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

Reporting Period: January 29, 2024 to February 11, 2024

02/14/24

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
February Enhancements (Release 24.02.29)	➢ Two (2) enhancements on schedule for the February Monthly Release 24.02.29 including: o ***One (1) Policy Enhancement***: CSPM-69605 – Add EBT 2259A (11/21/23 version) in English and Spanish as downloadable form in BenefitsCal. o ***One (1) Collaboration Model Enhancement***: CSPM-68272 - Add link to CalHOPE on BC Homepage
March Enhancements (Release 24.03)	➢ ***Two (2) Policy enhancements*** on schedule for the March Baseline Release 24.03 including: o CSPM-65744: Digitize Form EBT2259 o CSPM-36812: Digitize Form CF303 (***GCF Parity #31***)
User Centered Design (UCD) Activities	➢ **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 Analyzed January Always On survey data. o Reviewed and updated bi-monthly report based on comment log. ➢ **User Engagement** o Conducted usability testing with customers for Document Upload [CSPM-67785]. o Conducted usability testing with county workers for Document Upload [CSPM-67785]. o Conducted customer recruitment for customer dashboard [CSPM-68213] o Conducted county staff member recruitment for Keep your Records [CSPM-68112] ➢ **Enhancements** o Conducted usability sessions for Document Upload [CSPM-67785]. o Finish design draft for Document Upload [CSPM-67785]. o Finalized discussion guide for Customer Dashboard [CSPM-68213] o Finalized discussion guide for Keep your Records [CSPM-68112] o Finished synthesis for Disability Accommodations [CSPM-68213] ➢ **Advocate Engagement** o Conducted February UCD monthly meeting.

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	○ Sent back comment log feedback from January UCD monthly meeting.
GetCalFresh (GCF) Parity List	➢ Parity items #9, #19 and #63 implemented and deployed to production with 24.01 release. Item #31 is on schedule for March 24.03 release. ➢ Working session conducted on 02/07/2024 with the CDSS (California Department of Social Services), CFA (Code for America), the CWDA (County Welfare Directors Association of California), CalSAWS, and BenefitsCal. ➢ Four (4) items are pending discussions with the CDSS on final disposition and before proceeding forward for estimation. ➢ Premise planning discussions continues with CDSS, Consortium and CWDA for the five (5) parity items (numbers 22, 38, 44, 52, and 55) – on 11/17/23 (where the BenefitsCal and CalSAWS teams provided the revised version of the estimates in November 2023)

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 25.24: BenefitsCal Monthly M&O Report – January 2024 on 02/08/24.
  - FWP 28.22: BenefitsCal Work Plan Monthly Updates – January 2024 on 02/07/24.
  - FWP 29.22: BenefitsCal Monthly Status Report – January 2024 on 02/07/24.

1.2.2 Activities for the Next Reporting Period

- **Deliverable and Work Product submissions for next reporting period:**
  - DWP 24.22: CX Monthly Report – December/January 2024 on 02/12/24.
  - FWP 25.24: BenefitsCal Monthly M&O Report – January 2024 on 02/20/24.

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.)
- Consolidated 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
Research Item	CSPM-68109	Research for CM Enhancement: Disability Accommodations	In Progress	Performed Generative Research Sessions and prepared for Research Synthesis
Research Item	CSPM-68110	Research for CM Enhancement: Card Replacement Tracker	In Progress	Performed Generative Research Sessions and prepared for Research Synthesis
Enhancement	CSPM-68272	Collaboration Model: Add link to CalHOPE on BC Homepage	Analysis In Progress	Design completed
Enhancement	CSPM-67785	Collaboration Model: Update Document Type/ Upload feature	Prioritization Needed	CM Research outcomes shared during Jan UCD meeting on 01/16/24, will be planned for April 2024.
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	On Hold	None

