CalSAWS BenefitsCal (Portal/Mobile) Weekly Status Report

Reporting Period: October 16, 2023 to October 22, 2023

10/25/23

Table of Contents

1.0 Project Management

1.1   Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC

October Enhancements	➢ Nine (9) enhancements were delivered to Production 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 Enhancements
	    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-3 campaign was launched on 10/19/23.
	    o Total emails delivered: 12,506
	        ▪ Sacramento: 9,059
	        ▪ San Francisco: 2,743
	        ▪ San Luis Obispo: 704
	➢ SMS-2 campaign was launched on 10/20/23.
	    o Total SMS delivered: 58,098
	        ▪ Sacramento: 42,332
	        ▪ San Francisco: 15,373
	        ▪ San Luis Obispo: 393
	➢ Email-4 campaign launch preparation is in progress.
	➢ QA and Consortium review of the production ticket is complete, and approval received.
	➢ The Community Based Organization (CBO) user conversion mock-run is complete, and the exception report has been generated. No exceptions were identified.
	➢ Production CBO conversion listing is finalized after county review.

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.

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	➢ Continued working on the upcoming Quarterly Report due in October.
	User Engagement
	➢ Facilitated one (1) County Staff focus group for Authorized Representative.
	➢ Synthesized over 100+ quantitative data points for Authorized Representative research.
	➢ Finalized the discussion guide for the YouTube video links.
	➢ Finalized the discussion guide for chatbot language review.
	➢ Sent out over 30 recruitment emails to customers for YouTube video links and chatbot language review.
	Enhancements
	➢ Synthesized research findings for Authorized Representative (CSPM-67150).
	➢ Synthesized generative research for Authorized Representative.
	➢ Finished design development on Chatbot Expansion (CSPM-66583).
	➢ Planned and started recruitment for YouTube video links.
	➢ Planned and started recruitment for chatbot language review.
	Advocate Engagement
	➢ Reviewed deck for UCD Monthly Meeting (Chatbot Expansion and Time Clocks) with CWDA, DHCS, CDSS.
	➢ Facilitated UCD monthly meeting.
	➢ Sent out materials for review for Chatbot Expansion enhancement.
GetCalFresh (GCF) Parity List	➢ Next GCF parity list meeting is scheduled for 11/01/23.
	➢ During the recent working session facilitated on 10/04/23 with participation from the CWDA, the Consortium, BenefitsCal, and CalSAWS, one (1) item was resolved, and eight (8) items remain 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 are being performed in the month of October:
	○ CSPM-43163: Collaboration Model: Restrict the user to create multiple Redeterminations and Periodic reports associated with particular case number (Part 2) - Delivered to PRD on 10/19/23.
	○ CSPM-67150: Identify user journeys and research Authorized representative user type in BenefitsCal – In Progress; ETA: 10/31/23
	○ CSPM-67600: Update location of where YouTube videos are located – In Progress; ETA: 10/31/23

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2 PMO

1.2.1 Highlights of the Reporting Period

➢ **Deliverables and Work Products submitted:**
   o FWP 25.20: Monthly M&O Report – September 2023 on 10/19/23.

1.2.2 Activities for the Next Reporting Period

➢ **Deliverable and Work Product submissions for next reporting period:**
   o FWP 24.20: CX Report – Aug/Sept 2023 on 10/25/23.

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 3 Prioritization Results for the ten (10) enhancements prioritized in the last CM survey.
➢ 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	On Hold	Research on hold.
CSPM-43163 (Enhancement)	Restrict the user to create multiple Redeterminations and Periodic reports associated with a particular case number	Closed	Deployed to Production
CSPM-67119 (Enhancement)	Collaboration Model: Document Upload for Users with No Account	Analysis In Progress	Design Updates Completed; Analysis In Progress
CSPM-67150 (Research Item)	Research for CM Enhancement: Authorized Representative	In Progress	Finalized 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	Started working on the script for generative research. User Recruitment In Progress.
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.

