

CalSAWS BenefitsCal (Portal/Mobile) Bi-Weekly Status Report

**Reporting Period: December 31, 2023 to
January 14, 2023**

CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

Weekly Status Report, January 17, 2024

Period: December 31, 2023 to January 14, 2023

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
January Enhancements	<ul style="list-style-type: none"> ➤ Seven (7) enhancements on schedule for the January Monthly Release 24.01.25 including: <ul style="list-style-type: none"> ○ CSPM-68183 – Document upload – New conditions will be added to display RE/SAR7 forms in “Document Type” dropdown. ○ CSPM-67784 - Update Dropdown list for document upload to include additional forms and display RE/SAR 7 categories on the top during Review Period. ○ Three (3) GCF Parity Items, #9, #19, #63.
March Enhancements (24.03)	<ul style="list-style-type: none"> ➤ Continued working on CalWORKs Timeclocks (EBT 2259 and CF 303) enhancements for the March 24.03 release.
User Centered Design (UCD) Activities	<ul style="list-style-type: none"> ➤ Customer Experience (CX) Measurements Data <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. ○ Analyzed December Always On survey data. ○ Reviewed and updated the bimonthly report based on feedback from reviewers. ➤ User Engagement <ul style="list-style-type: none"> ○ Sent recruitment emails to 100 customers for combo sessions [CSPM-68272, CSPM-68269, and CSPM-68110]. ○ Sent recruitment emails to 10 County Staff Members for Card Replacement Tracker [CSPM-68110]. ○ Conducted combo sessions [CSPM-68272, CSPM-68269, and CSPM-68110] with six (6) customers. ○ Started recruitment for CSPM-68109 [Disability Accommodation]. ➤ Enhancements <ul style="list-style-type: none"> ○ Planned and prepped for generative research sessions for CSPM-68110 [Card Replacement Tracker]. ○ Planned and prepped for usability testing research sessions for CSPM-68272 [adding a link to CalHOPE on the BenefitsCal homepage]. ○ Planned and prepped for usability testing research sessions for CSPM-68269 [displaying race options in alphabetical order].

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STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	<ul style="list-style-type: none"> ○ Conducted combo sessions [CSPM-68272, CSPM-68269, and CSPM-68110] with six (6) customers. ○ Started planning and recruitment for CSPM-68109 [Disability Accommodation]. ➤ Advocate Engagement <ul style="list-style-type: none"> ○ Planned and prepped for January's UCD Monthly Meeting.
GetCalFresh (GCF) Parity List	<ul style="list-style-type: none"> ➤ A working session was conducted with the CDSS (California Department of Social Services), CFA (Code for America), the CWDA (County Welfare Directors Association of California), CalSAWS, and BenefitsCal on 01/10/24. ➤ Four (4) items are pending discussions with the CDSS and before proceeding forward. ➤ The BenefitsCal and CalSAWS teams provided the revised version of the estimates for SCERFRA 23-500 – the five (5) parity items (numbers 22, 38, 44, 52, and 55) – on 11/17/23.

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:**
 - DWP 25.23: BenefitsCal Monthly M&O Report – December 2023 on 01/09/24.
 - FWP 26.07: BOM Review and License Renewal on 01/05/24.
 - FWP 27.07: Certificate Review on 01/05/24.
 - FWP 28.21: BenefitsCal Work Plan Monthly Updates – December 2023 on 01/08/24.
 - FWP 29.21: BenefitsCal Monthly Status Report – December 2023 on 01/08/24.

1.2.2 Activities for the Next Reporting Period

- **Deliverable and Work Product submissions for next reporting period:**
 - FWP 25.23: BenefitsCal Monthly M&O Report – December 2023 on 01/22/24.

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1.3 BenefitsCal Collaboration Model (CM)

1.3.1 Highlights of the Reporting Period

- Prioritization In Progress for the ten (10) items prioritized in the Quarter 3 Prioritization Results. (They have already been logged in Jira).
- Consolidation in progress for the ten (10) items prioritized in the 2023 – Quarter 4 Collaboration Model meeting.

