CalSAWS BenefitsCal (Portal/Mobile) Biweekly Status Report

Reporting Period: February 26, 2024 to March 10, 2024

03/13/24

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
February Enhancements (Release 24.02.29)	➢ Three(3) enhancements deployed to Production on 2/29/24 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 the BenefitsCal Homepage. o ***One (1) Security Enhancement:*** CSPM-71929 – Hide the Blue Banner about Case Linking on the Customer Dashboard.
March Enhancements (Release 24.03)	➢ **Four (4) enhancements** on schedule for the March Baseline Release 24.03 including: o **Three (3) Policy enhancements** ▪ CSPM-65744: Digitize Form EBT 2259. ▪ CSPM-36812: Digitize Form CF 303 (***GCF Parity #31***). ▪ CSPM-66525: Implement the time limits feature in Production (with flag turned off) o **One (1) Security enhancement:** ▪ CSPM-71735 – Enable Multi-Factor Authentication (MFA) for Login in BenefitsCal to allow customers to select MFA preferences.
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 Reviewed and updated FWP (Final Work Product) 24.22: CX Report (December 2023/January 2024) report based on comment log feedback. o Analyzed February data for the Always-on survey. ➢ **User Engagement** o Conducted generative research sessions with customers for Customer Dashboard [CSPM-68213]. o Conducted generative research sessions with county staff members for Customer Dashboard [CSPM-68213]. o Conducted a usability testing session with customers for Case Linking [CSPM-68111].

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	○ Conducted a usability testing session with customers for MFA language test. ➢ **Enhancements** ○ Conducted generative research sessions for Customer Dashboard [CSPM-68213]. ○ Finished synthesis for Keep your Records [CSPM-68112]. ○ Finished the design for Doc type/upload [CSPM-67785]. ○ Began research for Email Notification [CSPM-67104]. ○ Began designs for MFA case linking [CSPM-68189]. ○ Continued usability testing for MFA language test. ○ Conducted usability testing sessions for Case linking help text [CSPM-68111]. ➢ **Advocate Engagement** ○ Responded to comment log responses to feedback for the February UCD monthly meeting. ○ Prepped for the March UCD monthly meeting.
GetCalFresh (GCF) Parity List	➢ A working session was conducted on 03/06/24 with the CDSS, Consortium, and CWDA on Premise funding and open items. ➢ Parity items #9, #19 and #63 implemented and deployed to production with the 24.01 release. ➢ Item #31 is on schedule for the March 24.03 release. ➢ Item #20 is on schedule for the May 24.05 release. ➢ Premise planning discussions continued with the CDSS, Consortium, and CWDA for the four (4) parity items #22, #34, #44, #52, and #55 (where the BenefitsCal and CalSAWS teams provided the revised version of the estimates in November 2023). ➢ The CDSS suggested closure and requested BenefitsCal recommendations on three (3) parity items #24, #46, and #51. The Consortium is working with the CWDA to finalize the recommendations for these. ➢ Provided estimates to the CDSS for one (1) parity item #34 in March 2024.

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:**
  - FWP 24.22: CX Monthly Report – December/January 2024 on 02/29/24.
  - FWP 28.22: BenefitsCal Work Plan Monthly Updates – February 2024 on 03/07/24.
  - FWP 29.22: BenefitsCal Monthly Status Report – February 2024 on 03/07/24.

1.2.2 Activities for the Next Reporting Period

- **Deliverable and Work Product submissions for next reporting period:**
  - DWP 25.24: BenefitsCal Monthly M&O Report – February 2024 on 03/11/24.

1.3 BenefitsCal Collaboration Model (CM)

1.3.1 Highlights of the Reporting Period

- Prioritization In Progress for items prioritized in 2023 Q3 & Q4. (They have already been logged in Jira.)

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	Disability Accommodations	Closed	Performed Generative Research Sessions and Research Synthesis; Logged SCR
Research Item	CSPM-68110	Card Replacement Tracker	Closed	Performed Generative Research Sessions and Research Synthesis; Logged SCR
Research Item	CSPM-68213	Keep for you records	Ready for Review	Research concluded, outcome under review.
Research Item	CSPM-68112	Revamp Customer Dashboard	In Progress	Research In Progress; 7 Customer focused sessions conducted.
Enhancement	CSPM-68272	Add link to CalHOPE on BC Homepage	Closed	Deployed to Production
Research Item	CSPM-71555	BenefitsCal Email Notifications	In Progress	Research In Progress with Policy team
Research Item	CSPM-71551	CBO (Community Based Organization) Support Assistance	Not Started	Prioritized for April 2024
Research Item	CSPM-71962	Duplicate applications	Not Started	Prioritized for April 2024