Table 1.3-1 – Enhancements Updates, Prioritized by CM

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
Research Item	CSPM-68109	Research for CM Enhancement: Disability Accommodations	Perform Research Synthesis and log SCR if needed, close out the Research Item	January 2024
Research Item	CSPM-68110	Research for CM Enhancement: Card Replacement Tracker	Perform Research Synthesis and log SCR if needed, close out the Research Item	January 2024
Enhancement	CSPM-68272	Collaboration Model: Add link to CalHOPE on BC Homepage	Continue with Development	February 2024
Enhancement	CSPM-67785	Collaboration Model: Update Document Type/ Upload feature	Prioritized for April 2024	April 2024
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 February 2024 enhancements.
  - Continued working with the development and testing teams on the January 2024 enhancements.
  - Continued working with the development and testing teams on the SSA (Social Security Administration) Application on BenefitsCal enhancement CSPM-65292.
  - Continued to work with the development and testing teams to clarify designs for the CalWORKs Timeclocks (EBT 2259 and CF 303) March enhancements.
  - Hosted the DDI and M&O Biweekly calls on 01/30/24, 02/01/24, 02/06/24, and 02/08/24.
  - Attended the ROI Demo Prep for ROI Workgroup on 01/29/24.
  - Hosted the BenefitsCal CWDA Check-Ins on 01/29/24 and 02/05/24.
  - Co-hosted the CV Test Timelines Discussion on 01/29/24.
  - Hosted the MFA Case Linkage Walkthrough with Consortium on 01/30/24.
  - Hosted the Timeclocks Approval Process for Updates on 01/30/24.
  - Attended the County Validation 24.03 Kickoff on 01/31/24.
  - Hosted the E-message Task Production Issue discussion on 01/31/24.
  - Hosted the BenefitsCal PM Stand-Up meetings with the Consortium on 01/31/24 and 02/07/24.
  - Hosted the BenefitsCal Enhancement Pipeline discussion on 02/02/24.
  - Attended the CV 24.05 touchpoint on 02/05/24.
  - Attended the ROI Workgroup Demo on 02/05/24.
  - Hosted the Prep for UCD Monthly Meeting with State Partners, CWDA and Consortium on 02/05/24.
  - Hosted the Review of GCF Parity Item #24 on 02/05/24.
  - Attended the Discussion on SCERFRA 23-543 on 02/05/24.
  - Attended the SSP Committee Meeting on 02/06/24.
  - Hosted Homeless Assistance Assumptions Update on 02/06/24.
  - Attended the Plan for Time Clocks Discussion on 02/07/24.
  - Attended the CV touchpoint for 24.03 on 02/07/24.
  - Attended the GCF Parity List meeting on 02/07/24.
  - Hosted the UCD Monthly Meeting with Advocates and State Partners on 02/07/24.

- Attended the Discussion on Unallocated Funds on 02/07/24.
- Attended the ABQ Updates for SCERFRA Meeting on 02/08/24.
- Co-hosted the Auth Rep Discussion for EBT 2259 on 02/08/24.

2.1.2 Activities for the Next Reporting Period – Requirements and Design

- **Designs and Design Meetings**
  - Continue design work for the February 2024 enhancements.
  - Continue working with the development and testing teams on the January 2024 enhancements.
  - Continue working with the development and testing teams on 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 the BenefitsCal CWDA Check-Ins on 02/12/24 and 02/19/24.
  - Host the DDI and M&O Biweekly calls on 02/13/24, 02/15/24, 02/20/24, and 02/22/24.
  - Attend the County Validation 24.03 Touchpoints on 02/13/24, 02/14/24, 02/15/24, 02/16/24, 02/20/24, 02/21/24, 02/22/24, and 02/23/24.
  - Attend the CFAP Expansion Meeting on 02/13/24.
  - Host the BenefitsCal PM Stand-Up Meetings with the Consortium on 02/14/24 and 02/21/24.
  - Host the BenefitsCal Enhancement Pipeline discussion on 02/16/24.
  - Attend the CAPI Automation Meeting on 02/20/24.
  - Attend the EBT 2259 User Group on 02/21/24.

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 January Always On survey data.
  - Reviewed and updated bi-monthly report based on comment log.
- **User Engagement**
  - Conducted usability testing with customers for Document Upload [CSPM-67785].
  - Conducted usability testing with county workers for Document Upload [CSPM-67785].
  - Conducted customer recruitment for customer dashboard [CSPM-68213].
  - Conducted county staff member recruitment for Keep your Records [CSPM-68112].

