# CalSAWS BenefitsCal (Portal/Mobile) Weekly Status Report

**Reporting Period: September 18, 2023 to September 24, 2023**

09/27/23

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# 1.0 Project Management

## 1.1 Executive Summary

| STATUS REPORT SUBSECTION | STATUS AGENDA TOPIC |
|---|---|
| September Enhancements | ➢ One (1) enhancement was delivered with the 23.09.24 Release (Aligned with CalSAWS Baseline Release 23.09):<br>o One (1) Partner Support Enhancement (CSPM-61588)<br>➢ Six (6) enhancements will be delivered with the 23.09.28 Release (Regular BenefitsCal Release):<br>o Four (4) Production Priority Enhancements<br>o Two (2) Policy Enhancements |
| CalWIN Implementation Support Services (ISS) Support | **Wave 5**<br>➢ Maintenance & Operations (M&O) service management is in progress.<br>➢ Health Metrics generation is in progress.<br>**Wave 6**<br>➢ Email-1 campaign distribution preparation is in progress.<br>o Distribution date: 09/28/2023.<br>➢ Tier-1 staff training completed for the following:<br>o Sacramento County + 55 supported counties completed on 09/19/23<br>o San Francisco County + 55 supported counties completed on 09/21/23<br>o The following Tier-1 staff training and CBO awareness training are scheduled,<br>o San Luis Obispo County + 55 supported counties: 09/26/23<br>o CBO awareness training scheduled: 09/28/23<br>➢ The CBO user conversion mock-run is complete, and the exception report has been generated. No exceptions were identified. |
| UCD Activities | **Customer Experience (CX) Measurements Data**<br>➢ Modified bimonthly report template to enhance spacing and visual appeal.<br>➢ Created repository of monthly and quarterly data sources from latest report values.<br>➢ Updated master data tracker with new file naming convention, slide mapping, data pull owners, etc.<br>➢ Created index of data reports and data sources required for bi-monthly report creation. |

| STATUS REPORT SUBSECTION | STATUS AGENDA TOPIC |
|---|---|
| | ➢ Monitored the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues.<br>➢ Collaborate with the M&O team to prepare for the upcoming Quarterly Report due in October.<br>➢ Modified bi-monthly report template to enhance spacing and visual appeal.<br>➢ Created repository of monthly and quarterly data sources from latest report values.<br>➢ Updated master data tracker with new file naming convention, slide mapping, data pull owners, etc.<br>➢ Created an index of data reports and data sources required for the bimonthly report creation.<br>**User Engagement**<br>➢ Facilitated five (5) customer Generative Research and Usability Testing sessions application/RE/SAR 7 Tracker.<br>➢ Conducted research customer interview sessions for the document type enhancement.<br>➢ Conducted research customer interview for the application status tracker enhancement.<br>➢ Conducted research focus group sessions for county staff for the application status tracker.<br>**Enhancements**<br>➢ Began updates to CSPM-67119 (Anon Doc Upload) based on Advocate feedback and customer UT feedback but paused pending updates from Consortium Security next week.<br>➢ Synthesized insights for the research and usability testing sessions for Document-related items.<br>➢ Finalized designs for CSPM-43163 (RE/SAR 7 Tracker).<br>➢ Synthesized insights for usability testing sessions for the RE/SAR 7 Tracker.<br>➢ Finalized screen updates for TNB4 (CSPM-65407).<br>➢ Finalized design updates the application status tracker.<br>**Advocate Engagement**<br>➢ Participated in the Collaboration Model Quarter Meeting for Stakeholders.<br>➢ Participated in the Collaboration Model Quarter Meeting for Advocates.<br>➢ Prepared and facilitated the CWDA weekly check-in meeting on 09/18/23. |

