

CalSAWS BenefitsCal (Portal/Mobile) Weekly Status Report

**Reporting Period: October 30, 2023 to
November 5, 2023**

CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

Weekly Status Report, November 8, 2023

Period: October 30, 2023 to November 5, 2023

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
November Enhancements	<ul style="list-style-type: none">➤ Four (4) enhancements will be delivered to Production with the November Release 23.11.30:<ul style="list-style-type: none">○ One (1) Collaboration Enhancement○ One (1) Partner Support Enhancement○ One (1) Production Priority Enhancements○ One (1) Technical Enhancements
CalWIN Implementation Support Services (ISS) Support	<p>Wave 5</p> <ul style="list-style-type: none">➤ Maintenance & Operations (M&O) service management completed.➤ Health Metrics generation completed. <p>Wave 6</p> <ul style="list-style-type: none">➤ The CalWIN Wave 6 roll-out was successful.<ul style="list-style-type: none">○ Total # of Organizations created: 108○ Total # of CBO users created: 496➤ Email-4 campaign was launched on 10/30/23.<ul style="list-style-type: none">○ Total emails delivered: 56,929<ul style="list-style-type: none">▪ Sacramento: 40,948▪ San Francisco: 15,420▪ San Luis Obispo: 561➤ Maintenance & Operations (M&O) service management is in progress.➤ Health Metrics generation is in progress.
User Centered Design (UCD) Activities	<p>Customer Experience (CX) Measurements Data</p> <ul style="list-style-type: none">➤ Monitored the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues.➤ Published the Quarterly Report due in October. <p>User Engagement</p> <ul style="list-style-type: none">➤ Sent 40 recruitment emails to customers for Research Email Notifications (CSPM-67104). <p>Enhancements</p> <ul style="list-style-type: none">➤ Finished synthesis for five (5) generative research sessions for YouTube video links.➤ Plan and prepare for generative research sessions for Research Email Notifications.

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STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	<ul style="list-style-type: none"> ➤ Finished the design for chatbot expansion enhancement (CSPM-66583) based on Advocate and customer feedback. ➤ Created designs for the EBT 2259/CF 303 enhancement. ➤ Created the design for updating the messaging time to inform users the updated time in which the RE or SAR 7 link will be available (CSPM-66846). <p>Advocate Engagement</p> <ul style="list-style-type: none"> ➤ Drafted comment log responses for Chatbot Expansion enhancement (CSPM-66583).
GetCalFresh (GCF) Parity List	<ul style="list-style-type: none"> ➤ Participated in sessions facilitated by CDSS on 11/01/23, with participation from CWDA, Consortium and BenefitsCal for parity list. 3 items are closed, 4 items clarification provided to BenefitsCal team to estimate. There are 4 items remaining where CDSS and CFA to provide confirmation to finalize.
Collaboration Model (CM)	<ul style="list-style-type: none"> ➤ Next Collaboration Model meeting is scheduled for 12/01/23. ➤ The following CM Enhancements/Research activities are being performed in the month of November: <ul style="list-style-type: none"> ○ CSPM-67119: Collaboration Model – Document Upload for Users with No Account ○ CSPM-67189: Research for CM Enhancement: Display Primary Applicant Status on a Case ○ CSPM-67104: Research for CM Enhancement: Research E-mail Notifications to be sent from BenefitsCal

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

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1.2 PMO

1.2.1 Highlights of the Reporting Period

➤ **Deliverables and Work Products submitted:**

- None for the reporting period.

1.2.2 Activities for the Next Reporting Period

➤ **Deliverable and Work Product submissions for next reporting period:**

- DWP 25.21: BenefitsCal Monthly M&O Report – October 2023 on 11/08/23.
- FWP 2819: BenefitsCal Work Plan Monthly Updates – October 2023 on 11/07/23.
- FWP 2919: BenefitsCal Monthly Status Report – October 2023 on 11/07/23.

