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

#### ➤ 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 09/11/23.
- Collaborate with the M&O team to prepare for the upcoming Quarterly Report due in October.
- Modified bi-monthly report template to enhance spacing and visual appeal.
- Created repository of monthly and quarterly data sources from latest report values.

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- Updated master data tracker with new file naming convention, slide mapping, data pull owners, etc.
- Created an index of data reports and data sources required for the bimonthly report creation.
- **User Engagement**
  - Participated in the Collaboration Model meetings during the week of 09/11/23 to include conversations regarding the September Quarterly Meetings.
  - Facilitated (3) generative/usability testing sessions for Anonymous Doc Upload during the week of 09/11/23.
  - Finalized development of the prototype and usability testing protocol for Anonymous Doc Upload during the week of 09/11/23.
  - Began development of the research and usability testing protocol as well as the prototype for the RE/SAR 7 application status tracker during the week of 09/11/23.
  - Began recruitment for the RE/SAR 7 application status tracker usability test sessions during the week of 09/11/23.
  - Visited the county of Alameda and provided onsite support to customers during Wave 5 implementation.
- **Enhancements**
  - Completed designs for Anonymous Doc Uploads during the week of 09/11/23.
  - Completed design updates to the Renewals and Periodic Reports (RE/SAR 7) trackers.
  - Updated screen designs to include the enablement of TNB4 on BenefitsCal.
- **Advocate Engagement**
  - Prepared and facilitated the CWDA weekly check-in meeting on 09/18/23.
  - Presented and facilitated at the UCD Monthly Prep and UCD Monthly Meeting on 09/18/23 and 09/20/23.
  - Sent out the Anonymous Document Upload materials for Advocate review on 09/20/23.

### 2.1.4 Activities for the Next Reporting Period – UCD

- **CX Measurements Data**
  - 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 09/18/23.
  - Collaborate with the M&O team to prepare for the upcoming Quarterly Report due in October.
  - Pull monthly data metrics for the month of August by 09/20/23.