ID	Summary	Status	Update this Week
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/SAR 7 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-67119 (Enhancement)	Collaboration Model: Document Upload for Users with No Account	Continue with the Development	November 2023
CSPM-67150 (Research Item)	Research for CM Enhancement: Authorized Representative	Continue with generative research recruitment and focused group sessions	October 2023
CSPM-67600 (Research Item)	Research for CM Enhancement: Link to YouTube Videos on the dashboard and banner	Continue with generative research recruitment and focused group sessions	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**
  o Continued working with the development and testing teams for the October 2023 enhancements.
  o Continued design work for the November 2023 enhancements.
  o Continued working with the development and testing teams for the Release 23.11.19 CalWORKs Time Clocks enhancement.
  o Continued working with the development and testing teams for the Social Security Administration (SSA) Application on BenefitsCal enhancement CSPM-65292.
  o Hosted the UCD Monthly Prep Meeting on 10/16/23.
  o Hosted a discussion on Case Link and Unlink on 10/16/23.
  o Hosted a BenefitsCal County Welfare Directors Association (CWDA) Check-In on 10/16/23.
  o Attended the CWDA Medi-Cal Proposal Connect with CalSAWS and the Consortium on 10/16/23.
  o Attended the Able-Bodied Adults Without Dependents (ABAWD) Time Limit Rule discussion hosted by the California Department of Social Services (CDSS) on 10/17/23.
  o Attended the Estimates and Assumption Discussion for Medi-Cal and CalFresh Proposal hosted by CalSAWS on 10/17/23.
  o Attended the App Dev Meeting hosted by the Consortium on 10/17/23.
  o Attended the BC and GCF Touchpoint hosted by CDSS on 10/17/23.
  o Attended the Cash Assistance Program for Immigrants (CAPI) Workgroup hosted by CDSS on 10/17/23.
  o Hosted the Electronic Benefits Transfer (EBT) 2259 Discussion with CalSAWS on 10/17/23.
  o Co-Hosted the SCERFRA Touchpoint with CalSAWS on 10/18/23.
  o Attended the App Status Update Design Discussion hosted by CalSAWS on 10/18/23.
  o Hosted the UCD Monthly Meeting with Advocates and State Partners on 10/18/23.
  o Attended the CM Enhancement Request Flow Meeting hosted by QA on 10/19/23.

2.1.2   Activities for the Next Reporting Period – Requirements and Design

➢ **Designs and Design Meetings**
  o Continue working with the development and testing teams for the October 2023 enhancements.
  o Continue design work for the November 2023 enhancements.
  o Continue working with the development and testing teams for Release 23.11.19 CalWORKs Time Clocks.
  o Continue working with the development and testing teams for SSA Application on BenefitsCal enhancement CSPM-65292.
  o Host the BenefitsCal CWDA Check-In on 10/23/23.
  o Attend the App Dev Meeting on 10/24/23.
  o Attend California Food Assistance Program (CFAP) Expansion Meeting on 10/24/23.
  o Co-Host the SCERFRA Touchpoint with CalSAWS on 10/25/23.
  o Attend the Termination Reasons Discussion hosted by CalSAWS 10/26/23.
  o Host the BenefitsCal Pipeline Discussion on 10/27/23.

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

➢ **Customer Experience (CX) Measurements Data**
  o Monitored the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues.
  o Collaborated with the M&O team to prepare for the upcoming Quarterly Report due in October.
  o Resumed the creation of a detailed bi-monthly data analysis sheet with process documentation and hard coded formulas for chart generation.

➢ **User Engagement**
  o Facilitated one (1) County Staff focus group for Authorized Representative.
  o Synthesized six (6) generative research sessions for Authorized Representative.
  o Finalized discussion guide for the YouTube video links.
  o Finalized discussion guide for the chatbot language review.
  o Sent out over 30 emails to recruit customers for YouTube video links and chatbot language review.

