CalSAWS BenefitsCal (Portal/Mobile) Weekly Status Report

Reporting Period: October 9, 2023 to October 15, 2023

Table of Contents

1.0 Project Management 4
1.1 Executive Summary 4
1.2 PMO 6
1.2.1 Highlights of the Reporting Period 6
1.2.2 Activities for the Next Reporting Period 6
1.3 BenefitsCal Collaboration Model (CM) 6
1.3.1 Highlights of the Reporting Period 6
1.3.2 Activities for the Next Reporting Period 7
2.0 Application Development and Test 8
2.1 Requirements and Design 8
2.1.1 Highlights of the Reporting Period – Requirements and Design 8
2.1.2 Activities for the Next Reporting Period – Requirements and Design 8
2.1.3 Highlights of the Reporting Period – User Centered Design (UCD) 9
2.1.4 Activities for the Next Reporting Period – UCD – during the week of 10/16/23. 10
2.2 Development 11
2.2.1 Highlights of the Reporting Period – Development 11
2.2.2 Activities for the Next Reporting Period – Development 12
2.3 System Test Execution 12
2.3.1 Highlights of the Reporting Period – System Test Execution 12
2.4 Activities for the Next Reporting Period – System Test Execution 13
2.5 User Acceptance Test (UAT) Planning 13
2.5.1 Highlights of the Reporting Period – User Acceptance Test Planning 13
2.5.2 Activities for the Next Reporting Period – User Acceptance Test Planning 13
3.0 Performance Test 13
3.1 Highlights of the Reporting Period – Performance Test 13

4.0 Security 14
4.1 User Conversion 14
4.1.1 Highlights of the Reporting Period – User Conversion Testing 14
4.1.2 Activities for the Next Reporting Period – User Conversion Testing 14
4.2 Security 14
4.2.1 Highlights of the Reporting Period – Security 14
4.2.2 Activities for the Next Reporting Period – Security 14
5.0 Communications and Training 15
5.1 Highlights of the Reporting Period 15
5.2 Activities for the Next Reporting Period 15
6.0 Appendices 15
6.1 Appendix A – Deliverable Summary 15
6.2 Appendix B – Risks and Issues Summary 17
6.3 CRFI/CIT/CalSAWS CR Communications Information 22
6.4 Appendix C – Project Work Plan Reports 23

1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
October Enhancements	➢ Nine (9) enhancements will be delivered with the October Release 23.10.19: o One (1) Collaboration Enhancement o One (1) Partner Support Enhancement o Two (2) Production Priority Enhancements o Two (2) Policy Enhancement o Three (3) Technical Enhancements
CalWIN Implementation Support Services (ISS) Support	**Wave 5** ➢ Maintenance & Operations (M&O) service management is in progress. ➢ Health Metrics generation is in progress. **Wave 6** ➢ Email-2 campaign was launched on 10/12/23. o Total emails distributed: 57,177 ▪ Sacramento: 41,107 ▪ San Francisco: 15,501 ▪ San Luis Obispo: 569 ➢ SMS-1 campaign was launched on 10/13/23. o Total emails distributed: 57,507 ▪ Sacramento: 41,925 ▪ San Francisco: 15,190 ▪ San Luis Obispo: 392 ➢ Email-3 and SMS-2 campaign launch preparation is in progress. ➢ The Community Based Organization (CBO) user conversion mock-run is complete, and the exception report has been generated. No exceptions were identified. ➢ Production data extract for the CBOs is complete. County review is in progress.
User Centered Design (UCD) 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. ➢ Continued working on the upcoming Quarterly Report due in October.