The table below contains the enhancements prioritized by Collaboration Model and their updates from this week:

Issue Type	ID	Summary	Status	Update this Week
Enhancement	CSPM-67785	Collaboration Model: Update Document Type/ Upload feature	In Progress	CM Research outcomes will be shared during Jan UCD meeting on 01/16/24.
Enhancement	CSPM-67761	Collaboration Model: Update Application and RE/SAR 7 Status Tracker	Prioritization Needed	None
Enhancement	CSPM-68266	Collaboration Model: Link to YouTube Videos on the dashboard and banner	Prioritization Needed	None
Enhancement	CSPM-68377	Collaboration Model: Display primary applicant	Prioritization Needed	None
Enhancement	CSPM-68370	Collaboration Model: Leverage email communication and interactions	Prioritization Needed	None
Research Item	CSPM-64323	Research for CM Enhancement: Public dashboard of BenefitsCal data	Not Started	The meeting is scheduled for 01/18/24.

Table 1.3-1 – Enhancements Updates, Prioritized by CM

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1.3.2 Activities for the Next Reporting Period

- Prioritize Collaboration Model Items for future releases.
- 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.

Issue Type	ID	Summary	Activity for Next Week	Target Delivery Date
Enhancement	CSPM-67785	Collaboration Model: Update Document Type/ Upload feature	CM Research outcomes will be shared during Jan UCD meeting on 01/16/24	TBD
Enhancement	CSPM-67761	Collaboration Model: Update Application and RE/SAR 7 Status Tracker	Prioritize for Future Release	TBD
Enhancement	CSPM-68266	Collaboration Model: Link to YouTube Videos on the dashboard and banner	Prioritize for Future Release	TBD
Research Item	CSPM-64323	Research for CM Enhancement: Public dashboard of BenefitsCal data	Prioritize for Future Release	TBD
Enhancement	CSPM-68377	Collaboration Model: Display primary applicant	Prioritize for Future Release	TBD
Enhancement	CSPM-68370	Collaboration Model: Leverage email communication and interactions	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 design work for the January 2024 enhancements.
 - Began design work for the February 2024 enhancements.
 - Continued working with the development and testing teams for the January 2024 enhancements.
 - Continued working with the development and testing teams for the SSA (Social Security Administration) Application on BenefitsCal enhancement CSPM-65292.

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- Continued to work with the development and testing teams to clarify the designs for CalWORKs Timeclocks, EBT 2259 and CF 303 March enhancements.
- Hosted the BenefitsCal PM Stand-Up Meeting with the Consortium on 01/03/24.
- Hosted BenefitsCal Enhancement Pipeline Discussion on 01/05/24.
- Attended CAPI ACL Discussion on 01/05/24.
- Hosted SCRB CCB Comment Resolution on 01/05/24.
- Hosted Time Clocks API Discussion with CalSAWS on 01/08/24.
- Hosted the BenefitsCal CWDA Check-In on 01/08/24.
- Hosted DDI and M&O Biweekly Calls on 01/09/24 and 01/11/24.
- Attended CFAP Expansion Meeting 01/09/24.
- Hosted BenefitsCal M&E, DDI and Premise Items Touchpoint on 01/10/24.
- Hosted SIRFRA 1336 Discussion with CalSAWS on 1/10/24.
- Attended EBT Theft API Discussion on 1/10/24.
- Attended GCF Parity List Meeting on 01/10/24.
- Attended Legislative Briefing Update on 01/11/24.
- Attended SSA BenefitsCal Application Questions Meeting on 01/12/24.
- Attended UCD Monthly Meeting Prep on 01/12/24.

2.1.2 Activities for the Next Reporting Period – Requirements and Design

➤ Designs and Design Meetings

- Continue design work for the January 2024 enhancements.
- Continue design work for the February 2024 enhancements.
- Continue working with the development and testing teams for the January 2024 enhancements.
- Continue working with the development and testing teams for the SSA (Social Security Administration) Application on BenefitsCal enhancement CSPM-65292.
- Continue to work with the development and testing teams to clarify designs for CalWORKs Timeclocks (EBT 2259 and CF 303) March enhancements.
- Host DDI and M&O Biweekly Calls on 01/16/24, 01/18/24, 01/23/24, and 01/25/24.
- Host Monthly UCD with Advocates and State Partners on 01/16/24.
- Attend Collaboration Model Q1-2024 Activities and Timeline Review on 01/16/24.
- Attend CAPI Workgroup Meeting on 01/16/24.
- Host the BenefitsCal PM Stand-Up Meetings with the Consortium on 01/17/24 and 01/24/24.
- Attend Working Session with CFA for time to apply on BenefitsCal on 01/18/24.
- Host BenefitsCal Enhancement Pipeline Discussion on 01/19/24.
- Attend ROI Workgroup on 01/22/24.