Issue Type	ID	Summary	Status	Update this Week
Enhancement	CSPM-67785	Update Document Type/ Upload feature	Analysis In Progress	Design completed; Incorporated stakeholder feedback and updated GSDs; Moved to Analysis in Progress
Research Item	CSPM-71544	Document Upload - List of Options	Not Started	Prioritized for May 2024
Research Item	CSPM-71543	Document Upload - Multiple Docs	Not Started	Prioritized for May 2024
Enhancement	CSPM-68111	Display Help Text for Customers when Case does NOT link automatically	Ready for Estimation	Estimation In Progress; Tentatively Prioritized for May 2024
Research Item	CSPM-71552	Orange Banner	Not Started	Prioritized for June 2024
Research Item	CSPM-68269	Display Race Options In Alphabetical Order	Request For Estimation	Prioritized for May 2024; Estimation In Progress
Enhancement	CSPM-67761	Update Application and RE/SAR7 Status Tracker	Prioritization Needed	Tentatively Prioritized for June2024

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-68213	Keep for you records	Review the outcome of research item and close in Jira after making sure the outcome is captured in the associated SCR logged.	03/15/24
Research Item	CSPM-68112	Revamp Customer Dashboard	Conclude the research after conducting remaining focused group sessions with the customer.	03/15/24
Research Item	CSPM-71555	BenefitsCal Email Notifications	Conduct Research with Policy	03/31/24
Research Item	CSPM-71551	CBO Support Assistance	Prepare Research Plan	04/30/24
Research Item	CSPM-71962	Duplicate applications	Prepare Research Plan	Prioritized for April 2024

Issue Type	ID	Summary	Activity for Next Week	Target Delivery Date
Enhancement	CSPM-67785	Update Document Type/ Upload feature	Start Development	04/25/24
Research Item	CSPM-71544	Document Upload - List of Options	N/A	05/31/24
Research Item	CSPM-71543	Document Upload - Multiple Docs	N/A	05/31/24
Enhancement	CSPM-68111	Display Help Text for Customers when Case does NOT link automatically	Conduct Effort Estimation and capture Consortium approval on the number of hours	05/23/24
Research Item	CSPM-71552	Orange Banner	N/A	06/30/24
Research Item	CSPM-68269	Display Race Options In Alphabetical Order	Conduct Effort Estimation and capture Consortium approval on the number of hours	05/23/24
Enhancement	CSPM-67761	Update Application and RE/SAR7 Status Tracker	N/A	06/27/24
Enhancement	CSPM-67761	Update Application and RE/SAR7 Status Tracker	N/A	06/27/24

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.
  - Began design work for the April 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 February 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 BenefitsCal CWDA Check-Ins on 02/26/24 and 03/04/24.
  - Hosted the DDI and M&O Biweekly calls on 02/27/24, 02/29/24, 03/05/24, and 03/07/24.

- Attended the CFAP Expansion Meeting on 02/27/24.
- Attended Disaster CalFresh Planning Meetings on 02/27/24, 02/29/24, and 03/05/24.
- Attended the County Validation 24.03 Touchpoints on 02/27/24, 02/28/24, 02/29/24, and 03/01/24.
- Hosted a SCERFRA Touchpoint on 02/28/24.
- Hosted the BenefitsCal PM Stand-Up Meeting with the Consortium on 02/28/24.
- Attended the MFA Case Linking Discussion on 02/29/24.
- Attended the EBT 2259 API Updates Discussion on 02/29/24.
- Attended CalSAWS Security Incident Follow-Ups with Advocates on 02/29/24 and 03/05/24.
- Attended the Case Link MFA Technical Discussion on 03/01/24.
- Attended the Collaboration Model Prep Call on 03/01/24.
- Attended the ROI Work Group on 03/04/24.
- Cohosted an EBT 2259 Dry Run on 03/04/24.
- Attended County Validation 24.03 Defect Retest/Close-Out Meetings on 03/04/24 and 03/05/24.
- Attended the SIRFRA 3957 Discussion on 03/05/24.
- Hosted a Working Session with ForgeRock on 03/05/24.
- Hosted the UCD/UX Check-in on 03/06/24.
- Hosted a SCERFRA 24-905 Discussion on 03/06/24.
- Attended the EBT 2259 and CF 303 County Demo Prep on 03/06/24.
- Attended the EBT 2259 County Demo on 03/06/24.
- Attended the GCF Parity Meeting on 03/06/24.
- Attended the Case Linking MFA Flow Walkthrough on 03/07/24.
- Attended the SAR 7 and SAR 7a Implementation Planning Meeting on 03/07/24.
- Hosted the BenefitsCal Enhancement Pipeline Meeting on 03/08/24.