➢ **Enhancements**
  o Synthesized generative research for Authorized Representative.
  o Finished design development on Chatbot Expansion (CSPM-66583).
  o Planned and started recruitment for YouTube video links.
  o Planned and started recruitment for chatbot language review.

➢ **Advocate Engagement**
  o Reviewed the presentation for UCD Monthly Meeting (Chatbot expansion and Time Clocks) with the CWDA, Department of Health Care Services (DHCS), and CDSS.
  o Facilitated UCD monthly meeting.
  o Sent out materials for review for the Chatbot Expansion enhancement.

2.1.4 Activities for the Next Reporting Period – UCD

➢ **CX Measurements Data**
  o Monitor the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues.
  o Collaborate with the M&O team to prepare for the upcoming Quarterly Report due in October.
  o Update the reporting template based on guidelines for better visualization of data and content.
  o Resume the creation of a detailed bi-monthly data analysis sheet with process documentation and hard coded formulas for chart generation.

➢ **User Engagement**
  o Recruit more Customers for 1:1 research activities for Authorized Representative.
  o Recruit more Customers for 1:1 research activities for YouTube video links.
  o Conduct research with Customers for YouTube Video Link (SCR CSPM-67103).
  o Conduct research with Customers for Chatbot language review.
  o Conduct research with County Staff members for YouTube Video Link (SCR CSPM-67103).

➢ **Enhancements**
  o Continue Generative Research on Authorized Representative.
  o Conduct generative research for YouTube Video Link (SCR CSPM-67103).
  o Conduct UT sessions with customers for chatbot language review.

➢ **Advocate Engagement**
  o None for the reporting period.

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 10/20/23	Actual for Week Ending 10/20/23	Total Planned for the Release	Comments
23.10.19	5	5	9	Release 23.10.19 was deployed to production on 10/19/23.
23.10.30	1	1	1	CalWIN Wave 6 release planned for 10/30/23.
23.11.30	1	1	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 10/27/23	Total Planned for the Release	Total Completed for the Release	Comments
23.10.19	5	5	9	Release 23.10.19 was deployed to production on 10/19/23.
23.10.30	1	1	1	CalWIN Wave 6 release planned for 10/30/23.
23.11.30	0	0	5	CSPM-66724 & CSPM-67119 are already in Development phase, but since the completion time is more there won't be any enhancement completed next week.

Table 2.2-2 – Planned Enhancement Work

Unscheduled Release Updates

➢ **Chatbot**
  o For the 25 issues that we have reported earlier related to Currency Slot and Custom Slot for Chinese, Japanese, and Korean languages, the 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.
  o 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.
  o Support for additional languages Korean, Japanese and Chinese is still not released by AWS. The next update is expected by January 2024.
➢ **Time Clock**
  o The Time Clock release is planned for a release in March 2024.
➢ **GCF-Parity**
  o Development for few items as part of GCF-Parity have been started from 10/16/23. (CSPM-4611, CSPM-67657, CSPM-67656) This is planned for January 2024.

2.3   System Test Execution

2.3.1   Highlights of the Reporting Period – System Test Execution

➤ **Release 23.10.19 – October Monthly Release**
  o Continued validating all tagged tickets for October. Co-ordinated with the partners for E2E tickets.
  o Deployed the October Release into Production on 10/19/23.

➤ **Release 23.11.30 – November Monthly Release**
  o Started validating tickets for November. Co-ordinated with the partners for E2E tickets.
  o Planned UAT build on 10/23/23.

2.4   Activities for the Next Reporting Period – System Test Execution

➤ **Release 23.11.30 – November Monthly Release**
  o Continue validating all tickets for November. Coordinate 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**
  o None for the period.

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

➤ **Test Support**
  o None for the period.