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- Host the BenefitsCal CWDA Check-In on 01/22/24.
- Attend CFAP Expansion Meeting 01/23/24.
- Attend CALSAWS SCR User Group EBT 2259 Discussion on 01/24/24.
- Attend GCF Parity List Meeting on 01/24/24.

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.
- Analyzed December Always On survey data.
- Reviewed and updated bi-monthly report based on comment log.

➤ User Engagement

- Sent recruitment emails to 100 customers for combo sessions [CSPM-68272, CSPM-68269, and CSPM-68110].
- Sent recruitment emails to 10 County Staff Members for Card Replacement Tracker [CSPM-68110].
- Conducted combo sessions [CSPM-68272, CSPM-68269, and CSPM-68110] with six (6) customers.
- Started recruitment for CSPM-68109 [Disability Accommodation].

➤ Enhancements

- Planned and prepped for generative research sessions for CSPM-68110 [Card Replacement Tracker].
- Planned and prepped for usability testing research sessions for CSPM-68272 [add a link to CalHOPE on the BenefitsCal homepage].
- Planned and prepped for usability testing research sessions for CSPM-68269 [displaying race options in alphabetical order].
- Conducted combo sessions [CSPM-68272, CSPM-68269, and CSPM-68110] with six (6) customers.
- Planning and recruitment for CSPM-68109 [Disability Accommodation].

➤ Advocate Engagement

- Planned and prepped for January's UCD Monthly Meeting.

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.
- Analyze January Always On survey data.

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➤ User Engagement

- Conduct generative research sessions with County Staff members for CSPM-68110 [Card Replacement Tracker].
- Schedule and conduct generative research sessions with county staff members and CBOs (Community Based Organizations) for CSPM-68109 [Disability Accommodation].

➤ Enhancements

- Conduct generative research sessions for CSPM-68110 [Card Replacement Tracker]
- Design updates based on usability testing research sessions for CSPM-68272 [add a link to CalHOPE on the BenefitsCal homepage].
- Conduct generative research sessions for CSPM-68109 [Disability Accommodation].

➤ Advocate Engagement

- Review and respond to advocate comment log for February Enhancements.