1.3 BenefitsCal Collaboration Model (CM)

1.3.1 Highlights of the Reporting Period

- Continued to prepare a roadmap for the CM model prioritized items.
- 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-67119 (Enhancement)	Collaboration Model: Document Upload for Users with No Account	Development In Progress	Analysis Completed; Development In Progress
CSPM-67150 (Research Item)	Research for CM Enhancement: Authorized Representative	Closed	We're putting the Authorized Representative research on hold until the ROI sessions. So far, we've synthesized our takeaways based on the six (6) research sessions with different stakeholders (Customer, County Staff members, CBOs, and IE SME) and updated our findings in Jira. Closing this current research item since we've spent the approved hours conducting generative

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ID	Summary	Status	Update this Week
			research sessions and have also performed research synthesis. Once we have determined the next course of action and are ready to continue with the Auth Rep research, we can create a new research item in Jira and get the approval to start the work.
CSPM-67600 (Research Item)	Research for CM Enhancement: Link to YouTube Videos on the dashboard and banner	Ready for Review	Conducted Research Synthesis from focused group sessions with the users. Currently Under Review.
CSPM-67104 (Research Item)	Research for CM Enhancement: Leverage Email Communications and Interactions	In Progress	User Recruitment in progress to conduct Focused Group Sessions.
CSPM-67189 (Enhancement)	Research for CM Enhancement: Display Primary Applicant Status on a Case	In Progress	User Recruitment in progress to conduct Focused Group Sessions.
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-67600 (Research Item)	Research for CM Enhancement: Link to YouTube Videos on the dashboard and banner	Conclude the generative research after research synthesis	October 2023
CSPM-67104 (Research Item)	Research for CM Enhancement: Leverage Email Communications and Interactions	Work on script creation and user recruitment to conduct focused group sessions.	November 2023

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ID	Summary	Activity for Next Week	Target Delivery Date
CSPM-67189 (Enhancement)	Research for CM Enhancement: Display Primary Applicant Status on a Case	Work on script creation and user recruitment to conduct focused group sessions.	November 2023
CSPM-67785 (Enhancement)	Collaboration Model: Update Document Type/ Upload feature	Prioritize for Future Release	TBD
CSPM-67761 (Enhancement)	Collaboration Model: Update Application and RE/SAR7 Status Tracker	Prioritize for Future Release	TBD

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 the development and testing teams for the October 2023 enhancements.
- Continued working with the development and testing teams for the November 2023 enhancements.
- Continued working with the development and testing teams for CalWORKs Time Clocks.
- Continued working with the development and testing teams for the Social Security Administration (SSA) Application on BenefitsCal enhancement CSPM-65292.
- Cohosted a GCF Parity Prep meeting with the Consortium on 10/30/23.
- Hosted the BenefitsCal County Welfare Directors Association of California (CWDA) Check-In on 10/30/23.
- Participated in a CM Enhancement Request Review meeting hosted by the Consortium on 10/31/23 and a CM Enhancement Request Process Flow meeting on 11/01/23.
- Participated in a meeting on 10/31/23 hosted by the Consortium to review the CM Enhancement Request.
- Participated in a meeting on 11/01/23 hosted by the Consortium to review the CM Enhancement Request Process Flow.
- Hosted a meeting on 11/02/23 with the Consortium to review the CM Enhancement Request.
- Hosted the DDI and M&O Biweekly meeting on 10/31/23 and 11/02/23.
- Participated in the App Dev meeting on 10/31/23.

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- Cohosted the SCERFRA Touchpoint with CalSAWS on 11/01/23.
- Participated in the GCF Parity meeting on 11/01/23.
- Hosted a meeting to discuss the Termination Reasons BenefitsCal Mapping on 11/03/23.

2.1.2 Activities for the Next Reporting Period – Requirements and Design

➤ Designs and Design Meetings

- Continue working with the development and testing teams for the November 2023 enhancements.
- Continue working with the development and testing teams for CalWORKs Time Clocks enhancement.
- Continue working with the development and testing teams for the SSA Application on BenefitsCal enhancement CSPM-65292.
- Host a follow-up discussion on 11/06/23 regarding Case Unlinking and Relinking.
- Participate in a meeting on 11/06/23 to discuss EBT Edge in BenefitsCal.
- Host the BenefitsCal CWDA Check-In meeting on 11/06/23.
- Host the DDI and M&O Bi-Weekly meeting on 11/07/23.
- Host the Case Relink Unlink Request meeting on 11/07/23.
- Attend the App Dev meeting on 11/07/23.
- Attend the Q4 CM Enhancement Review meeting on 11/08/23.
- Attend the BenefitsCal Analytics session on 11/08/23.
- Host the BenefitsCal PM Stand-Up meeting with the Consortium on 11/08/23.
- Host the DDI and M&O Biweekly meeting on 11/09/23.
- Host the BenefitsCal Enhancement Pipeline meeting on 11/10/23.