| STATUS REPORT SUBSECTION | STATUS AGENDA TOPIC |
|---|---|
| Communication and Marketing Campaign Phase 2 | ➢ Metrics reporting has begun and will continue<br>➢ Prepared metrics report for BenefitsCal Team leadership and Consortium<br>➢ Prepared zip files and uploaded to BenefitsCal Advocate web portal for Advocate Co Leads<br>➢ Revised brochure with requested corrections<br>➢ Coordinated brochure translations with vendor, and internal teams<br>➢ Prepared emails for Consortium to share with stakeholder groups<br>➢ Met with Consortium for weekly marketing team review (Lynn attended) |
| Collaboration Model | ➢ Participated in the September Quarterly Meeting.<br>➢ The following CM Enhancements/Research activities will be performed in the month of October:<br>o CSPM-43163: Collaboration Model: Restrict the user to create multiple Redeterminations and Periodic reports associated with particular case number (Part 2).<br>o CSPM-67150: Identify user journeys and research Authorized representative user type in BenefitsCal.<br>o CSPM-67600: Update location of where YouTube Videos are located. |

**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:**
  - FWP 25.19: Monthly M&O Report – August 2023 on 09/21/23.

### 1.2.2 Activities for the Next Reporting Period

- **Deliverable and Work Product submissions for next reporting period:**
  - None for the reporting period.

## 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 is in progress. |
| CSPM-43163 (Enhancement) | Restrict the user to create multiple Redeterminations and Periodic reports associated with a particular case number | Analysis In Progress | Conducted elaborative research session with the users.<br>Performed Research Synthesis & Finalized Design.<br>Ready for Development. |
| CSPM-67119 (Enhancement) | Collaboration Model: Document Upload for Users with No Account | Design Update Needed | Consortium Security team highlighted some concerns with the proposed design.<br>Conducted brainstorming session with CalSAWS, Hyland, Imaging Team to address security concerns with implementation of a new API endpoint in CalSAWS.<br>Awaiting CalSAWS confirmation on revised timeline. |
| CSPM-67105 (Research Item) | Research for CM Enhancement: Doc Upload Type Assistance | In Progress | Conducted generative research with the users. |
| CSPM-67149 (Research Item) | Research for CM Enhancement: Application Status Tracker | In Progress | Continued 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 | User Recruitment done; Generative research to be conducted next week |
| CSPM-67150 (Research Item) | Research for CM Enhancement: Authorized Representative | Not Started | Research Item logged from CM Q2 meeting in held in June 2023 |

| ID | Summary | Status | Update this Week |
|---|---|---|---|
| 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**

### 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 | Start Implementation based on finalized design | October 2023 |
| CSPM-67119 (Enhancement) | Collaboration Model: Document Upload for Users with No Account | Coordinate with CalSAWS to finalize the revised timeline | November 2023 (TBD) |
| CSPM-67105 (Research Item) | Research for CM Enhancement: Doc Upload Type Assistance | Perform Research Synthesis & log an SCR based on the outcome. Close Research Item. | September 2023 |
| CSPM-67149 (Research Item) | Research for CM Enhancement: Application Status Tracker | Perform Research Synthesis & log an SCR based on the outcome. Close Research Item. | 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 September 2023 enhancements.
  - 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 the Social Security Administration (SSA) Application on BenefitsCal enhancement CSPM-65292.
  - Hosted Customer Engagement Funding Discussion on 09/18/23.
  - Attended GCF Parity List Funding Discussion Hosted by CDSS on 09/19/23.
  - Attended SSA/GCF BenefitsCal Portal Changes Discussion on 09/19/23.
  - Attended App Dev Meeting Hosted by Consortium 09/19/23.
  - Attended BenefitsCal GCF Touchpoint Hosted by CDSS on 09/19/23.
  - Attended CAPI Workgroup Hosted by CDSS on 09/19/23.
  - Attended Virtual Greenlight Meeting for County Validation on 09/20/23.
  - Attended Renewal Due Date Discussion Hosted by CalSAWS on 09/21/23.
  - Hosted Anonymous Document Upload Security Call on 09/21/23.
  - Co-Hosted SSP Committee Prep Meeting on 09/21/23.

### 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 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 09/25/23.
  - Co-host SCERFRA Touchpoint with CalSAWS to discuss weekly SCERFRA updates on 09/27/23.