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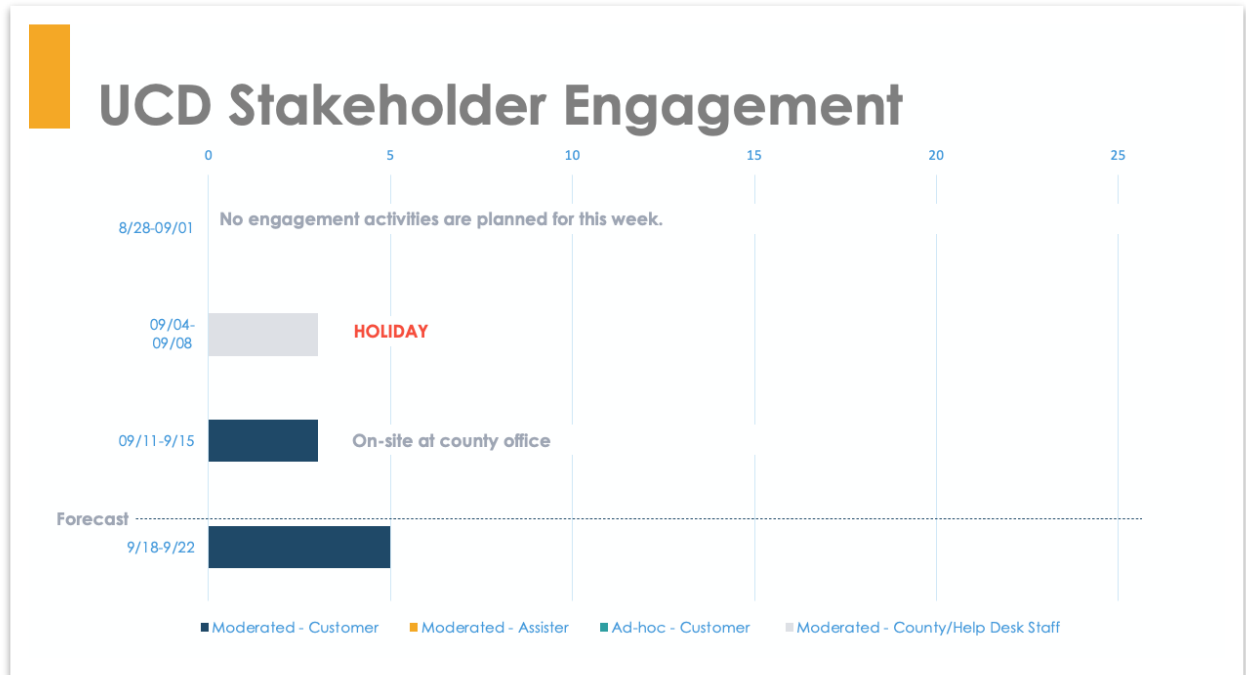
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- Update the reporting template based on guidelines for better visualization of data and content during the week of 09/18/23.
- Resume the creation of a detailed bi-monthly data analysis sheet with process documentation and hard coded formulas for chart generation.
- **User Engagement**
  - Synthesize research & usability testing insights for the Anonymous Document Upload enhancement during the week of 09/18/23.
  - Finalize development of the research and usability testing protocol as well as the prototype for the RE/SAR 7 application status tracker during the week of 09/18/23.
  - Facilitate 5–7 evaluative research and usability testing sessions for the RE/SAR7 application status tracker during the week of 09/18/23.
- **Enhancements**
  - Finalize designs for the Anonymous Doc Upload enhancement during the week of 09/04/23.
  - Finalize designs for the Anonymous Document Upload enhancement during the week of 09/18/23 based on customer and stakeholder feedback.
  - Finalize designs for the RE/SAR 7 Application Status Tracker enhancement during the week of 09/18/23 based on customer and stakeholder feedback.
- **Advocate Engagement**
  - Prepare and facilitate the CWDA weekly check-in meeting on 09/18/23.
  - Meet for the CM September Quarterly meeting on 09/20/23.
  - Respond to comments received from the Advocates for the Anonymous Doc Upload during the week of 09/18/23.

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**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 09/15/23	Actual for Week Ending 09/15/23	Total Planned for the Release	Comments
23.09.24	3	3	3	CSPM-61588: CalSAWS has fixed the issue at their end. This is planned to be deployed to production on 23.09.24.
23.09.28	2	5	7	CSPM-67106 is marked "Cancelled" and therefore removed from the list.

**Table 2.2-1 – Enhancement Actuals for Reporting Period**

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### 2.2.2 Activities for the Next Reporting Period – Development

#### Enhancements (M&E)

Release	Planned for Week Ending 09/22/23	Total Planned for the Release	Total Completed for the Release	Comments
23.09.24	3	3	3	CSPM-61588: CalSAWS has fixed the issue at their end. This is planned to be deployed to production on 23.09.24.
23.09.28	2	7	5	CSPM-67106 is marked "Cancelled" and therefore removed from the list.

Table 2.2-2 – Planned Enhancement Work

#### Unscheduled Release Updates

##### ➤ Chatbot

- For the 25 issues that we have reported earlier related to Currency Slot and Custom Slot for Chinese, Japanese, and Korean languages, the Amazon Web Services (AWS) team is updating the Language model at their end and the provided ETA for those fixes is June 2023 – Awaiting response from AWS team. Post the confirmation from AWS will decide on next steps.
- The Amazon Web Services (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 – Awaiting response from the AWS team. After confirmation from AWS, next steps will be defined.
- POC for chatbot is completed and CSPM-65313 is planned for September release.

##### ➤ Time Clock

- Planned for Go-Live in November and System Test to be started on 09/18/23.

### 2.3 System Test Execution

#### 2.3.1 Highlights of the Reporting Period – System Test Execution

##### ➤ Release 23.09.24 – September Baseline Release

- QA and the Consortium are testing the tickets.
- Deploying the fix for appointment time format.