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	User Engagement ➢ Facilitated one (1) County Staff focus group for Authorized Representative. ➢ Facilitate two (2) CBO focus groups for Authorized Representative. ➢ Sent out over 130 emails to customers from the list of Medallia volunteers. ➢ Conducted one (1) Customer Interview for Authorized Representative. ➢ Facilitated one (1) Eligibility SME interview for Authorized Representative research activity. **Enhancements** ➢ Facilitated research for Authorized Representative research (CSPM-67150). ➢ Completed design development on next phase of Chatbot Expansion (CSPM-66583). **Advocate Engagement** ➢ UCD Month Meeting is scheduled on 10/18/23. ➢ Finalized deck for the next UCD Monthly Meeting (Chatbot expansion and Time Clocks).
GetCalFresh (GCF) Parity List	➢ Next GCF Parity list meeting is scheduled on 11/01/23. ➢ BenefitsCal responses for parity list SCERFRA 23-500 for tracking IDs 9, 19, 20, 31, and 63 were provided to the CDSS on 09/22/23. ➢ Another working session is facilitated on 10/04/23 with participation from the CWDA, the Consortium, BenefitsCal, and CalSAWS. One (1) item is resolved, and eight (8) items are remaining where the CDSS and CFA are to provide confirmation to finalize.
Collaboration Model	➢ Next Collaboration Model meeting is scheduled for 12/01/23. ➢ The following CM Enhancements/Research activities will be performed in the month of October: o CSPM-43163: Collaboration Model: Restrict the user to create multiple Redeterminations and Periodic reports associated with particular case number (Part 2). o CSPM-67150: Identify user journeys and research Authorized representative user type in BenefitsCal. 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:**
  - DWP 24.20: CX Report – Aug/Sept 2023 on 10/13/23.
  - DWP 25.20: Monthly M&O Report – September 2023 on 10/10/23.

1.2.2 Activities for the Next Reporting Period

- **Deliverable and Work Product submissions for next reporting period:**
  - FWP 25.20: Monthly M&O Report – September 2023 on 10/19/23.

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.
- 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	Ready for UAT Deployment	Finished Development & Testing, awaiting Deployment to UAT.
CSPM-67119 (Enhancement)	Collaboration Model: Document Upload for Users with No Account	Design Update Needed	Confirmation received from CalSAWS to implement this in November 2023. This will introduce a new API endpoint hosted by CalSAWS to validate DOB (entered by the customer without an account during doc upload flow) with household members in CalSAWS.

ID	Summary	Status	Update this Week
			Received API Swagger from CalSAWS.
CSPM-67150 (Research Item)	Research for CM Enhancement: Authorized Representative	In Progress	Started working on the script for generative research. User Recruitment In Progress. Couple of Focused Group sessions conducted.
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.
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-67189 (Enhancement)	Research for CM Enhancement: Display Primary Applicant Status on a Case	Not Started	Generative Research planned in November 2023.
CSPM-67785	Collaboration Model: Update Document Type/ Upload feature	Prioritization Needed	Enhancement created as an outcome of the research CSPM-67105
CSPM-67761	Collaboration Model: Update Application and RE/SAR7 Status Tracker	Prioritization Needed	Enhancement created as an outcome of the research CSPM-67149

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	Provide support to QA/Consortium Test teams; Deploy to Production	October 2023
CSPM-67119 (Enhancement)	Collaboration Model: Document Upload for Users with No Account	Begin Development	November 2023
CSPM-67150 (Research Item)	Research for CM Enhancement: Authorized Representative	Continue with generative research recruitment and focused group sessions	October 2023

ID	Summary	Activity for Next Week	Target Delivery Date
CSPM-67600 (Research Item)	Research for CM Enhancement: Link to YouTube Videos on the dashboard and banner	Create Research plan	October 2023
CSPM-67104 (Research Item)	Research for CM Enhancement: Leverage Email Communications and Interactions	N/A	November 2023
CSPM-67189 (Enhancement)	Research for CM Enhancement: Display Primary Applicant Status on a Case	N/A	November 2023
CSPM-67785 (Enhancement)	Collaboration Model: Update Document Type/ Upload feature	Prioritize for Future Release	December 2023
CSPM-67761 (Enhancement)	Collaboration Model: Update Application and RE/SAR7 Status Tracker	Prioritize for Future Release	December 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 October 2023.
  - Continued design work for the November 2023 enhancements.
  - Continued working with the development and testing teams for the Release 23.11.19 CalWORKs Time Clocks enhancement.
  - Continued working with development and testing teams for the Social Security Administration (SSA) Application on BenefitsCal enhancement CSPM-65292.
  - Hosted GCF Parity Release Planning Meeting with CalSAWS on 10/09/23.
  - Attended Coronavirus Food Assistance Program (CFAP) Expansion Meeting hosted by the California Department of Social Services (CDSS) on 10/10/23.
  - Hosted BenefitsCal Enhancement Pipeline Discussion on 10/13/23.
  - Attended App Status Update for Office Mapping Meeting with CalSAWS on 10/13/23.