- Host ABAWD Phased Approach Meeting on 09/27/23.
- Host BenefitsCal Enhancement Pipeline Discussion on 09/29/23.

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

- **Customer Experience (CX) Measurements Data**
  - Modified bi-monthly report template to enhance spacing and visual appeal.
  - Created repository of monthly and quarterly data sources from latest report values.
  - Updated master data tracker with new file naming convention, slide mapping, data pull owners, etc.
  - Created index of data reports and data sources required for bi-monthly report creation.
  - Monitored the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues.
  - Collaborated with the M&O team to prepare for the upcoming Quarterly Report due in October.
  - Modified the bi-monthly report template to enhance spacing and visual appeal.
  - Created repository of monthly and quarterly data sources from latest report values.
  - 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**
  - Facilitated five (5) customer Generative Research and Usability Testing sessions application/RE/SAR 7 Tracker.
  - Conducted research customer interview sessions for the document type enhancement.
  - Conducted research customer interview for the application status tracker enhancement.
  - Conducted research focus group sessions for county staff for the application status tracker.
- **Enhancements**
  - Began updates to CSPM-67119 (Anon Doc Upload) based on Advocate feedback and customer UT feedback but paused pending updates from Consortium Security next week.
  - Synthesized insights for the research and usability testing sessions for Document-related items.
  - Finalized designs for CSPM-43163 (RE/SAR7 Tracker).
  - Synthesized insights for usability testing sessions for the RE/SAR 7 Tracker.

- Finalized screen updates for TNB4 (CSPM-65407).
- Finalized design updates the application status tracker.

➢ **Advocate Engagement**

- Participated in the Collaboration Model Quarter Meeting for Stakeholders
- Participated in the Collaboration Model Quarter Meeting for Advocates.
- Prepared and facilitated the CWDA weekly check-in meeting on 09/18/23.

### 2.1.4 Activities for the Next Reporting Period – UCD – during the week of 09/25/23.

➢ **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.
- 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.
- Update the reporting template based on guidelines for better visualization of data and content.
- Resume the creation of a detailed bi-monthly data analysis sheet with process documentation and hard coded formulas for chart generation.

➢ **User Engagement**

- Facilitation of 3-5 research and usability testing "combo" sessions document-related items.
- Finalize synthesis of the application tracker enhancement.
- Finalize synthesis on document type data insights.
- Plan and recruit for primary applicant focus groups.
- Conduct primary applicant focus groups
- Synthesize primary applicant focus group insights and data.

➢ **Enhancements**

- Finalize designs for the Anonymous Doc Upload enhancement.
- Begin design development on upcoming November enhancements.
- Finalize document type design updates.

➢ **Advocate Engagement**

- Respond to stakeholder comments on Anonymous Document Upload.
- Prepare and facilitate the CWDA weekly check-in meeting on 09/25/23.