- **Enhancements**
  - Conducted usability sessions for Document Upload [CSPM-67785].
  - Finish design draft for Document Upload [CSPM-67785].
  - Finalized the discussion guide for Customer Dashboard [CSPM-68213].
  - Finalized the discussion guide for Keep your Records [CSPM-68112].
  - Finished the synthesis for Disability Accommodations [CSPM-68213].
- **Advocate Engagement**
  - Conducted the February UCD monthly meeting.
  - Returned the comment log feedback responses from the January 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 February Always On survey data.
- **User Engagement**
  - Conduct generative research with customers for Customer Dashboard [CSPM-68213].
  - Conduct generative research with county workers for Keep your Records [CSPM-68112].
  - Conduct usability testing with customers for Document Upload [CSPM-67785].
- **Enhancements**
  - Conduct generative research with customers for Customer Dashboard [CSPM-68213].
  - Conduct generative research with county workers for Keep your Records [CSPM-68112].
  - Conduct usability testing with customers for Document Upload [CSPM-67785].
  - Finalize design based on usability session feedback for Document Upload [CSPM-67785].
  - Start design for CSPM-68111.
- **Advocate Engagement**
  - Review and respond to the Advocate comment log for February enhancements.
  - Plan and prep for the March UCD monthly meeting.

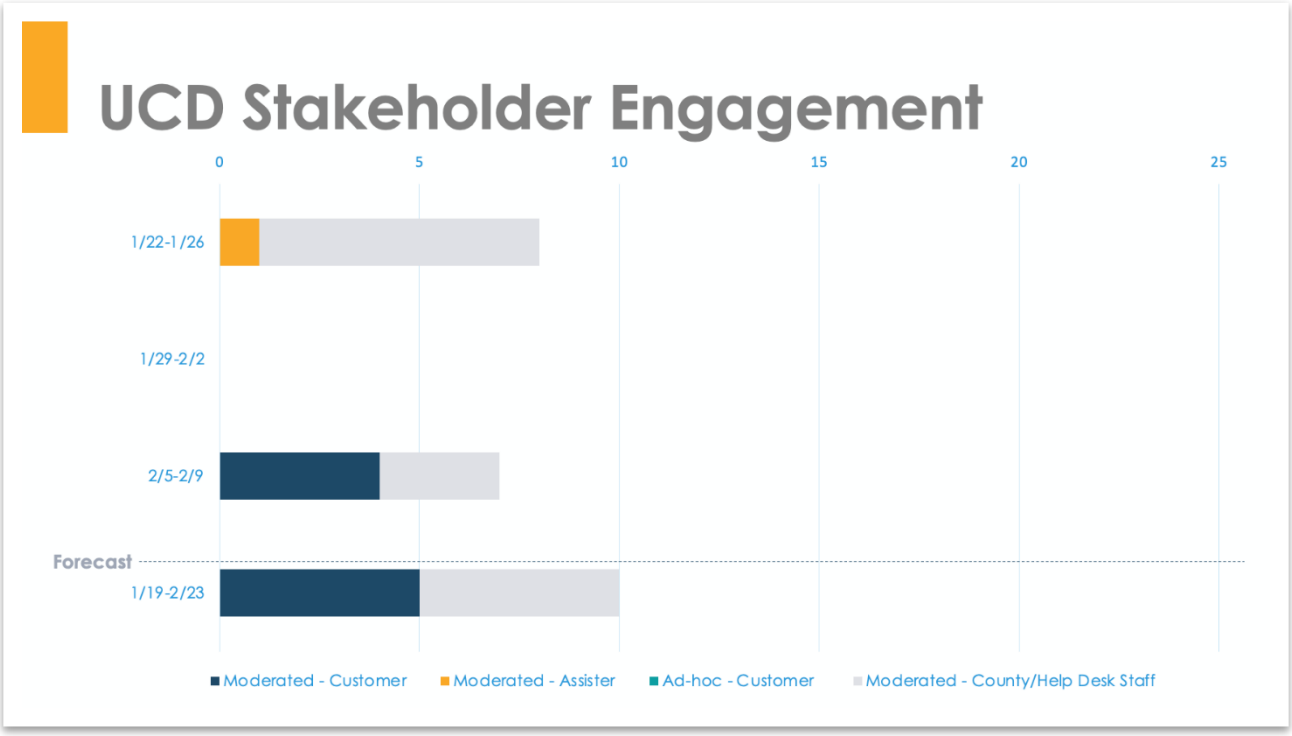


Figure 2.1-1 – UCD Stakeholder Engagement

2.2 Development

2.2.1 Highlights of the Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending - 01/19/24	Actual for Week Ending 01/19/24	Total Planned for the Release	Comments
Release 24.02.29	0	0	0	

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 01/26/24	Total Planned for the Release	Total Completed for the Release	Comments
Release 24.02.29	0	0	0	

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 and EBT2259/CF303 release is planned for 03/25/24.