##### ➤ Release 23.09.28 – September Monthly Release

- Continued validating the September Monthly Release Tickets and coordinate with the partners for any end-to-end validation.

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### 2.4 Activities for the Next Reporting Period – System Test Execution

- **Release 23.09.28 – September Monthly Release**
  - Continue validating the September Monthly Release Tickets and co-ordinate with the partners for any end-to-end validation.
- **Release 23.09.24 - September Baseline Release**
  - Deploy the Release into PRD on 09/24/23.

### 2.5 User Acceptance Test (UAT) Planning

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

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

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

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

## 3.0 Performance Test

### 3.1 Highlights of the Reporting Period – Performance Test

- **Release 23.09.24 – September Baseline Release**
  - The BenefitsCal performance testing team completed the document upload script changes for the September release enhancements and executed one (1) round of performance testing with the CalSAWS environment. Regarding the development of the new TNB4 script, the team is waiting for UAT fixes and final build to be deployed in the PERF environment early next week. The first-round test results look comparable in terms of average response time and errors and the data setup after the CalSAWS database refresh activity was validated successfully. The detailed jMeter report is uploaded to the CalSAWS SharePoint for further review and feedback.
- **Release 23.09.24 – September Baseline Release**
  - Continue working on the September baseline release enhancements performance testing activities and execute isolated performance tests with the CalSAWS environment as per the laid-out plan.

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Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	08/21/23	09/20/23	Release 23.09.24 – September Baseline Release	<b>Scope:</b> Four (4) BenefitsCal enhancements for September release requires updates to existing six (6) Document upload scripts and develop a new Redet TNB4 script. <b>Executions:</b> BenefitsCal isolated performance tests leveraging Partners Perf infra. Tuesday, 09/12/23 Monday, 09/18/23 Wednesday, 09/20/23	65%

Table 3.1-1 – 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**
  - No comments for this reporting period.

#### 4.1.2 Activities for the Next Reporting Period – User Conversion Testing

- **Perform CBO User Data Validation**
  - Continue preparation of Wave 6 CBO users.

### 4.2 Security

#### 4.2.1 Highlights of the Reporting Period – Security

- **SAST**
  - 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 09/15/23.

#### 4.2.2 Activities for the Next Reporting Period – Security

- **Identified Vulnerabilities**
  - 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).

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### ➤ AWS SSO for BenefitsCal

- 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
None for the reporting period.						

**Table 6.1-1 – Deliverable Status for Current Reporting Period**

#### Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
None for the reporting period.			

**Table 6.1-2 – Upcoming Deliverable Deadlines**



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**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
24.19	CX Report – June/July 2023	08/11/23	08/23/23	08/30/23
25.19	Monthly M&O Report – August 2023	09/11/23	09/21/23	09/28/23
28.17	BenefitsCal Work Plan Monthly Updates – August 2023	N/A	09/08/23	09/19/23
29.17	BenefitsCal Monthly Status Report – August 2023	N/A	09/08/23	09/19/23

**Table 6.1-3 – Upcoming Work Product Deadlines**

**Upcoming Work Product Deadlines**

WP #	Work Product Name	Status	Next Deadline
25.19	Monthly M&O Report – August 2023	On Track	DWP submitted 09/11/23 FWP submission 09/21/23 FWP approval 09/28/23
28.17	BenefitsCal Work Plan Monthly Updates – August 2023	On Track	FWP submitted 09/08/23 FWP approval 09/19/23
29.17	BenefitsCal Monthly Status Report – August 2023	On Track	FWP submitted 09/08/23 FWP approval 09/19/23

**Table 6.1-4 – Upcoming Work Product Deadlines**

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**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	<p>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.</p> <p>Status Updates:</p> <p>September 2, 2022:</p> <ul style="list-style-type: none"> <li>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</li> </ul> <p>September 30, 2022:</p> <ul style="list-style-type: none"> <li>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.</li> </ul> <p>January 6, 2023:</p> <ul style="list-style-type: none"> <li>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, CWDA and Consortium will</li> </ul>	Open	Low	Medium	05/10/21

**CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report**

Weekly Status Report, September 20, 2023

Period: September 11, 2023 to September 17, 2023

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>provide direction on the implementation schedule.</p> <p>January 11, 2023:</p> <ul style="list-style-type: none"> <li>• Prioritization is requested by end of month so it can be incorporated into the roadmap</li> </ul> <p>February 2, 2023:</p> <ul style="list-style-type: none"> <li>• 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.</li> </ul> <p>February 3, 2023:</p> <ul style="list-style-type: none"> <li>• 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.</li> </ul> <p>March 3, 2023:</p> <ul style="list-style-type: none"> <li>• 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</li> </ul> <p>April 7, 2023</p> <ul style="list-style-type: none"> <li>• 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</li> </ul> <p>April 28, 2023:</p> <ul style="list-style-type: none"> <li>• 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 SCERFRA approval for SCERFRA 23-512, CDSS is also confirming the funding source to establish a</li> </ul>				

**CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report**

Weekly Status Report, September 20, 2023

Period: September 11, 2023 to September 17, 2023

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>roadmap for implementation. Next meeting is scheduled on 05/03/23</p> <p>June 2, 2023:</p> <ul style="list-style-type: none"> <li>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.</li> </ul> <p>June 9, 2023:</p> <ul style="list-style-type: none"> <li>BenefitsCal and CalSAWS teams connected with ODI on Friday 06/09/23. Next steps identified for ODI to provide the raw data from GCF to begin the analysis.</li> </ul> <p>June 30, 2023:</p> <ul style="list-style-type: none"> <li>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.</li> </ul> <p>July 28, 2023:</p> <ul style="list-style-type: none"> <li>A working session is scheduled for 08/02/23 to talk about SCERFRA 23-500, SCERFRA 23-512 (SSA flow) and CF 303 – Benefit Replacement with CDSS, CWDA, Consortium and CalSAWS.</li> </ul>				
290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties	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	Open	Medium	High	05/19/23

**CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report**

Weekly Status Report, September 20, 2023

Period: September 11, 2023 to September 17, 2023

ID	Title	Details	Status	Risk Level	Severity	Date Logged
	and customers	<p>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.</p> <p>June 16, 2023:</p> <ul style="list-style-type: none"> <li>Responded to SIRFRA 1270/1271 regarding Expanding the Release of Information Feature with set of questions to DHCS from BenefitsCal, CalSAWS, and CWDA on 06/12/23.</li> </ul> <p>June 30, 2023:</p> <ul style="list-style-type: none"> <li>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.</li> </ul> <p>July 28, 2023:</p> <ul style="list-style-type: none"> <li>Workgroup member names are being collected including representatives from CDSS, DHCS, OSI, CWDA, Counties, Advocates and CalSAWS. Draft topics are also being reviewed, Preliminary categories including, Policy Guidance Considerations/ Questions, Processes, System Functionality/Automation.</li> </ul>				

**CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report**

Weekly Status Report, September 20, 2023

Period: September 11, 2023 to September 17, 2023

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		Meeting Schedule and cadence is in progress				

**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
0329-23	PPOCs (All); IPOCs (All); Regional Managers (All)	BenefitsCal Communication and Marketing Materials-Awareness Toolkit 2023	CalSAWS M&E	09/12/23	Carlos Zepeda	Marsale Eramya