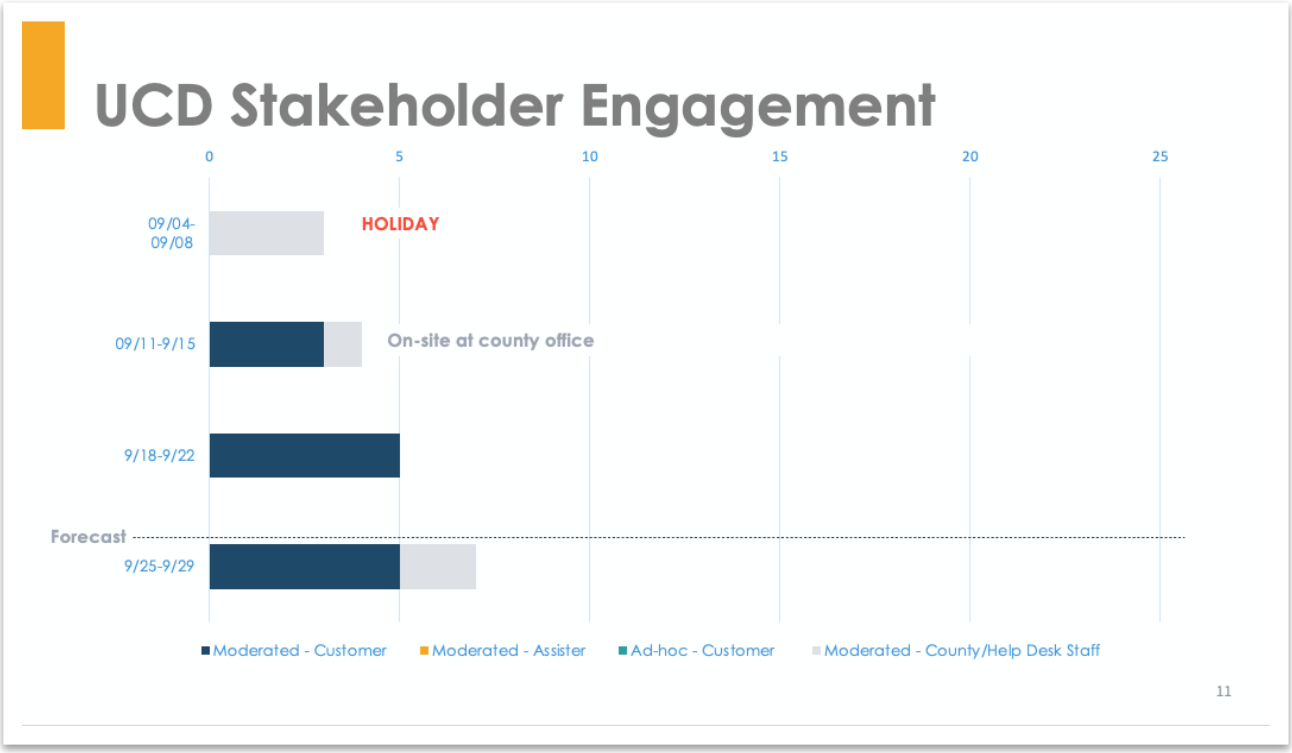



**Figure 2.1-1 – UCD Stakeholder Engagement**

## 2.2 Development

### 2.2.1 Highlights of the Reporting Period – Development

**Enhancements (M&E)**

| Release | Planned for Week Ending 09/22/23 | Actual for Week Ending 09/22/23 | Total Planned for the Release | Comments |
|---|---|---|---|---|
| 23.09.24 | 3 | 3 | 3 | Release 23.09.24 was deployed to Production on 09/23/24. |
| 23.09.28 | 1 | 6 | 7 | |

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

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

**Enhancements (M&E)**

| Release | Planned for Week Ending 09/29/23 | Total Planned for the Release | Total Completed for the Release | Comments |
|---|---|---|---|---|
| 23.09.24 | 3 | 3 | 3 | Release 23.09.24 was deployed to production on 09/23/24. |
| 23.09.28 | 1 | 7 | 6 | |

**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.
  - Point of Contact (POC) for chatbot is completed and CSPM-65313 is planned for September release.
- **Time Clock**
  - Go-live for Time clock to be finalized in the coming weeks

## 2.3 System Test Execution

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

- **Release 23.09.24 – September Baseline Release**
  - The September Baseline Release was deployed into PRDSTG on 09/20/2023. All the validations were completed on STG.
- **Release 23.09.28 – September Monthly Release**
  - Continued validating the September Monthly Release Tickets and coordinated with the partners for any end-to-end validation.

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

- **Release 23.09.28 – September Monthly Release**
  - Deploy the Release into STG on 09/25/23.
  - Deploy the Release into PRD on 09/28/23.
- **Release 23.09.24 - September Baseline Release**
  - Deploy the Release into PRD on 09/24/23.
- **Release 23.10.19 - October Monthly Release**
  - Deploy the first build into SIT on 09/26/23. Co-ordinate with the partners for any E2E tickets.