2.3 System Test Execution

2.3.1 Highlights of the Reporting Period – System Test Execution

- **Release 24.02.29 – February Monthly Release**
  - Continued validated the items for the February release and coordinated with the Partner for items that require E2E coordination.
- **Release 24.03.25 – March Monthly Release**
  - Started Test Execution for the March Monthly Release – Time Clock, CF 303 and EBT 2259.

2.3.2 Activities for the Next Reporting Period – System Test Execution

- **Release 24.02.29 – February Monthly Release**
  - Continue validating the items planned for February and work with the partners for any tickets that require E2E coordination.
- **Release 24.03.25 – March Monthly Release**
  - Continuing Test Execution 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 24.02.29 – February Monthly Release**
  - The BenefitsCal team is in progress to validate all the performance scripts on the February monthly release codebase and the team will execute the isolated performance tests with mock services as per the below plan.

Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	12/18/23	01/19/24	Release 24.01.25 – January Monthly Release	**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 the January monthly release. **Executions:** BenefitsCal isolated performance tests with Mock services plan: Monday, 01/15/24 Tuesday, 01/16/24	100%
13	01/22/24	02/16/24	Release 24.02.29 – February Monthly Release	**Scope**: No February monthly release enhancements require performance scripts updates/modification. The Team will plan and execute the regular Mock services performance test on the latest codebase/build. **Executions**: BenefitsCal isolated performance tests with Mock services plan: Thursday, 02/15/24 Friday, 02/16/24	60%

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

4.0 Security

4.1 User Conversion

4.1.1 Highlights of the Reporting Period – User Conversion Testing

- No updates for this reporting period.

4.1.2 Activities for the Next Reporting Period – User Conversion Testing

- 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 02/02/24 and 02/09/24.
- **DAST**
  - Executed the bi-weekly Dynamic Application Security Testing (DAST) manual penetration testing test cases and shared the analysis of the security scan reports with the BenefitsCal Development Team on 02/09/24.
- **CloudCheckr**
  - Reviewed the reported CloudCheckr scan results of BenefitsCal AWS security misconfigurations. Analyzed the scan results with the BenefitsCal DevOps Team to identify the findings that needed remediation and planned for the remediation activities. The BenefitsCal Security and DevOps Teams met with the Consortium Security Team on 01/30/24 and 02/06/24 to review the reported findings, analysis details and planned remediation activities.

4.2.2 Activities for the Next Reporting Period – Security

- **Identified Vulnerabilities**
  - After the validation of the identified vulnerabilities, advised on the remediation activities to be performed by the BenefitsCal Development and DevOps 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

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
24.22	CX Monthly Report – December/January 2024	02/12/24	02/23/24	02/29/24
25.24	BenefitsCal Monthly M&O Report – January 2024	02/08/24	02/20/24	03/01/24
28.22	BenefitsCal Work Plan Monthly Updates – January 2024	N/A	02/07/24	02/19/24
29.22	BenefitsCal Monthly Status Report – January 2024	N/A	02/07/24	02/19/24

Table 6.1-3 – Upcoming Work Product Deadlines

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
24.22	CX Monthly Report – December/January 2024	On Track	DWP submission 02/12/24 FWP submission 02/23/24 FWP approval 03/01/24
25.24	BenefitsCal Monthly M&O Report – January 2024	On Track	DWP submission 02/08/24 FWP submission 02/20/24 FWP approval 02/29/24
28.22	BenefitsCal Work Plan Monthly Updates – January 2024	On Track	FWP submission 02/07/24 FWP approval 02/16/24

WP #	Work Product Name	Status	Next Deadline
29.22	BenefitsCal Monthly Status Report – January 2024	On Track	FWP submission 02/07/24 FWP approval 02/16/24

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 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. 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 provide	Open	Low	Medium	05/10/21

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

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		Next meeting is scheduled on 05/03/23. June 2, 2023: • 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. 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: • 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. 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 are scheduled to be discussed				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		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. November 3, 2023: • Participated in sessions facilitated by CDSS on 11/01/23, with participation from CWDA,				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		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. November 10, 2023: • Work order #14 is submitted on 10/23/23 including the following items: o GCF Parity#20: CalFresh Application "Joint Processing" by Social Security Administration and County Welfare Departments in BenefitsCal – Development and Implementation o GCF Parity#31: CF303 o GCF Parity#9: Vaccination o GCF Parity#19: Self Employment Help Text o GCF Parity#63 Language Specific URLs December 1, 2023: • 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. December 15, 2023: • 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				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		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. • Next working session is 01/03/24. December 29, 2023: • Next working session is scheduled for 01/03/2024. Work is in progress for the items documented in Work Order #14. January 12, 2024: • Working sessions was conducted on 01/10/2023. There is 5 items (estimates provided) to CDSS require funding conversation in order to be added to roadmap/timeline. • 4 items pending CFA to confirm a timeline to provide clarifications				