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.
- Resumed the creation of a detailed bimonthly data analysis sheet with process documentation and hard coded formulas for chart generation.

➤ User Engagement

- Sent 60 recruitment emails to customers for *Research Email Notifications* (CSPM-67104).

➤ Enhancements

- Finished synthesis for five (5) generative research sessions for YouTube video links.

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- Planned and prepared for the generative research sessions for *Research Email Notifications*.
- Finished the design for the chatbot expansion enhancement (CSPM-66583) based on Advocate and customer feedback.
- Created designs for the EBT2259/CF303 enhancement.
- Finalize the design for updating the messaging time to inform users the updated time in which the RE or SAR 7 link will be available (CSPM-66846).
- **Advocate Engagement**
 - Drafted the comment log responses for the *Chatbot Expansion* enhancement (CSPM-66583).

2.1.4 Activities for the Next Reporting Period – UCD

- **CX Measurements Data**
 - Monitor the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues.
 - Update the reporting template based on guidelines for better visualization of data and content.
 - Resume the creation of a detailed bimonthly data analysis sheet with process documentation and hard coded formulas for chart generation.
- **User Engagement**
 - Recruit stakeholders for the Time Clocks usability testing sessions.
 - Conduct generative research sessions for Research Email Notifications (CSPM-67104).
- **Enhancements**
 - Continue generative research on Research Email Notifications (CSPM-67104).
 - Prepare and plan for user testing sessions with customers for the Time Clocks enhancement.
 - Create designs for EBT-2259/CF303.
 - Finalize the design for updating the messaging time to inform users the updated time in which the RE or SAR 7 link will be available (CSPM-66846).
- **Advocate Engagement**
 - Draft comment log responses for Chatbot Expansion enhancement (CSPM-66583).
 - Send offline review to Advocates for December enhancement (CSPM-66846 and CSPM-67993)

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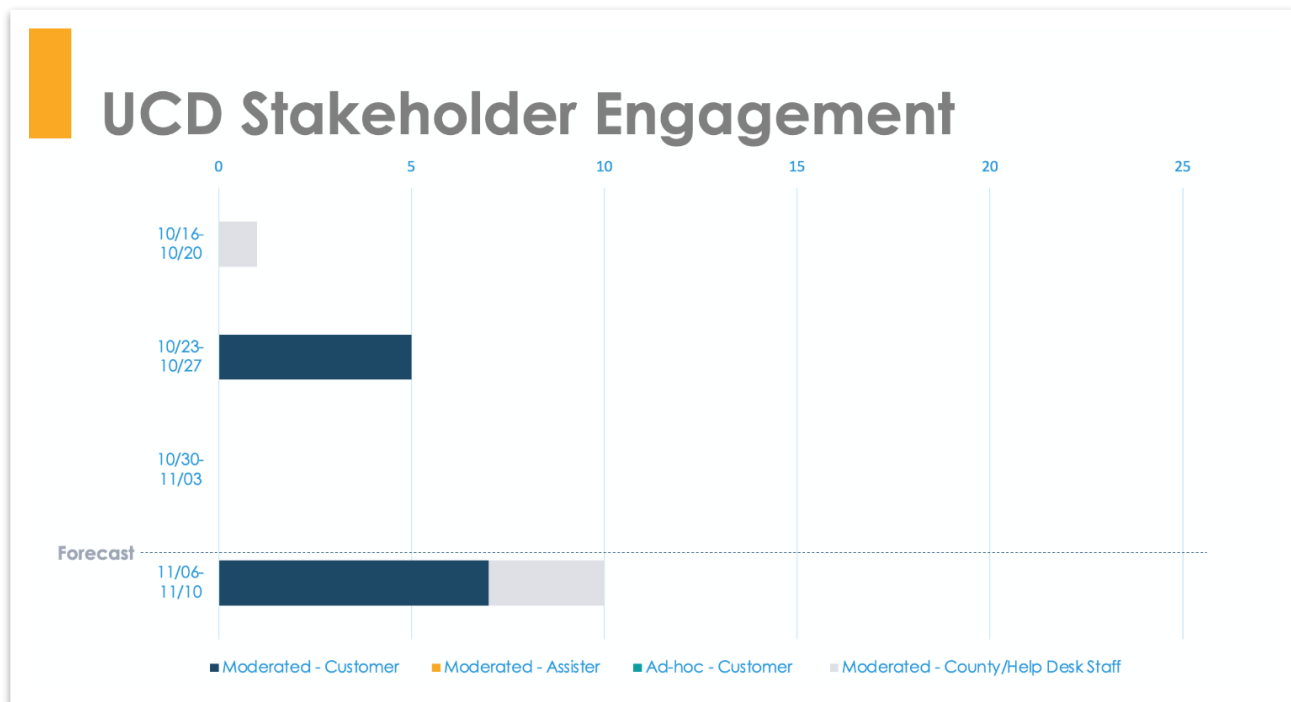