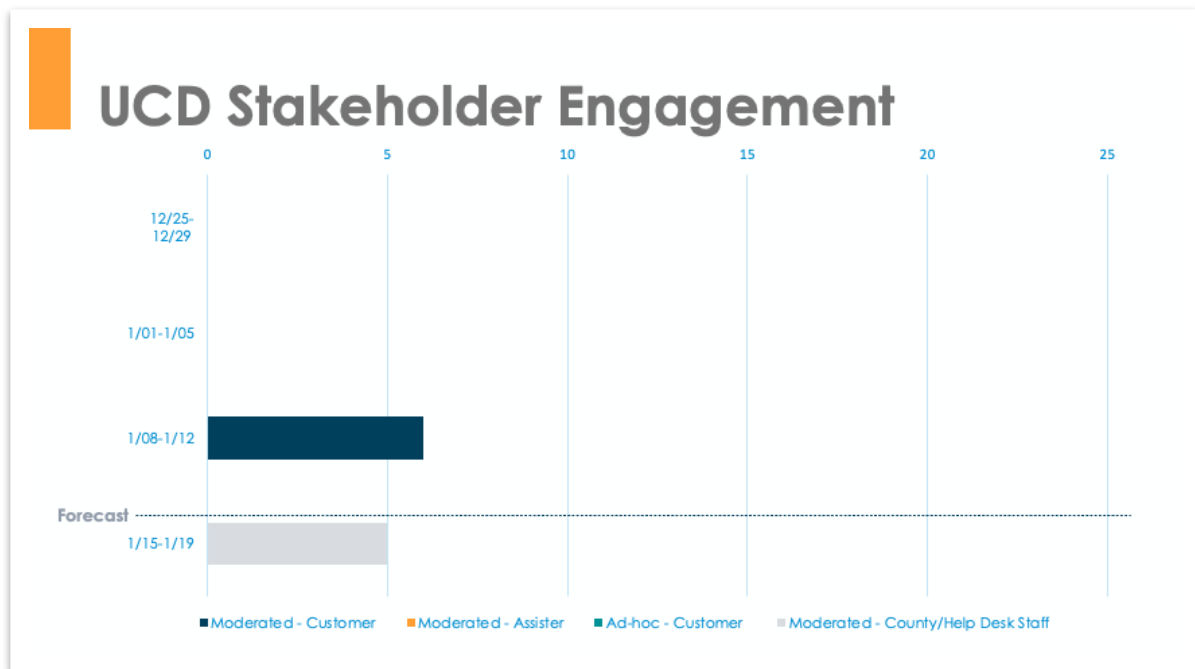


Figure 2.1-1 – UCD Stakeholder Engagement

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2.2 Development

2.2.1 Highlights of the Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending - 01/12/24	Actual for Week Ending 01/12/24	Total Planned for the Release	Comments
24.01.25 (GCF-Parity+ January Monthly release)	3	1	7	GCF Parity items (3) are planned for Release 24.01.25 along with regular monthly release (4) for the month of January.

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 01/19/24	Total Planned for the Release	Total Completed for the Release	Comments
24.01.25 (GCF-Parity + January Monthly release)	0	7	7	GCF Parity items (CSPM-67657, CSPM-67656, CSPM-4611) are planned for Release 24.01.25 along with regular monthly release for the month of January.

Table 2.2-2 – Planned Enhancement Work

Unscheduled Release Updates

➤ **Chatbot**

- The AWS Lex team has provided the fixes. While the development team is implementing these, we are working on identifying resources to help with testing the voice version in the native languages for Korean, Japanese, and Chinese.
- 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.

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2.3 System Test Execution

2.3.1 Highlights of the Reporting Period – System Test Execution

- **Release 24.01.25 – January Monthly Release**
 - Continued validated the items for the January release and coordinated with the Partner for items that require E2E coordination.

2.3.2 Activities for the Next Reporting Period – System Test Execution

- **Release 24.01.25 – January Monthly Release**
 - Continue validating the items planned for January and work with the partners for any tickets that require E2E coordination.
- **Release 24.03.25 – March Monthly Release**
 - Start Test Scripting for the March Monthly Release – Time Clock (CF 303 and EBT 2259).

2.4 User Acceptance Test (UAT) Planning

2.4.1 Highlights of the Reporting Period – User Acceptance Test Planning

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

2.4.2 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 24.01.25 – January Monthly Release**
 - The BenefitsCal team continues to work on the performance testing activities for the January monthly release. The Team completed the latest code migration to the performance environment and are validating the scripts and preparing for the isolated mock services performance test execution as per the plan and dates shown in the table below.

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Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	11/27/23	12/12/23	Release 23.12.19– December Monthly Release	<p>Scope: AWS Vulnerabilities and Logger Optimization enhancements are in scope for December monthly release. No new script development is needed, however, updates to existing Apply for Benefits (AFB) scripts are planned on the latest stable build.</p> <p>Executions: BenefitsCal isolated performance tests with Mock services plan: Tuesday, 12/12/23 Wednesday, 12/13/23</p>	100%
13	12/18/23	01/19/24	Release 24.01.25 – January Monthly Release	<p>Scope: One (1) key enhancement for the Document Upload dropdown list to add document type categories might require existing document upload scripts updates, will determine this upon validating scripts on the latest stable build. No new script development is required for January monthly release.</p> <p>Executions: BenefitsCal isolated performance tests with Mock services plan: Monday, 01/15/24 Tuesday, 01/16/24</p>	70%

Table 3.1-1 – Performance Test Cycles and Test Case Status

4.0 Security

4.1 User Conversion

4.1.1 Highlights of the Reporting Period – User Conversion Testing

- **CalWIN Conversion**
 - No updates for this reporting period.

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 01/05/24 and 01/12/24.

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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

- No activities for the reporting period.

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
24.21	CX Report – October/November 2023	12/13/23	12/26/23	01/03/23
25.22	BenefitsCal Monthly M&O Report – November 2023	12/11/23	12/21/23	12/29/23
25.23	BenefitsCal Monthly M&O Report – December 2023	01/09/24	01/22/24	01/29/24
26.07	BOM Review and License Renewal	N/A	01/05/24	01/16/24
27.07	Certificate Review	N/A	01/05/24	01/16/24
28.20	BenefitsCal Work Plan Monthly Updates – November 2023	N/A	12/07/23	12/18/23
28.21	BenefitsCal Work Plan Monthly Updates – December 2023	N/A	01/08/24	01/18/24
28.20	BenefitsCal Monthly Status Report – November 2023	N/A	12/07/23	12/18/23
29.21	BenefitsCal Monthly Status Report – December 2023	N/A	01/08/24	01/18/24