3.0 Performance Test

3.1   Highlights of the Reporting Period – Performance Test

➤ **Release 23.10.19– October Monthly Release**
  o The BenefitsCal team successfully executed two (2) rounds of isolated performance tests with the mock services. In the first test, the team identified the database contentions, CPU utilization reaching 95%, and the schedulers not processing the default office mapping records as expected. The overall average response time increased by 10% as well. The development, database, DevOps, and performance teams worked together to fix the database contention issues by applying the correct indexes to fine tune the update query processing default office mapping

records. Also, the scheduler tuning was done to process records within the set limit. The second set of test results were improved, observed optimized performance and results were comparable to the mock services test baseline. The detailed jMeter reports are uploaded to the CalSAWS SharePoint.

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%
13	09/25/23	10/18/23	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: Monday, 10/16/23 Wednesday, 10/18/23	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**
> o The review period has ended for the Wave 6 CBO User Listing. After finalizing, this will be handed off to the ForgeRock team for the Wave 6 Prod load.

4.1.2 Activities for the Next Reporting Period – User Conversion Testing

> **Perform CBO User Data Validation**
> o Finalize the Prod Wave 6 CBO User listing and hand off to ForgeRock Team

4.2   Security

4.2.1   Highlights of the Reporting Period – Security

➢ **SAST**
  o Executed the weekly Static Application Security Testing (SAST) of the application source code and shared the analysis of the security scan reports with the BenefitsCal Development Team for remediation on 10/20/23.

4.2.2   Activities for the Next Reporting Period – Security

➢ **Identified Vulnerabilities**
  o After the validation of the identified vulnerabilities, advise on the remediation activities to be performed by the BenefitsCal Development Team. Log defects in Jira for tracking purposes (weekly recurring activity).
➢ **AWS SSO for BenefitsCal**
  o Collaborate with the Consortium Security Team to update Amazon Web Services Single Sign-On (AWS SSO) users specific to BenefitsCal and facilitate onboarding and offboarding of AWS SSO for BenefitsCal users, as needed.

5.0 Communications and Training

5.1   Highlights of the Reporting Period

➢ The following CalWIN Wave 6 customer email and SMS campaigns were launched during the reporting period.

Communication Channel	Description	Distribution Dare	Status
Email 3	Email nudge to act on the unsubmitted applications in MyBCW.	10/19/23	Completed
SMS2	Information on upcoming transition.	10/20/23	Completed

5.2   Activities for the Next Reporting Period

➢ No activities for the reporting period.

6.0 Appendices

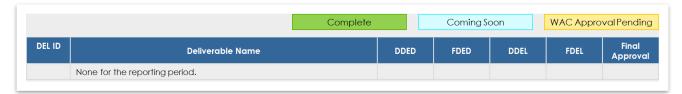## 6.1   Appendix A – Deliverable Summary

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
29.18	BenefitsCal Monthly Status Report – September 2023	N/A	10/06/23	10/16/23

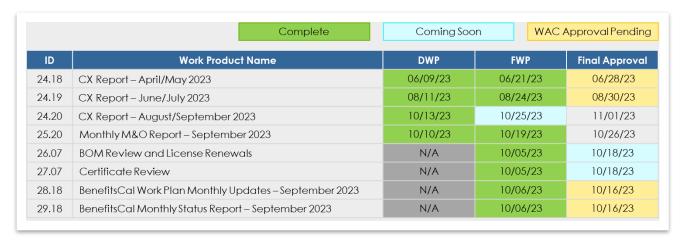**Table 6.1-3 – Upcoming Work Product Deadlines**

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

WP #	Work Product Name	Status	Next Deadline
25.20	Monthly M&O Report – September 2023	On Track	DWP submitted 10/10/23 FWP submitted 10/19/23 FWP approval 10/26/23