Figure 2.1-1 – UCD Stakeholder Engagement

2.2 Development

2.2.1 Highlights of the Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 11/03/23	Actual for Week Ending 11/03/23	Total Planned for the Release	Comments
23.10.30	1	1	1	CalWIN Wave 6 release was deployed to Production on 10/30/23.
23.11.09	1	0	1	CSPM-68059 planned for priority release on 11/09/23
23.11.30	1	1	5	CSPM-66724 and CSPM-67119 are already in the Development phase, however, since the completion time is longer, no enhancements completed this week.

Table 2.2-1 – Enhancement Actuals for Reporting Period

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2.2.2 Activities for the Next Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 11/10/23	Total Planned for the Release	Total Completed for the Release	Comments
23.10.30	1	1	1	CalWIN Wave 6 release was deployed to Production on 10/30/23.
23.11.09	1	1	1	CSPM-68059 is planned for priority release on 11/09/23.
23.11.30	2	5	1	

Table 2.2-2 – Planned Enhancement Work

Unscheduled Release Updates

➤ **Chatbot**

- The Amazon Web Services (AWS) team reported that the solution for the mute detection issues along with custom slot, currency slot issues in Chinese, Korean, and Japanese has been deployed. For these languages, testing is in progress. Once testing is complete and issues are identified, we will collaborate with the Amazon team to resolve them.
- Support for additional languages Korean, Japanese and Chinese is still not released by AWS. The next update is expected by January 2024.

➤ **Time Clock**

- The Time Clock release is planned for 03/25/24.

➤ **GCF-Parity**

- 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 01/25/24. CSPM-4611 is currently development in progress status.

2.3 System Test Execution

2.3.1 Highlights of the Reporting Period – System Test Execution

➤ **Release 23.11.30 – November Monthly Release**

- Continued validating tickets for November. Co-ordinated with the partners for E2E tickets.

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2.4 Activities for the Next Reporting Period – System Test Execution

- **Release 23.11.30 – November Monthly Release**
 - Continue validating all tickets for November. Coordinate with the partners for any E2E tickets.
- **Release 23.11.09 – November Priority Release**
 - Deploy the Priority Release for the SAR 7 and Chatbot fixes.

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 23.11.30– November Monthly Release**
 - The BenefitsCal team has determined to develop two (2) new performance scripts leveraging and covering the new APIs and document upload paths as part of the November Monthly Release scope. The other two (2) software upgrade enhancements do not require any script changes. The team will continue to develop the new scripts and enhance the performance test suite. Regarding the test executions, the team has planned the isolated tests with the Mock services for the middle of November.

Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
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%

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Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	10/23/23	11/24/23	Release 23.11.30 – November Monthly Release	Scope: Three (3) BenefitsCal enhancements are in scope for November monthly release. Document upload for users with no account requires existing document upload scripts updates and potentially new script development. Executions: Wednesday, 11/15/23 Friday, 11/17/23	40%

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**

- Reviewed the Wave 6 Prod CBO Load Exception report, finding zero (0) exceptions with this load.

4.1.2 Activities for the Next Reporting Period – User Conversion Testing

➤ **Perform CBO User Data Validation**

- No updates for this reporting period.

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 11/03/23.

4.2.2 Activities for the Next Reporting Period – Security

➤ **Identified Vulnerabilities**

- After the validation of the identified vulnerabilities, advise on the remediation activities to be performed by the BenefitsCal Development Team. Log defects in Jira for tracking purposes (weekly recurring activity).

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➤ AWS SSO for BenefitsCal

- Collaborate with the Consortium Security Team to update Amazon Web Services Single Sign-On (AWS SSO) users specific to BenefitsCal and facilitate onboarding and offboarding of AWS SSO for BenefitsCal users, as needed.