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 October 2023.
  - Continue design work for the November 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 UCD Monthly Prep Meeting on 10/16/23.
- Host Discussion on Case Link and Unlink on 10/16/23.
- Host BenefitsCal CWDA Check In on 10/16/23.
- Attend ABAWD Time Limit Rule Discussion Hosted by CDSS on 10/17/23.
- Attend App Dev Meeting Hosted by the Consortium on 10/17/23.
- Attend BenefitsCal and GetCalFresh (GCF) Touchpoint Hosted by CDSS on 10/17/23.
- Attend CAPI Workgroup Hosted by CDSS on 10/17/23.
- Co-Host SCERFRA Touchpoint with CalSAWS 10/18/23.
- Host UCD Monthly Meeting with Advocates and State Partners on 10/18/23.
- Attend CM Enhancement Request Flow Meeting Hosted by QA on 10/19/23.

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.
  - Collaborated with the M&O team to prepare for the upcoming Quarterly Report due in October.
  - Updated the reporting template based on guidelines for better visualization of data and content.
  - Resumed the creation of a detailed bi-monthly data analysis sheet with process documentation and hard coded formulas for chart generation.
- **User Engagement**
  - Facilitated one (1) County Staff focus group for Authorized Representative.
  - Facilitated two (2) CBO focus groups for Authorized Representative.
  - Sent out over 130 emails to customers from the list of Medallia volunteers.
  - Conducted one (1) Customer Interview for Authorized Representative.
  - Facilitated one (1) Eligibility SME interview for Authorized Representative research activity.
- **Enhancements**
  - Facilitated and conducted generative research for Authorized Representative.
  - Finished design development on Chatbot Expansion (CSPM-66583).

- **Advocate Engagement**
  - Finished deck for UCD Monthly Meeting (Chatbot expansion and Time Clocks).

2.1.4 Activities for the Next Reporting Period – UCD – during the week of 10/16/23.

- **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.
  - 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**
  - Synthesis five (5) research sessions for Authorized Representative.
  - Conduct more secondary research for Authorized Representative.
  - Recruit more customers for 1:1 research activities for Authorized Representative.
  - Plan research for YouTube Video Link (SCR CSPM-67103).
- **Enhancements**
  - Synthesize on Authorized Representative research.
  - Continue Generative Research on Authorized Representative.
  - Plan for YouTube Video Link (SCR CSPM-67103).
- **Advocate Engagement**
  - Facilitate and gather advocate feedback from UCD Monthly Meeting (Chatbot expansion and Time Clocks).