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. July 28, 2023: • Workgroup member names are being collected including	Open	Medium	High	05/19/23

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		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.) November 3, 2023: • 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. December 1, 2023: • 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. December 15, 2023: • Workgroup session #7 and #8 conducted on 12/04/23 and 12/11/23. Discussions continued				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		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. December 29, 2023: • 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
None.						

Table 6.3-1 – CITs

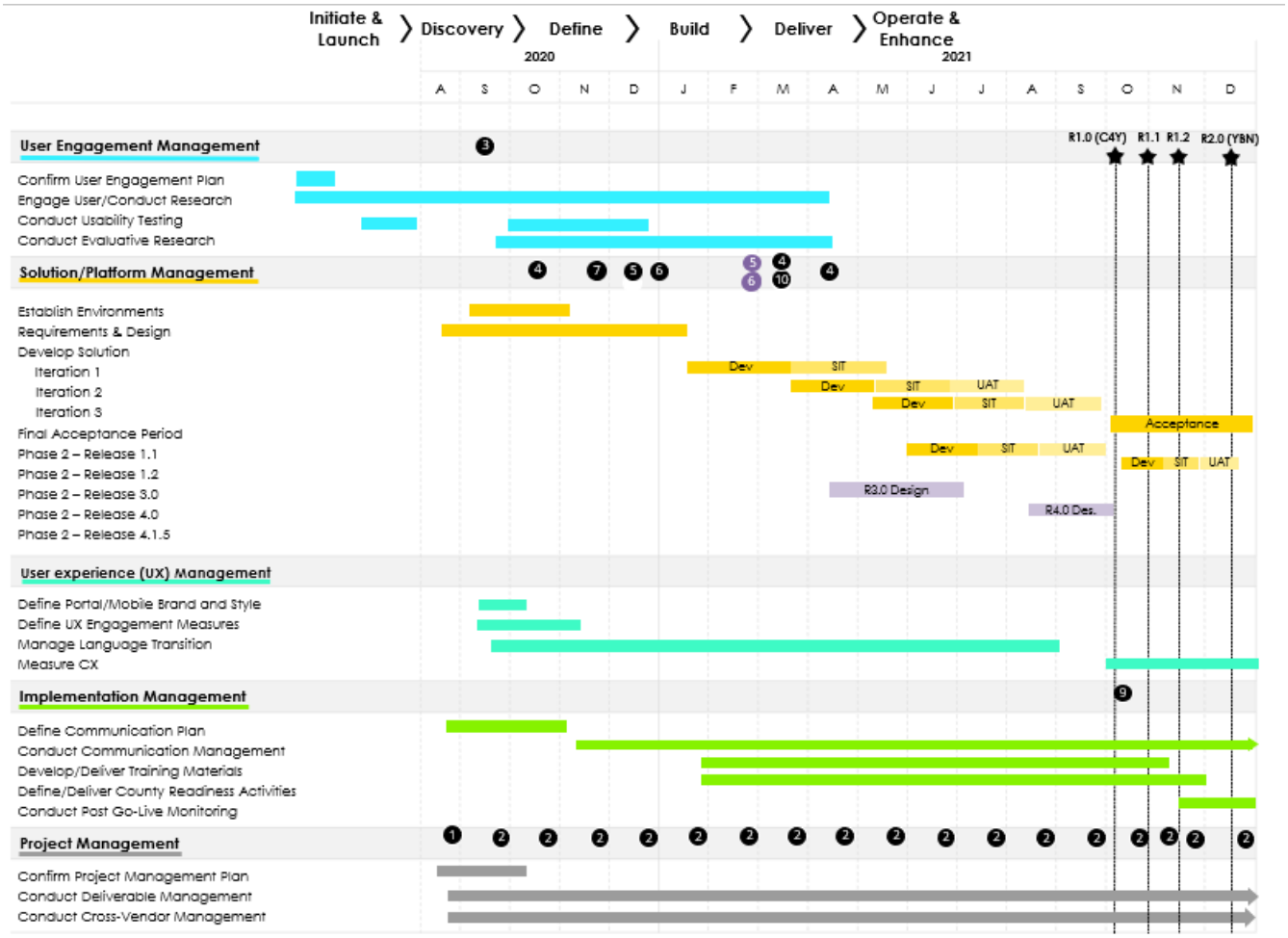
The following table outlines CalSAWS Requests for Information (CRFIs) distributed or with a response due date within the reporting period.