5.0 Communications and Training

5.1 Highlights of the Reporting Period

- The following CalWIN Wave 6 customer email was launched during the reporting period.

Communication Channel	Description	Distribution Date	Status
Email 4	Go-Live announcement	10/30/23	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

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Work Product Status by Submission

		Complete	Coming Soon	WAC Approval Pending
ID	Work Product Name	DWP	FWP	Final Approval
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
25.21	Monthly M&O Report – October 2023	11/08/23	11/21/23	11/30/23
28.18	BenefitsCal Work Plan Monthly Updates – September 2023	N/A	10/06/23	10/16/23
28.19	BenefitsCal Work Plan Monthly Updates – October 2023	N/A	11/07/23	11/17/23
29.18	BenefitsCal Monthly Status Report – September 2023	N/A	10/06/23	10/16/23
28.19	BenefitsCal Monthly Status Report – October 2023	N/A	11/07/23	11/17/23

Table 6.1-3 – Upcoming Work Product Deadlines

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
25.21	Monthly M&O Report – October 2023	On Track	DWP submission 11/08/23 FWP submission 11/21/23 FWP approval 11/30/23
28.19	BenefitsCal Work Plan Monthly Updates – October 2023	On Track	FWP submission 11/07/23 FWP approval 11/17/23
28.19	BenefitsCal Monthly Status Report – October 2023	On Track	FWP submission 11/07/23 FWP approval 11/17/23

Table 6.1-4 – Upcoming Work Product Deadlines

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6.2 Appendix B – Risks and Issues Summary

Project Risks and Issues

ID	Title	Details	Status	Risk Level	Severity	Date Logged
246	Perceived Gap in Functionality	<p>A perceived gap in functionality between GetCalFresh and BenefitsCal was identified. Select features identified within GetCalFresh are not present within BenefitsCal as they are not part of the project requirements, and change requests were logged to address. Impacts BenefitsCal adoption by Community Partners may be lower as they rely on features (like the referral code) to complete their work. The future migration from GCF to BenefitsCal in 2022 is at risk until features are added to BenefitsCal.</p> <p>Status Updates:</p> <p>September 2, 2022:</p> <ul style="list-style-type: none">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. <p>September 30, 2022:</p> <ul style="list-style-type: none">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. <p>January 6, 2023:</p> <ul style="list-style-type: none">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

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>provide direction on the implementation schedule.</p> <p>January 11, 2023:</p> <ul style="list-style-type: none">• Prioritization is requested by end of month so it can be incorporated into the roadmap. <p>February 2, 2023:</p> <ul style="list-style-type: none">• 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. <p>February 3, 2023:</p> <ul style="list-style-type: none">• 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. <p>March 3, 2023:</p> <ul style="list-style-type: none">• 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. <p>April 7, 2023</p> <ul style="list-style-type: none">• 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. <p>April 28, 2023:</p> <ul style="list-style-type: none">• 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				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>roadmap for implementation. Next meeting is scheduled on 05/03/23.</p> <p>June 2, 2023:</p> <ul style="list-style-type: none">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. <p>June 9, 2023:</p> <ul style="list-style-type: none">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. <p>June 30, 2023:</p> <ul style="list-style-type: none">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. <p>July 28, 2023:</p> <ul style="list-style-type: none">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. <p>September 1, 2023:</p> <ul style="list-style-type: none">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				

CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

Weekly Status Report, November 8, 2023

Period: October 30, 2023 to November 5, 2023

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>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.</p> <p>September 8, 2023:</p> <ul style="list-style-type: none">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. <p>September 29, 2023:</p> <ul style="list-style-type: none">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. <p>October 6, 2023:</p> <ul style="list-style-type: none">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.				

CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

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Period: October 30, 2023 to November 5, 2023

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	<p>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.</p> <p>June 16, 2023:</p> <ul style="list-style-type: none">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. <p>June 30, 2023:</p> <ul style="list-style-type: none">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

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>July 28, 2023:</p> <ul style="list-style-type: none"> 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. <p>September 1, 2023:</p> <ul style="list-style-type: none"> 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. <p>September 22, 2023:</p> <ul style="list-style-type: none"> 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.) <p>September 29, 2023:</p> <ul style="list-style-type: none"> 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

CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

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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
0372-23	PPOCs (58); Regional Managers (All); Self-Service Portal Committee (All)	BenefitsCal CalSAWS Features Status for Counties	CalSAWS M&E CalWIN Migration	11/01/23	Marsale Eramya	Carlos Zepeda
0373-23	PPOCs (All), Regional Managers (All)	Technical Contact List for CBO Support	CalSAWS M&E	11/0/23	Marsale Eramya	Carlos Zepeda

Table 6.3-1 – CITs

The following table outlines CalSAWS Requests for Information (CRFIs) distributed or with a response due date within the reporting period.

CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary BenefitsCal Contact	Backup BenefitsCal Contact
None.							

Table 6.3-2 – CRFIs

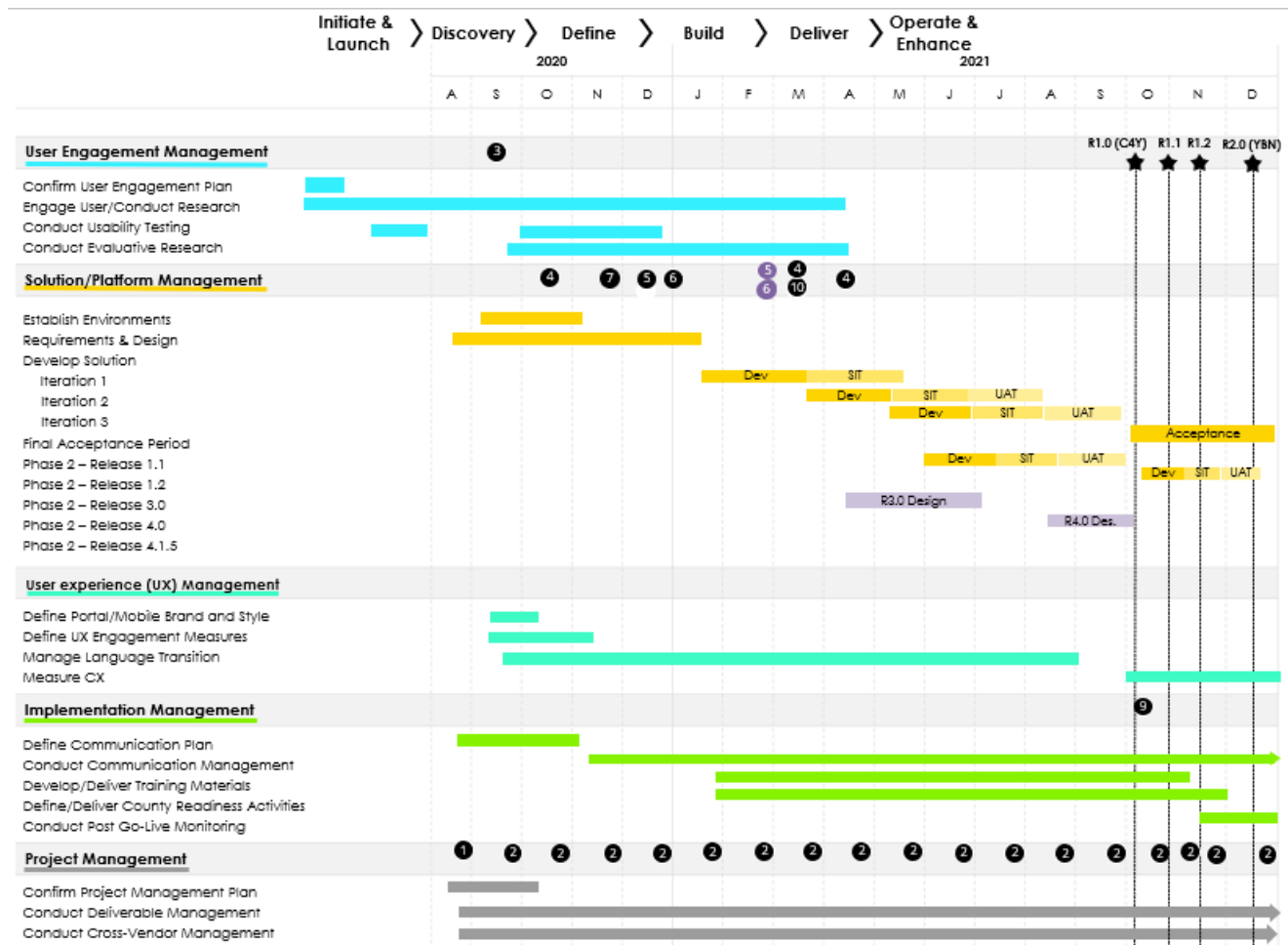
CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