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. September 29, 2023: • Continue to participate in working sessions facilitated by CDSS with participation from CWDA, Consortium, BenefitsCal and CalSAWS. Project has provided revised estimate for 5 parity items on 9/22 via SCERFRA 23-500 that includes SSA Flow, CF-303 and three other changes. Next meeting with CDSS is scheduled for 10/4/2023 where 9 remaining items will be discussed. 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.				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers	Recently issued Release of Information (ROI) policy is not detailed enough, nor is it consistent between the two state Departments (CDSS and DHCS). The policy as written may create customer information privacy/security, safeguard and county operations concerns, and liabilities. As the policy was released after the completion of ROI design, development, and testing of the functionality in BenefitsCal and CalSAWS, counties have not had sufficient time to assess the ROI functionality with the high-level policy and to be able to determine impacts to their county operations and the associated alignment with the existing BenefitsCal/CalSAWS design. The policy as written does not give clear direction on County responsibilities associated with the establishment of CBO agreements, provisions of those agreements and monitoring of CBO compliance with the agreements. Counties also have not had sufficient time to be able to determine if their current CBO agreement language is adequate and includes provisions and protections to further protect customer information when being accessed by CBOs via BenefitsCal. BenefitsCal/CalSAWS initial design and implementation has been postponed until final/revised policy is issued by both CDSS and DHCS and there is operational clarity agreed to by all parties. June 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.	Open	Medium	High	05/19/23

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		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 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.

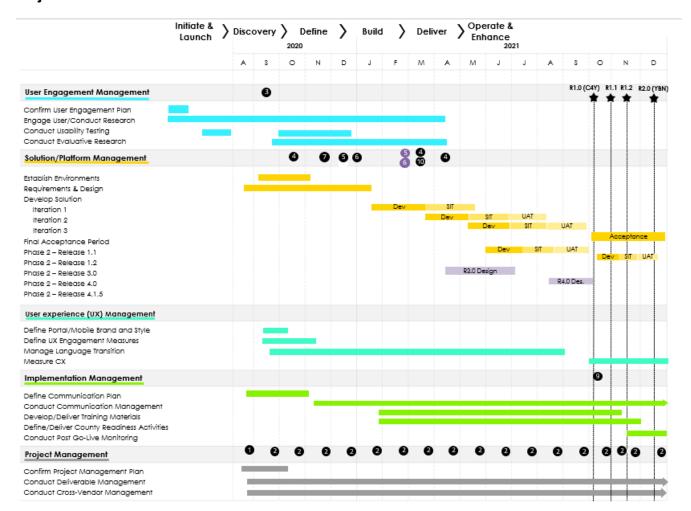| CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
None for the reporting period						

Table 6.3-1 – CITs

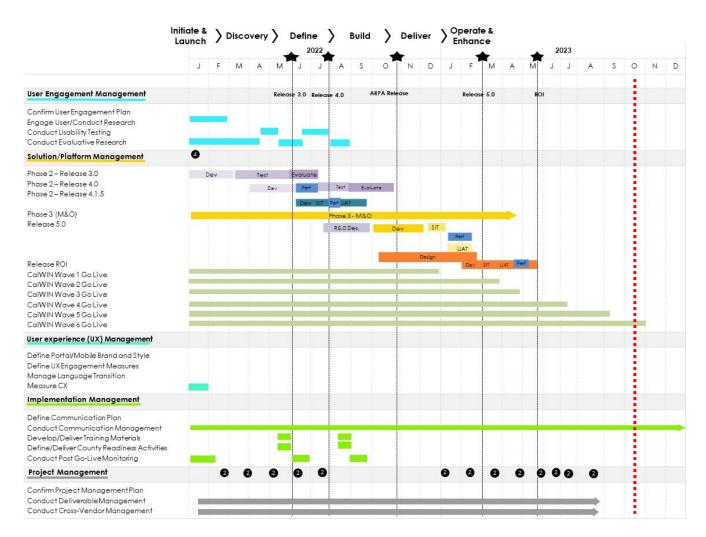The following table outlines CalSAWS Requests for Information (CRFIs) sent for the reporting period.

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