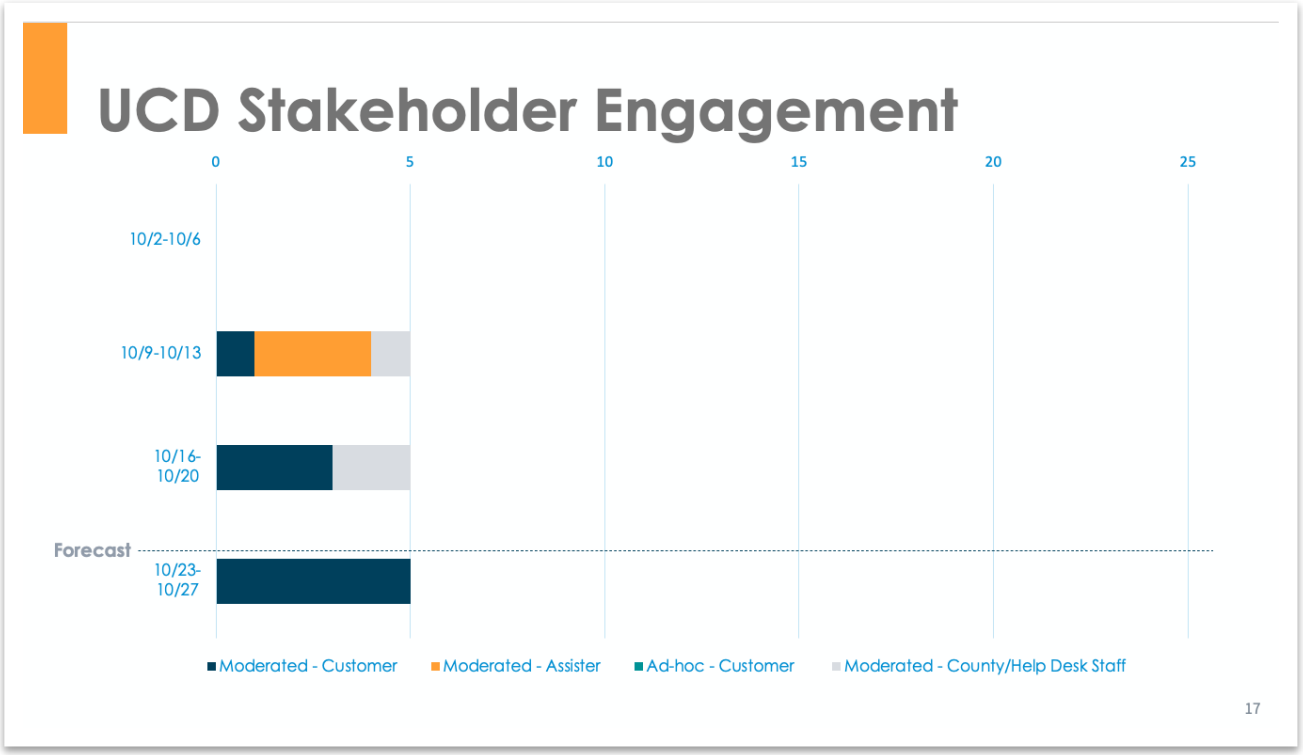


Figure 2.1-1 – UCD Stakeholder Engagement

2.2 Development

2.2.1 Highlights of the Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 10/13/23	Actual for Week Ending 10/13/23	Total Planned for the Release	Comments
23.10.19	5	5	9	
23.10.30	1	1	1	CalWIN Wave 6 release planned for 10/30/23.
23.11.30	0	0	5	

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 10/20/23	Total Planned for the Release	Total Completed for the Release	Comments
23.10.19	5	9	9	
23.10.30	1	1	1	CalWIN Wave 6 release planned for 10/30/23.
23.11.30	1	5	0	Release 23.11.30 is planned for 11/30/23

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 an ETA for those fixes was June 2023 – awaiting response from AWS team. After the confirmation from AWS, the BenefitsCal Team 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, the BenefitsCal Team will define the next steps.
  - Support for additional languages Korean, Japanese and Chinese is still not released by AWS. The next update is expected by January 2024.
- **Time Clock**
  - Go-Live for the Time Clock enhancements to be finalized in the coming weeks.

2.3 System Test Execution

2.3.1 Highlights of the Reporting Period – System Test Execution

- **Release 23.10.19 – October Monthly Release**
  - Continued validating all other tagged tickets to October. Co-ordinated with the partners for E2E tickets.

2.4 Activities for the Next Reporting Period – System Test Execution

- **Release 23.10.19 – October Monthly Release**
  - Continue validating all tickets for October. Coordinate with the partners for any E2E tickets. Deploy October Code into PRDSTG on 10/17/23 and on PRD on 10/19/23.

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 23.10.19– October Monthly Release**
  - The BenefitsCal team deployed the latest October release build with office mapping API functional bug fixes to Perf environment on Friday, 10/13/23. The performance testing team started the entire suite scripts and partner data validations and identified several data related issues causing many scripts failures. BenefitsCal team will work with CalSAWS to resolve these data related issues and attempt another test on Monday, 10/16. Additionally, we will also prepare for the Mock services test in case the CalSAWS environment isn't available.