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6.4 Appendix C – Project Work Plan Reports

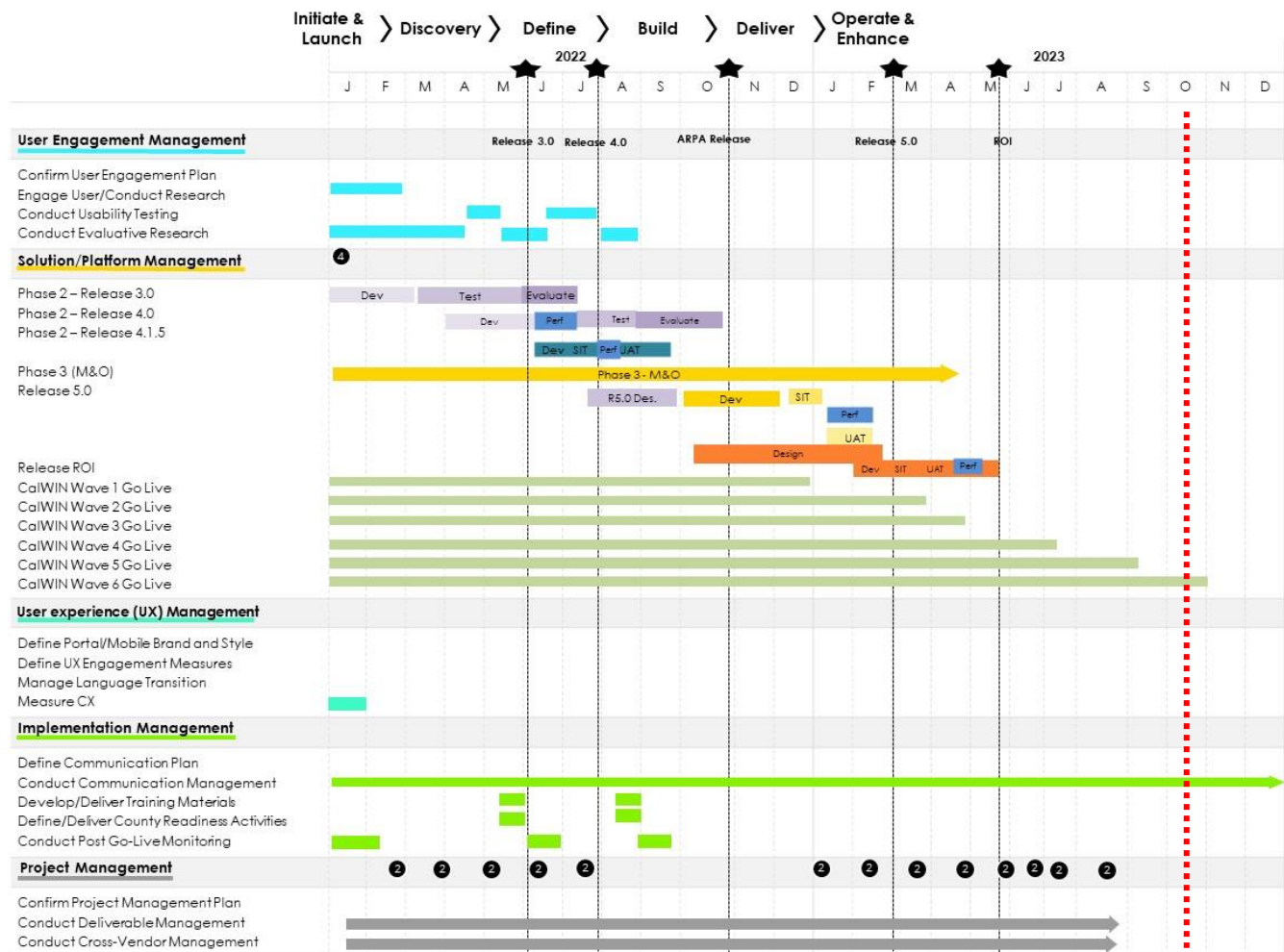
Project Timeline



CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

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Period: October 30, 2023 to November 5, 2023



Project Action Items – Overdue

This table lists overdue action items, including the owner and due date.

ID	Description	Owner	Due Date
None			

Table 6.4-1 – Overdue Action Items