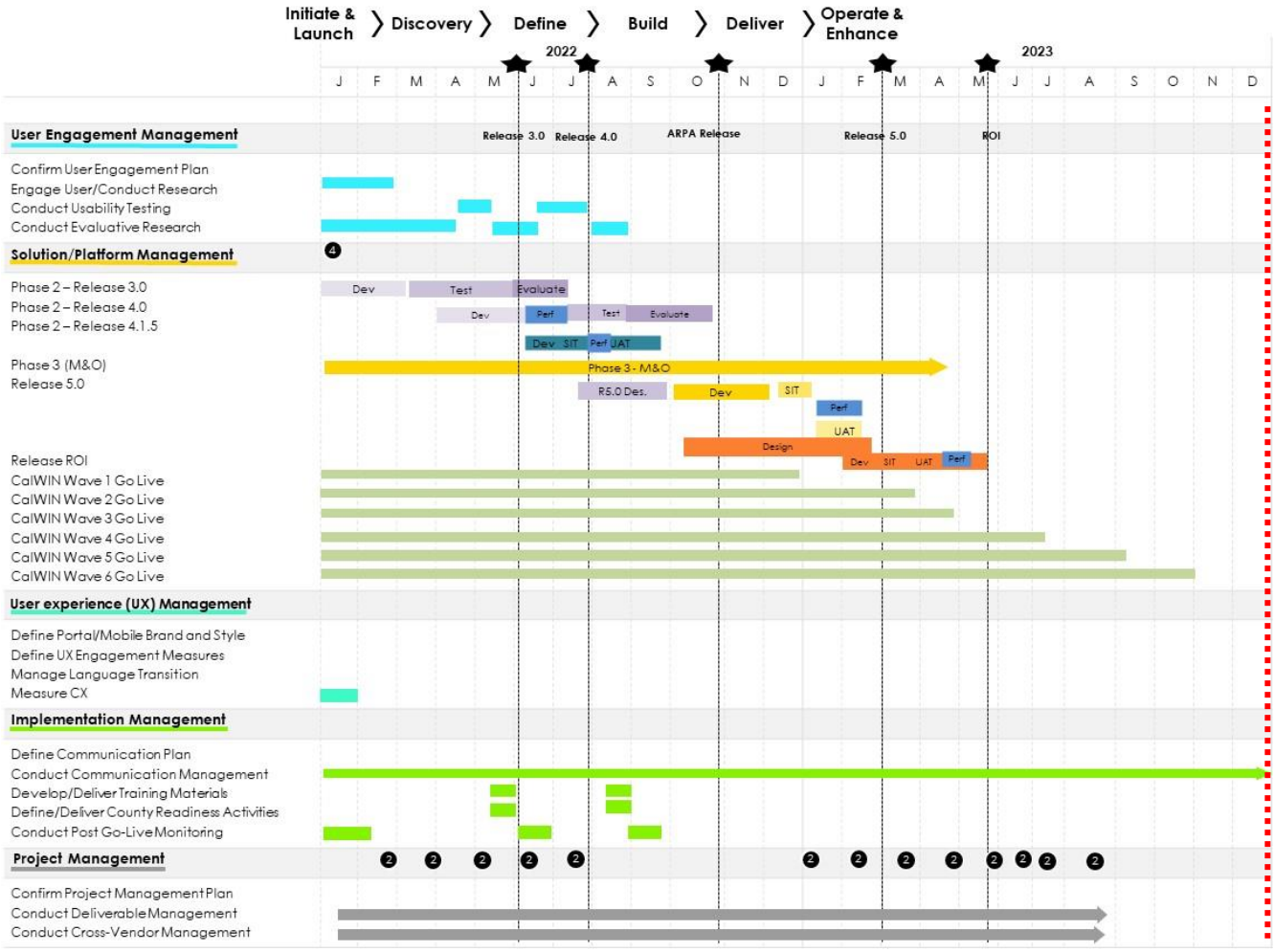
CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary BenefitsCal Contact	Backup BenefitsCal Contact
None.							

Table 6.3-2 – CRFIs

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