### 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 scripts changes and development of the new script for TNB4 scenario for the September release enhancements. The team successfully executed two (2) rounds of performance tests with the CalSAWS environment. The test results look comparable in terms of average response time and errors. No performance issues were observed related to the release. The detailed jMeter reports are uploaded to the CalSAWS SharePoint for further review and feedback.

| 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 | **Scope:** Four (4) BenefitsCal enhancements for September release requires updates to existing six (6) Document upload scripts and develop a new Redet TNB4 script.<br>**Executions:** BenefitsCal isolated performance tests leveraging Partners Perf infra.<br>Tuesday, 09/12/23<br>Monday, 09/18/23<br>Wednesday, 09/20/23 | 100% |

**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**
  - None 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 09/22/23.

### 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).

- **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**

### 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 | 08/24/23 | 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<br>FWP submitted 09/21/23<br>FWP approval 09/28/23 |
| 28.17 | BenefitsCal Work Plan Monthly Updates – August 2023 | On Track | FWP submitted 09/08/23<br>FWP approval 09/19/23 |
| 29.17 | BenefitsCal Monthly Status Report – August 2023 | On Track | FWP submitted 09/08/23<br>FWP approval 09/19/23 |

**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.<br>Status Updates:<br>September 2, 2022:<br>• 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<br>September 30, 2022:<br>• 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.<br>January 6, 2023:<br>• 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 | Open | Low | Medium | 05/10/21 |

| ID | Title | Details | Status | Risk Level | Severity | Date Logged |
|---|---|---|---|---|---|---|
| | | provide direction on the implementation schedule.<br>January 11, 2023:<br>• Prioritization is requested by end of month so it can be incorporated into the roadmap<br>February 2, 2023:<br>• 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.<br>February 3, 2023:<br>• 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.<br>March 3, 2023:<br>• 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<br>April 7, 2023<br>• 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<br>April 28, 2023:<br>• 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 | | | | |

| ID | Title | Details | Status | Risk Level | Severity | Date Logged |
|---|---|---|---|---|---|---|
| | | roadmap for implementation. Next meeting is scheduled on 05/03/23<br>June 2, 2023:<br>• 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.<br>June 9, 2023:<br>• 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.<br>June 30, 2023:<br>• 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.<br>July 28, 2023:<br>• 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.<br>September 1, 2023:<br>• Multiple working sessions have been facilitated by CDSS with participation by CWDA, Consortium, BenefitsCal, and CalSAWS. Since August 02, 2023, Out of 26 items, 4 items have been closed, 4 items are in-plan. 9 items are awaiting confirmation/ response by CDSS and another 9 | | | | |

| ID | Title | Details | Status | Risk Level | Severity | Date Logged |
|---|---|---|---|---|---|---|
| | | are scheduled to be discussed with CDSS during the next working session on September 06, 2023. In plan items include the SSA Application flow in BenefitsCal, design activities for SCERFRA 23-512 (SSA flow) is on track to be completed by 09/08/23.<br>September 8, 2023:<br>• Working session facilitated by CDSS with participation by CWDA, Consortium, BenefitsCal and CalSAWS on 09/06/23. CDSS is going to provide offline response for the remaining items. Next working session is schedule on 10/04/23. Also working with ODI on recommender widget analysis. Next meeting is on 09/12/23. | | | | |
| 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 | Open | Medium | High | 05/19/23 |

| ID | Title | Details | Status | Risk Level | Severity | Date Logged |
|---|---|---|---|---|---|---|
| | | CDSS and DHCS and there is operational clarity agreed to by all parties.<br>June 16, 2023:<br>• 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.<br>June 30, 2023:<br>• 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.<br>July 28, 2023:<br>• 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. Meeting Schedule and cadence is in progress.<br>September 1, 2023:<br>• Kickoff meeting conducted during the week of 8/14. Primary objective was the member introductions and review of the agenda topics, gathering topics for upcoming meetings in the areas of Policy, Processes and Automation. Next meeting is scheduled on 9/11 as a working session | | | | |