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. **Executions:** BenefitsCal isolated performance tests leveraging Partners Perf infra. Tuesday, 09/12/23 Wednesday, 09/20/23	100%

Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	09/25/23	10/17/23	Release 23.10.19 – October Monthly Release	**Scope:** Three (3) BenefitsCal enhancements for October release requires 1 new inbound API script development and potentially minor updates to existing scripts. **Executions:** BenefitsCal isolated performance tests plan: Friday, 10/13/23 Monday, 10/16/23	60%

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**
  - Generated the Wave 6 CBO User listing and handed them off to the Wave 6 Counties for their validation activities prior to using the list for the Wave 6 Cutover.

4.1.2 Activities for the Next Reporting Period – User Conversion Testing

- **Perform CBO User Data Validation**
  - Review the Wave 6 County updates to the CBO user listing.

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 10/13/23.

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 and Training

5.1 Highlights of the Reporting Period

- Send email 2 to the Wave 6 customers on 10/12/23.
- Send SMS 1 communications to the Wave 6 customers on 10/13/23.

5.2 Activities for the Next Reporting Period

- No activities for the 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
24.20	CX Report – August/September 2023	10/13/23	10/25/23	11/01/23
25.20	Monthly M&O Report – September 2023	10/10/23	10/19/23	10/26/23
26.07	BOM Review and License Renewals	N/A	10/05/23	10/18/23
27.07	Certificate Review	N/A	10/05/23	10/18/23
28.18	BenefitsCal Work Plan Monthly Updates – September 2023	N/A	10/06/23	10/16/23
29.17	BenefitsCal Monthly Status Report – August 2023	N/A	09/08/23	09/19/23
29.18	BenefitsCal Monthly Status Report – September 2023	N/A	10/06/23	10/16/23

Table 6.1-3 – Upcoming Work Product Deadlines

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
24.20	CX Report – Aug/Sept 2023	On Track	DWP submitted 10/13/23 FWP submission 10/25/23 FWP approval 11/01/23
25.20	Monthly M&O Report – September 2023	On Track	DWP submitted 10/10/23 FWP submission 10/19/23 FWP approval 10/26/23
26.06	BOM Review and License Renewals	On Track	FWP submitted 10/06/23 FWP approval 10/17/23
26.06	Certificate Review	On Track	FWP submitted 10/06/23 FWP approval 10/17/23
28.18	BenefitsCal Work Plan Monthly Updates – September 2023	On Track	FWP submitted 10/06/23 FWP approval 10/17/23
29.18	BenefitsCal Monthly Status Report – September 2023	On Track	FWP submitted 10/06/23 FWP approval 10/17/23

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. 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. 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 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. 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 9, 2023: • 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. 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. July 28, 2023: • 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. September 1, 2023: • 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. September 8, 2023: • 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. October 6, 2023: • Participated in sessions facilitated by CDSS on 09/19/23, with participation from CWDA, Consortium and BenefitsCal for parity list. BenefitsCal responses for parity list SCERFRA 23-500 for tracking IDs 9, 19, 20, 31, 63 are provided to CDSS on 09/22. Another working session is facilitated on 10/04/23 with participation from CWDA, Consortium, BenefitsCal and CalSAWS. 1 item is resolved, and 8 items are remaining where CDSS and CFA to provide confirmation to finalize.				
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	Open	Medium	High	05/19/23

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		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 16, 2023: • 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. 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. July 28, 2023: • 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. September 1, 2023: • Kickoff meeting conducted during the week of 8/14. Primary objective was the member introductions and review of the				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		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. September 22, 2023: • ROI Workgroup met on Sept 11 and Sept 18, 2023. Group discussed policy questions and clarifications. Next meeting scheduled for Oct 2, 2023, to discuss draft applicant/recipient roles/responsibilities (e.g., Authorized Representatives, Power of Attorney, CBOs, etc.) September 29, 2023: • ROI Workgroup met on Sept 11 and Sept 18, 2023. Group discussed policy questions and clarifications. Next meeting scheduled for Oct 2, 2023, to discuss draft applicant/recipient roles/responsibilities (e.g., Authorized Representatives, Power of Attorney, CBOs, etc.)				