**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
None for the reporting period							

**Table 6.3-2 – CRFIs**

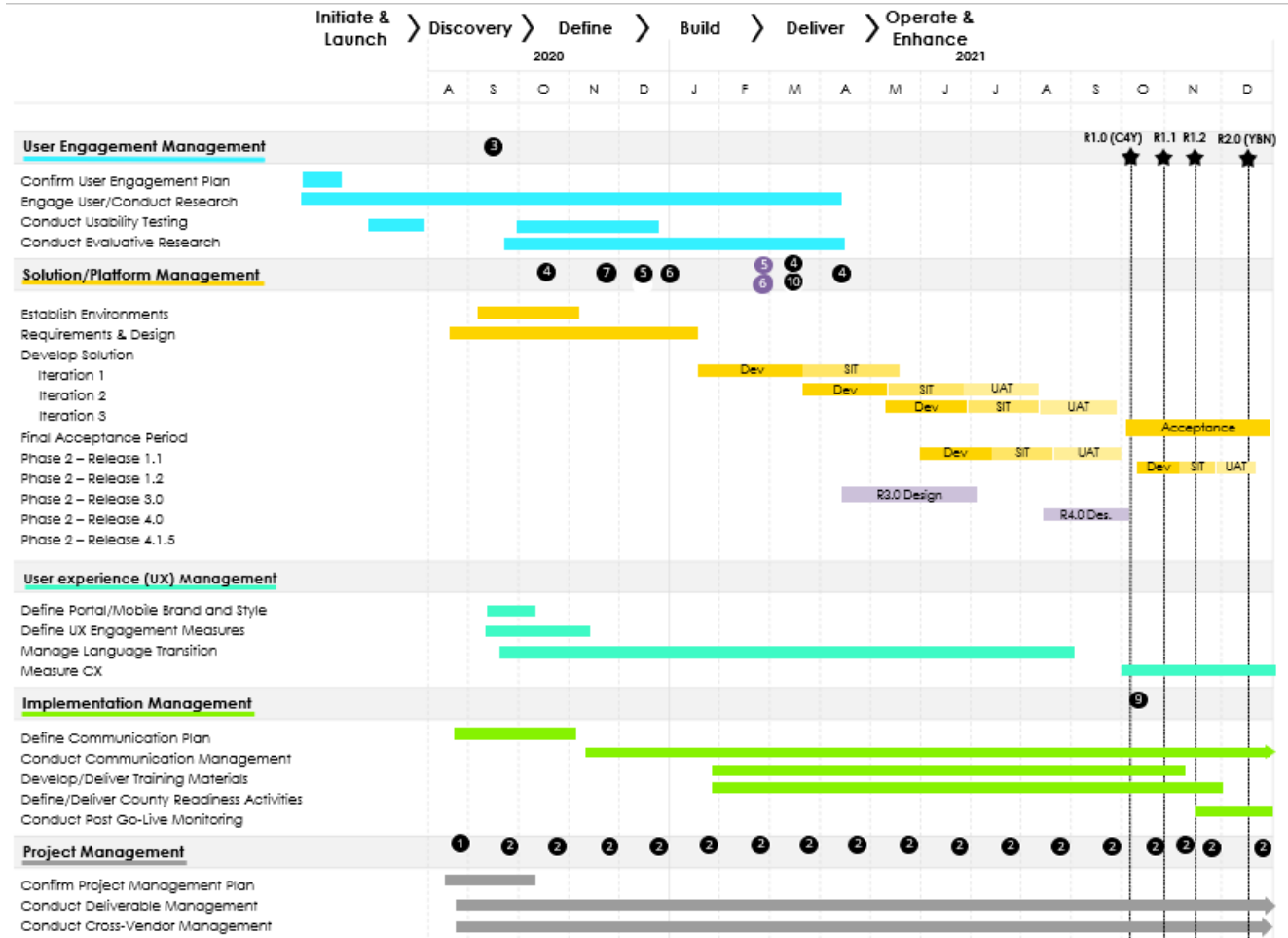
# CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