**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 for the reporting period | | | | | | |

**Table 6.3-1 – CITs**

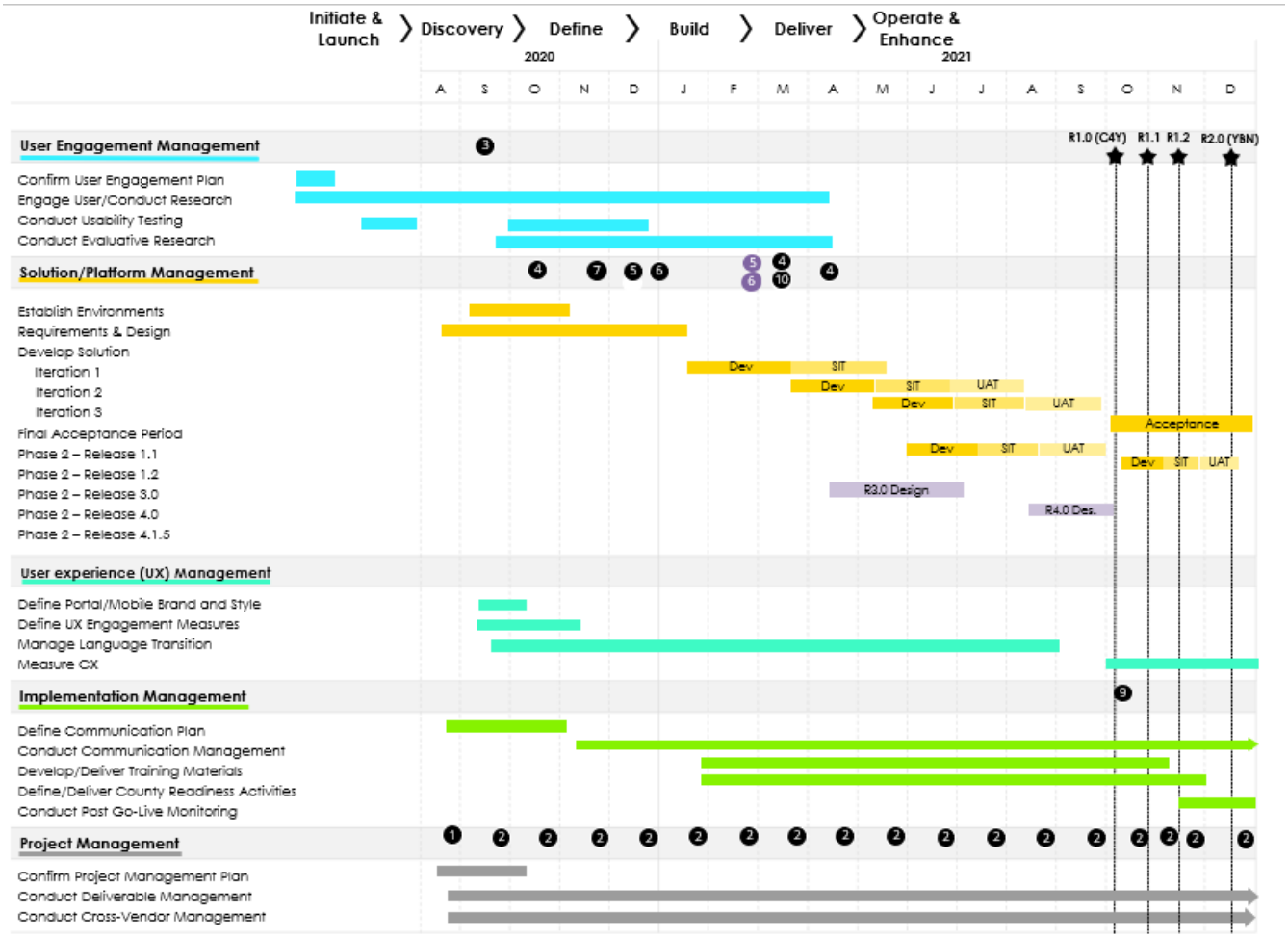
The following table outlines CalSAWS Requests for Information (CRFIs) sent for the reporting period.