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

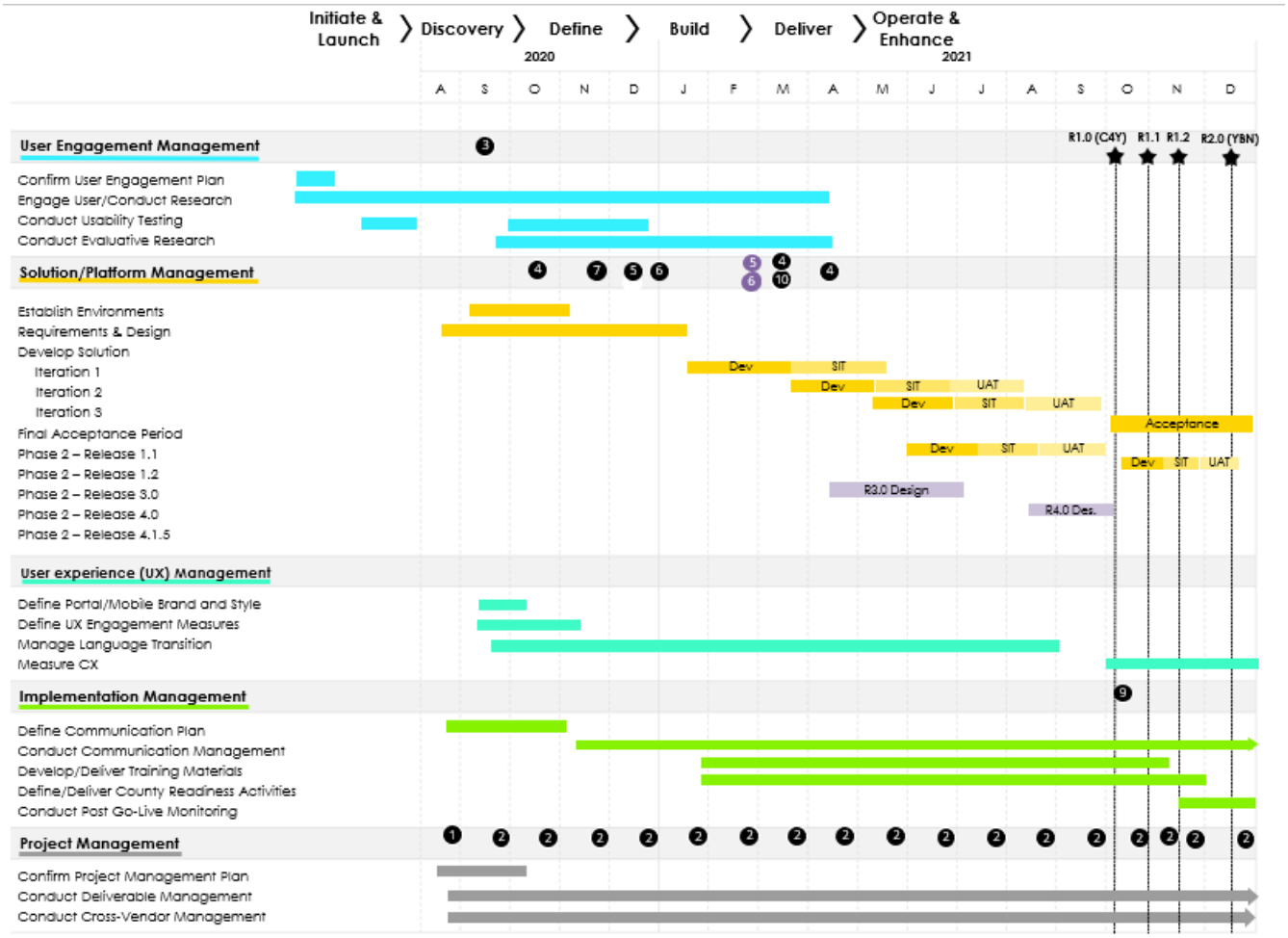
The following table outlines CalSAWS Requests for Information (CRFIs) sent for the reporting period.