Table 6.1-3 – Upcoming Work Product Deadlines

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
25.23	BenefitsCal Monthly M&O Report – December 2023	On Track	DWP submitted 01/09/24 FWP submission 01/22/24 FWP approval 01/29/24
26.07	BOM Review and License Renewal	On Track	FWP submitted 01/05/24 FWP approval 01/16/24
27.07	Certificate Review	On Track	FWP submitted 01/05/24 FWP approval 01/16/24
28.21	BenefitsCal Work Plan Monthly Updates – December 2023	On Track	FWP submitted 01/08/24 FWP approval 01/18/24
29.21	BenefitsCal Monthly Status Report – December 2023	On Track	FWP submitted 01/08/24 FWP approval 01/18/24

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 biweekly 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 provide 	Open	Low	Medium	05/10/21

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>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 roadmap for implementation. 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>Next meeting is scheduled on 05/03/23.</p> <p>June 2, 2023:</p> <ul style="list-style-type: none"> Participated in the biweekly 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 biweekly 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"> Biweekly 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 are scheduled to be discussed 				

CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>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. <p>November 3, 2023:</p> <ul style="list-style-type: none"> Participated in sessions facilitated by CDSS on 11/01/23, with participation from CWDA, 				

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		<p>Consortium and BenefitsCal for parity list. Three items are closed, and four items have had clarification provided to BenefitsCal team to start estimation. Three items are remaining where CDSS and CFA to provide confirmation to finalize. One on BenefitsCal team to clarify by end of week starting 11/06/23.</p> <p>November 10, 2023:</p> <ul style="list-style-type: none"> • Work order #14 is submitted on 10/23/23 including the following items: <ul style="list-style-type: none"> ○ GCF Parity#20: CalFresh Application "Joint Processing" by Social Security Administration and County Welfare Departments in BenefitsCal – Development and Implementation ○ GCF Parity#31: CF303 ○ GCF Parity#9: Vaccination ○ GCF Parity#19: Self Employment Help Text ○ GCF Parity#63 Language Specific URLs <p>December 1, 2023:</p> <ul style="list-style-type: none"> • Work order 14 is presented during JPA board meeting in November 2023. • BenefitsCal and CalSAWS teams provided the revised version of the estimates for the SCERFRA 23-500 including the 5 parity items (#s 22, 38, 44, 52, 55) on 11/17/23. • CDSS is currently reviewing the estimates. • Next working sessions is scheduled on 12/06/23. • 4 items are pending clarification from CDSS & CFA before proceeding forward. <p>December 15, 2023:</p> <ul style="list-style-type: none"> • Working session conducted on 12/06/23. • Four (4) items are pending clarification from CDSS and CFA before proceeding forward. The BenefitsCal and CalSAWS teams 				

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		<p>provided the revised version of the estimates for SCERFRA 23-500 including the 5 parity items (#s 22, 38, 44, 52, 55) on 11/17/23.</p> <ul style="list-style-type: none"> Next working session is 01/03/24. <p>December 29, 2023:</p> <ul style="list-style-type: none"> Next working session is scheduled for 01/03/2024. Work is in progress for the items documented in Work Order #14 				
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>	Open	Medium	High	05/19/23

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		<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. <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>November 3, 2023:</p> <ul style="list-style-type: none"> • Applicant/recipient roles/responsibilities matrix (e.g., Authorized Representatives, Power of Attorney, CBOs, etc.) is currently jointly being developed. It will address Medi-Cal, CalFresh and CalWORKs programs. Next workgroup meeting is scheduled on 11/13/23. 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>December 1, 2023:</p> <ul style="list-style-type: none"> Workgroup sessions #6 conducted on 11/13/23. Group continued working on roles and responsibilities matrix as well as the liability and contract spectrum of the Next workgroup meeting is scheduled on 12/04/23. <p>December 15, 2023:</p> <ul style="list-style-type: none"> Workgroup session #7 and #8 conducted on 12/04/23 and 12/11/23. Discussions continued around additional chart for responsibilities to be developed to cover scenarios when contracts are in place or not. Next workgroup meeting is scheduled on 01/08/24. <p>December 29, 2023:</p> <ul style="list-style-type: none"> Next workgroup meeting is scheduled on 01/08/24. Stakeholders received updates regarding the workgroup progress during the Quarterly Stakeholder meeting held on 12/20/23 				