Weekly Status Report, September 20, 2023

Period: September 11, 2023 to September 17, 2023

## 6.4 Appendix C – Project Work Plan Reports

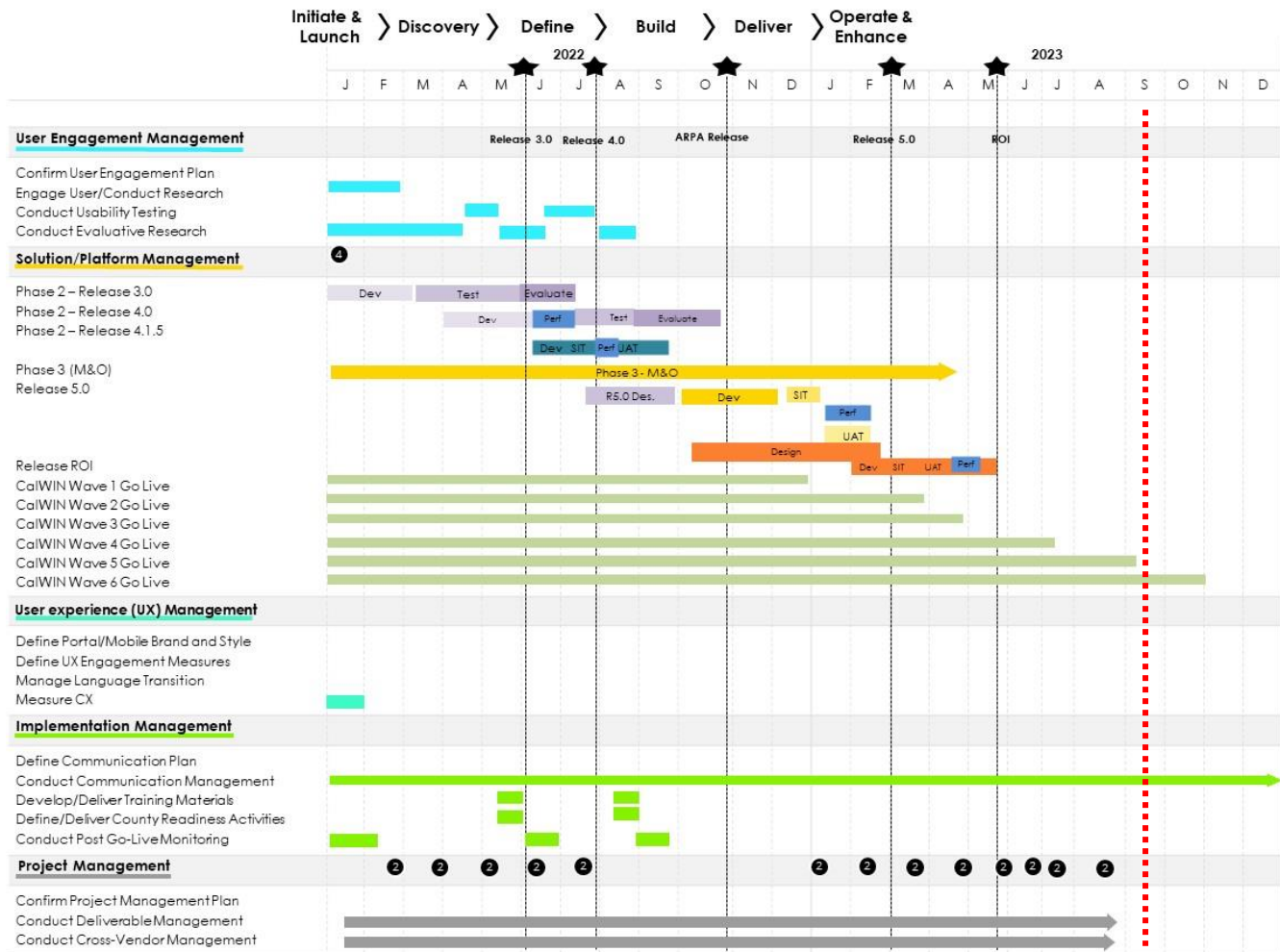
### Project Timeline



# CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

Weekly Status Report, September 20, 2023

Period: September 11, 2023 to September 17, 2023



## 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