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 design work for the April 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.

- Attend the Disaster CalFresh Planning Meetings on 03/11/24, 03/12/24, 03/13/24, and 03/14/24.
- Host the BenefitsCal CWDA Check-Ins on 03/11/24 and 03/18/24.
- Host the Prep for UCD Monthly Meeting on 03/11/24.
- Attend the 24.03 Project Readiness T-2 Meeting on 03/11/24.
- Host the DDI and M&O Biweekly calls on 03/12/24, 03/14/24, 03/19/24, and 03/21/24.
- Attend the CalSAWS Security Incident Follow-up with Advocates on 03/12/24.
- Attend the BenefitsCal QR Code and Messaging for SAR 7 Meeting on 03/12/24.
- Attend the CFAP Expansion Meeting on 03/12/24.
- Attend the UCD Monthly Meeting with State Partners and Advocates on 03/13/24.
- Host the BenefitsCal PM Stand-Up Meetings with the Consortium on 03/13/24 and 03/20/24.
- Attend an ABAWD (Able-Bodied Adults Without Dependents Timeline Discussion on 03/13/24.
- Host a SCERFRA Touchpoint on 03/13/24.
- Attend the ROI Work Group on 03/18/24.
- Attend the 24.03 Project Readiness T-1 Meeting on 03/18/24.
- Attend the CAPI (Cash Assistance Program for Immigrants) Automation Workgroup on 03/19/24.
- Attend the Quarterly Stakeholder Meeting on 03/20/24.
- Attend the BenefitsCal Collaboration Model Meeting on 03/22/24.
- Host a BenefitsCal Enhancement Pipeline Discussion on 03/22/24.

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.
  - Reviewed and updated FWP (Final Work Product) 24.22: CX Report (December 2023/January 2024) report based on comment log feedback.
  - Analyzed February data for the Always on survey.
- **User Engagement**
  - Conducted generative research sessions with customers for Customer Dashboard [CSPM-68213].
  - Conducted generative research sessions with county staff members from Sacramento, El Dorado, Santa Cruz, and Tulare Counties for Customer Dashboard [CSPM-68213].
  - Conducted usability testing session with customers for Case Linking [CSPM-68111].

- Conducted a usability testing session with customers for MFA Language Test.

- **Enhancements**
  - Conducted generative research sessions for Customer Dashboard [CSPM-68213].
  - Finished synthesis on Keep Your Records [CSPM-68112].
  - Finished design for Doc Type/Upload [CSPM-67785]
  - Began research for Email Notification [CSPM-67104].
  - Began designs for MFA Case Linking [CSPM-68189]
  - Continue usability testing on MFA Language Test.
  - Conducted usability testing sessions for Case Linking Help Text [CSPM-68111].
- **Advocate Engagement**
  - Responded to comment log responses to feedback for the February UCD monthly meeting.
  - Prepped for the March 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 March Always On survey data.
- **User Engagement**
  - Recruit customers for Household Tax Section Drop-Off [CSPM-71943].
  - Continue usability testing session with customers for Case Linking [CSPM-68111].
  - Continue usability testing session with customers for MFA Language Test.
  - Conduct generative research with customers for Customer Dashboard [CSPM-68213].
- **Enhancements**
  - Conduct generative research with customers for Customer Dashboard [CSPM-68213].
  - Finalize synthesis for Customer Dashboard [CSPM-68213].
  - Recruit stakeholders for generative research sessions on Email Notification [CSPM-67104].
  - Plan and prep for Household Tax Section Drop-Off [CSPM-71943].
  - Finalize Case Linking Help Text [CSPM-68111].
  - Finalize MFA Language Test.
- **Advocate Engagement**
  - Facilitate the March UCD monthly meeting.