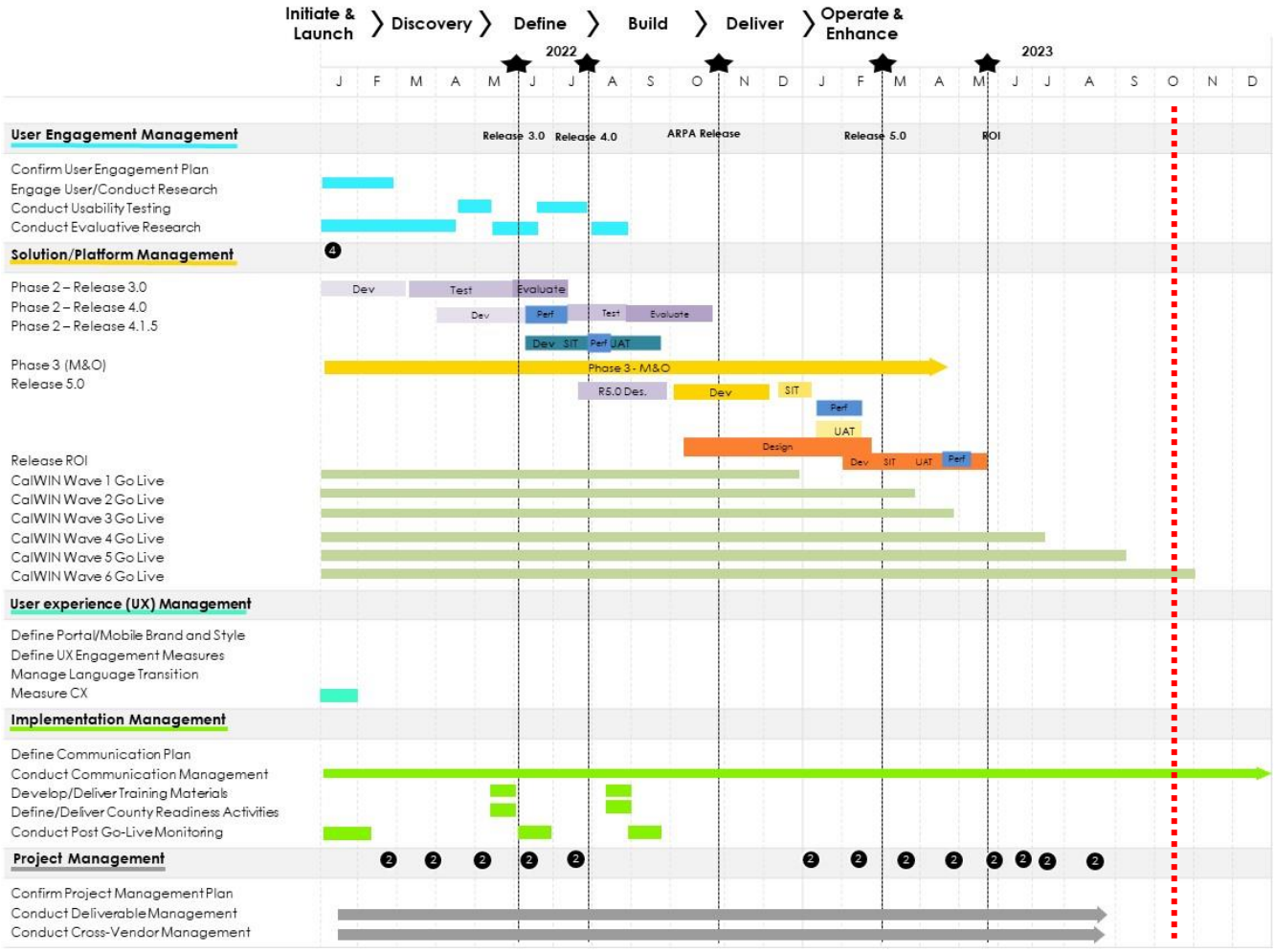
CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary BenefitsCal Contact	Backup BenefitsCal Contact
None for the reporting period							

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