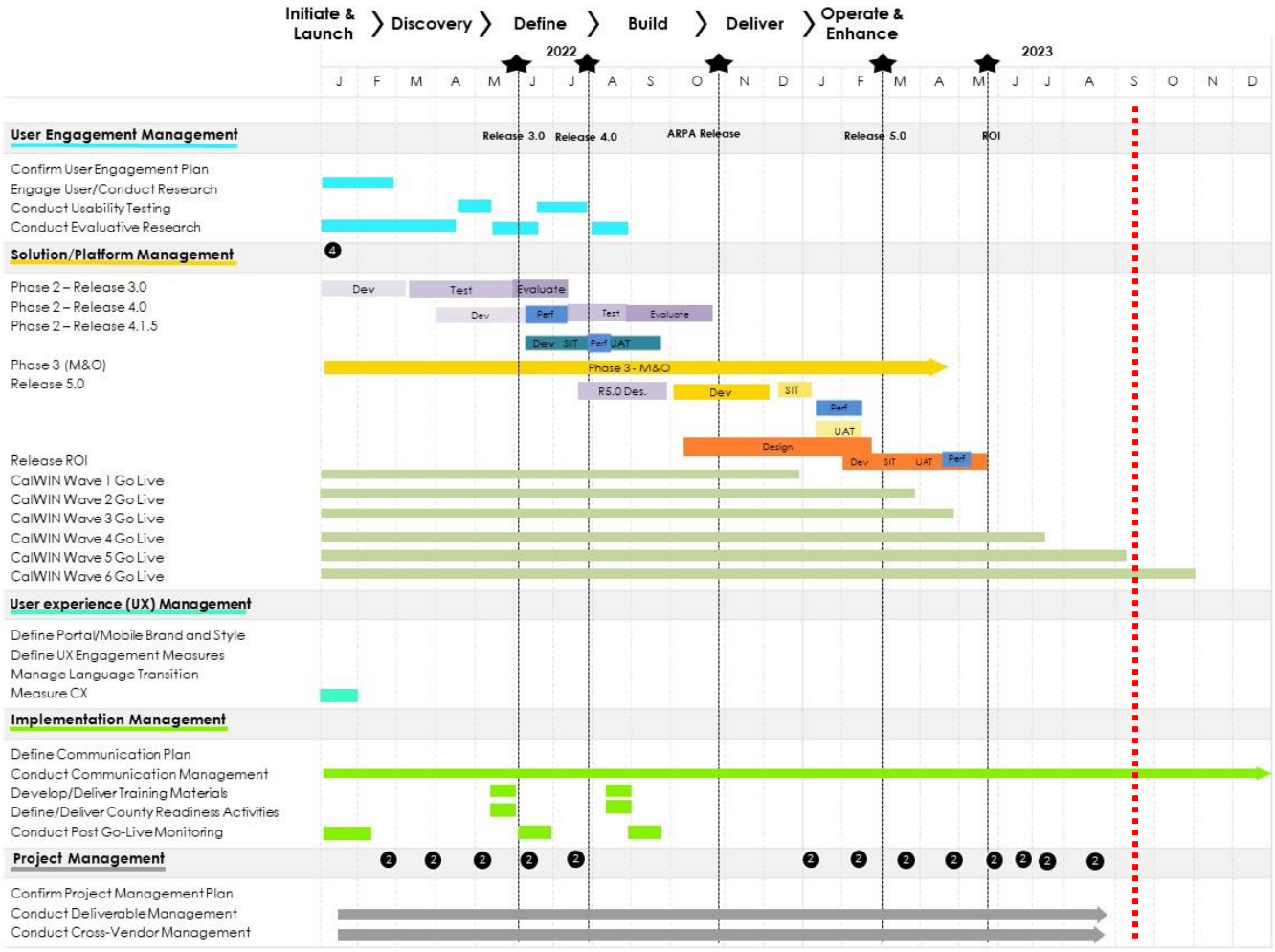
| CRFI ID | To | Subject | Distribution Date | Status | Response Due Date | Primary BenefitsCal Contact | Backup BenefitsCal Contact |
|---|---|---|---|---|---|---|---|
| None for the reporting period | | | | | | | |

**Table 6.3-2 – CRFIs**

## 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**