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
0005-24	Notify.All; usbenefitscaldevops@deloitte.com; operator@calheers.ca.gov; HoweG@CalSAWS.org; QuijadaP@CalSAWS.org; TombakianM@CalSAWS.org; tech.productionoperations@calaws.org	Scheduled CalSAWS Maintenance – System Downtime Notification – 1/21/2024	CalSAWS M&E	01/09/24	Anand Kulkarni	Pete Quijada

Table 6.3-1 – CITs

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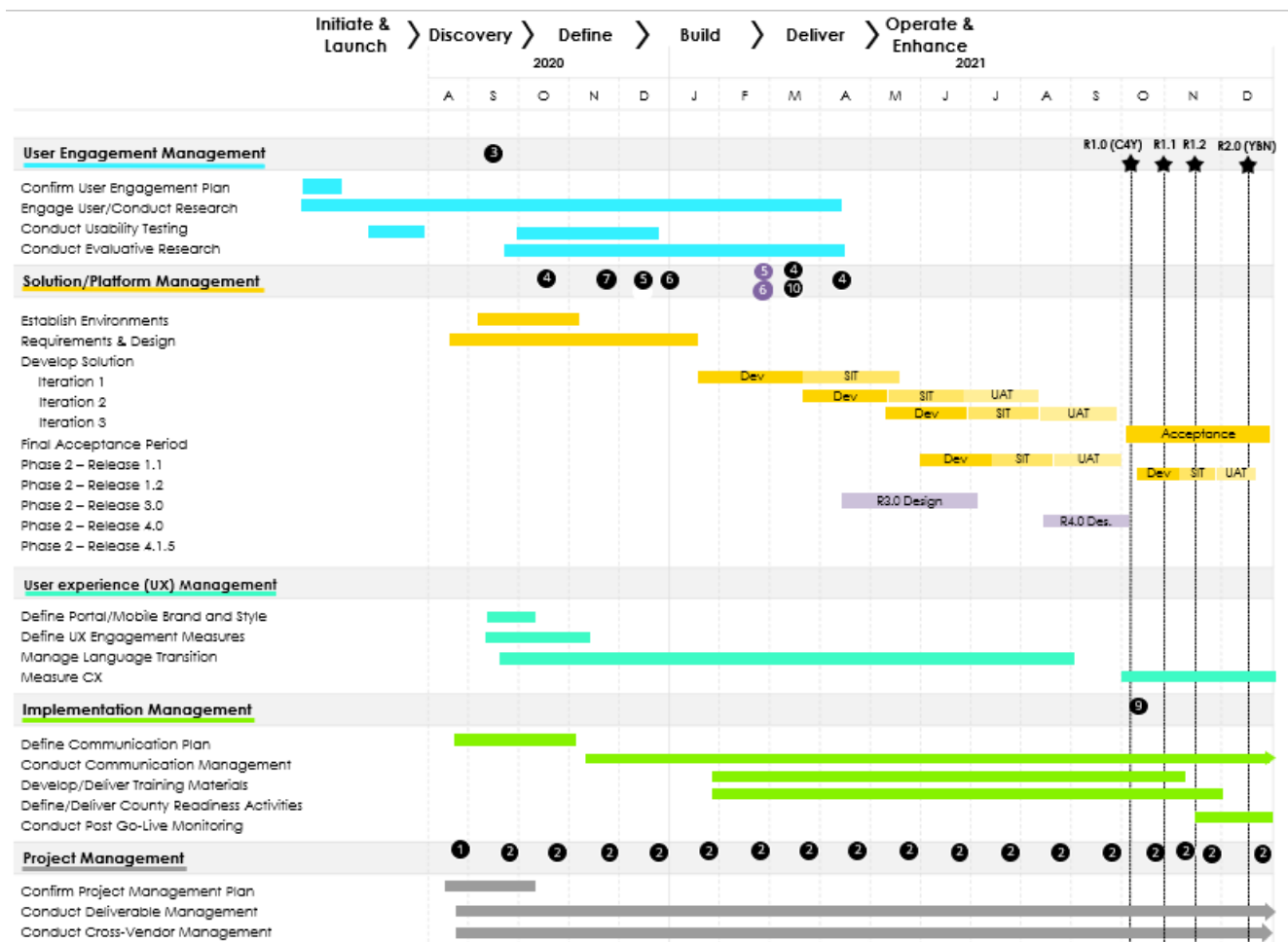
The following table outlines CalSAWS Requests for Information (CRFIs) distributed or with a response due date within the reporting period.

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

Table 6.3-2 – CRFIs

6.4 Appendix C – Project Work Plan Reports

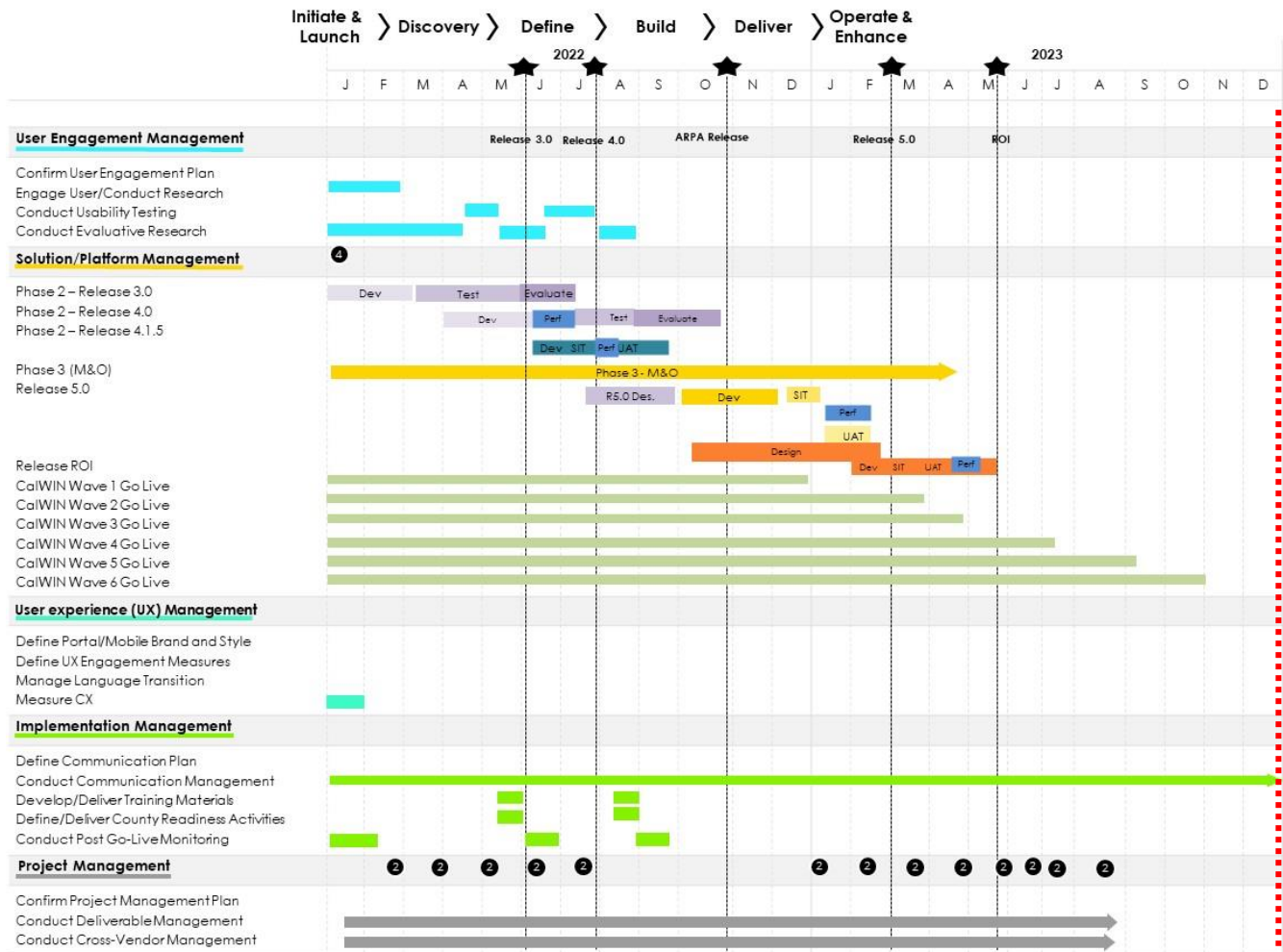
Project Timeline



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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