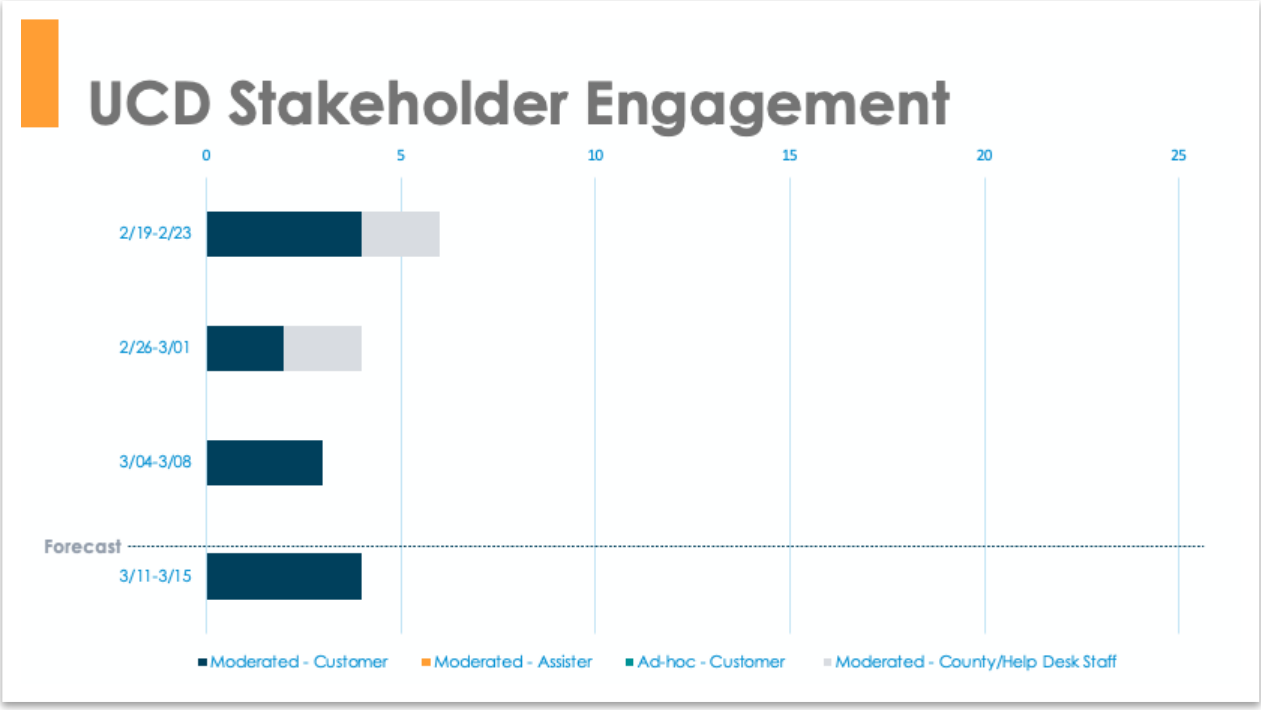


Figure 2.1-1 – UCD Stakeholder Engagement

2.2 Development

2.2.1 Highlights of the Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending - 03/08/24	Actual for Week Ending 03/08/24	Total Planned for the Release	Comments
Release 24.02.29	2	2	2	Release 24.02.29 was deployed to Production on 02/29/24.
Release 24.03.21	1	0	1	CSPM-71735. Development is currently in progress.

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 03/22/24	Total Planned for the Release	Total Completed for the Release	Comments
Release 24.02.29	2	2	2	Release 24.02.29 was deployed to Production on 02/29/24.

Release	Planned for Week Ending 03/22/24	Total Planned for the Release	Total Completed for the Release	Comments
Release 24.03.25	3	3	3	Time Clock, EBT2259 and CF303 development completed.
Release 24.03.21	1	1	0	CSPM-71735. Development is currently in progress.

Table 2.2-2 – Planned Enhancement Work

Unscheduled Release Updates

- **Chatbot**
  - The AWS (Amazon Web Services) 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 March 2024.
- **Time Clock**
  - The Time Clock and EBT2259/CF303 release is planned for 03/25/24.
  - SSA form development release is planned for 05/23/24.

2.3 System Test Execution

2.3.1 Highlights of the Reporting Period – System Test Execution

- **Release 24.02.29 – February Monthly Release**
  - Deployed the February Monthly into Production on 02/29/24.
- **Release 24.03.07 – March Priority Release**
  - Deployed the March Priority Release for hiding the case linking hyperlinks on the customer dashboard on 03/07/24.
- **Release 24.03.25 – March Monthly Release**
  - Continued Test Execution for the March Monthly Release – Time Clock, CF 303 and EBT 2259. Co-ordinated with the partners for any E2E validation.

2.3.2 Activities for the Next Reporting Period – System Test Execution

- **Release 24.03.25 – March Monthly Release**
  - Continue Test Execution for the March Monthly Release – Time Clock, CF 303, and EBT 2259. Coordinate with the partners for E2E validation.
- **Release 24.03.12 – March Emergency Release**
  - Deploy the Silent Token Implementation in Production on 03/12/24.

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 24.03.25 – March Monthly Release**
  - The BenefitsCal Team has successfully completed scripting for four (4) new scenarios for the March release performance test scope. The team also incorporated and validated data set shared by CalSAWS team based on their database refresh activity. However, due to the WAF (web application firewall) rule implementation in the ForgeRock lower environments, the performance scripts are failing the authentication, and the planned tests could not be executed this week. The BenefitsCal Performance Testing Team is working with ForgeRock to make the BenefitsCal PERF test users work with these new WAF rules and will execute the test in the next contingency weeks.

Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	02/19/24	03/15/24	Release 24.03.25 – March Priority Release	**Scope**: BenefitsCal March 2024 has three (3) major enhancements (**Time Clock**, **CF303** and **EBT2259**) implementation. This release requires four (4) new PERF scripts development along with rescripting existing 30 scenarios to incorporate Case details API changes. **Executions**: BenefitsCal Integrated Load tests with CalSAWS/Hyland: Week ending 03/01/24 – New scripts and existing scripts data validations. (**Partially Completed**) Week ending 03/08/24 – 100% volume load tests Cycle 1 and 2. (**Not completed**) Week ending 03/15/24 – Contingency week will be utilized for 100% volume tests.	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 03/01/24 and 03/08/24.
- **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 03/08/24.
- **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 02/27/24 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 (Shared Services & Outsourcing) 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	02/19/24	02/29/24	03/05/24
25.25	BenefitsCal Monthly M&O Report – February 2024	03/11/24	03/21/24	03/25/24
26.07	BOM Review and License Renewal (Quarterly) Oct – Dec 2023	N/A	01/05/24	01/16/24
28.22	BenefitsCal Work Plan Monthly Updates – January 2024	N/A	02/07/24	02/16/24
28.23	BenefitsCal Work Plan Monthly Updates – February 2024	N/A	03/07/24	03/18/24
29.22	BenefitsCal Monthly Status Report – January 2024	N/A	02/07/24	02/16/24
29.23	BenefitsCal Monthly Status Report – February 2024	N/A	03/07/24	03/18/24

Table 6.1-3 – Upcoming Work Product Deadlines

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
25.25	BenefitsCal Monthly M&O Report – February 2024	On Track	DWP submission 03/11/24 FWP submission 03/21/24 FWP approval 03/25/24
28.23	BenefitsCal Work Plan Monthly Updates – February 2024	On Track	FWP submitted 03/07/24 FWP approval 03/18/24
29.23	BenefitsCal Monthly Status Report – February 2024	On Track	FWP submitted 03/07/24 FWP approval 03/18/24

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. February 9, 2024: • Items #9, #19, and #63 implemented and deployed to production with January 24.01 release. • Working sessions were conducted on 02/07/2023. Premise budget planning discussions continued for the 5 items where the estimates were provided by BenefitsCal and CalSAWS teams. • Working with CDSS, Consortium and CWDA for the remaining 4 items pending CFA to confirm final disposition and next steps.				

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. February 9, 2024: • Most recent working session held on 02/05/24. Team provided a demonstration of the ROI functionality in BenefitsCal and CalSAWS (based on the original design). Working with the Stakeholders on applicant/recipient roles/responsibilities;(e.g., Authorized Representatives, Power of Attorney, CBOs, etc.); matrix, which addresses Medi-Cal, CalFresh and CalWORKs programs completed, will be included in future Errata or state letter by both DHCS and CDSS. Additional chart for responsibilities in progress to cover scenarios when contracts in place or not. This chart is to be included in future letter. • Next meeting dates scheduled: 3/4/2024, 3/18/2024 and 4/8/2024.				

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
0027-24	PPOCs (All); Imaging Committee (All)	CalSAWS Imaging – Re-Enablement of Imaging OCR for BenefitsCal Document Uploads	CalSAWS M&E	02/26/24	Rhiannon Chin	Darcy Alexander
0030-24	Notify.All; usbenefitscaldevops@deloitte.com; operator@calheers.ca.gov; HoweG@CalSAWS.org; QuijadaP@CalSAWS.org; TombakianM@CalSAWS.org; tech.productionoperations@calsaws.org;Bill.Kelly@fisglobal.com;CalSAWS.All	Scheduled CalSAWS Maintenance - System Downtime Notification – 3/10/2024	CalSAWS M&E	02/27/24	Anand Kulkarni	Pete Quijada
0034-24	Notify.All; usbenefitscaldevops@deloitte.com; operator@calheers.ca.gov; HoweG@CalSAWS.org; QuijadaP@CalSAWS.org; TombakianM@CalSAWS.org; tech.productionoperations@calsaws.org;Bill.Kelly@fisglobal.com;CalSAWS.All	Scheduled CalSAWS Maintenance - System Downtime Notification – 3/24/2024	CalSAWS M&E	03/06/24	Anand Kulkarni	Pete Quijada

Table 6.3-1 – CITs

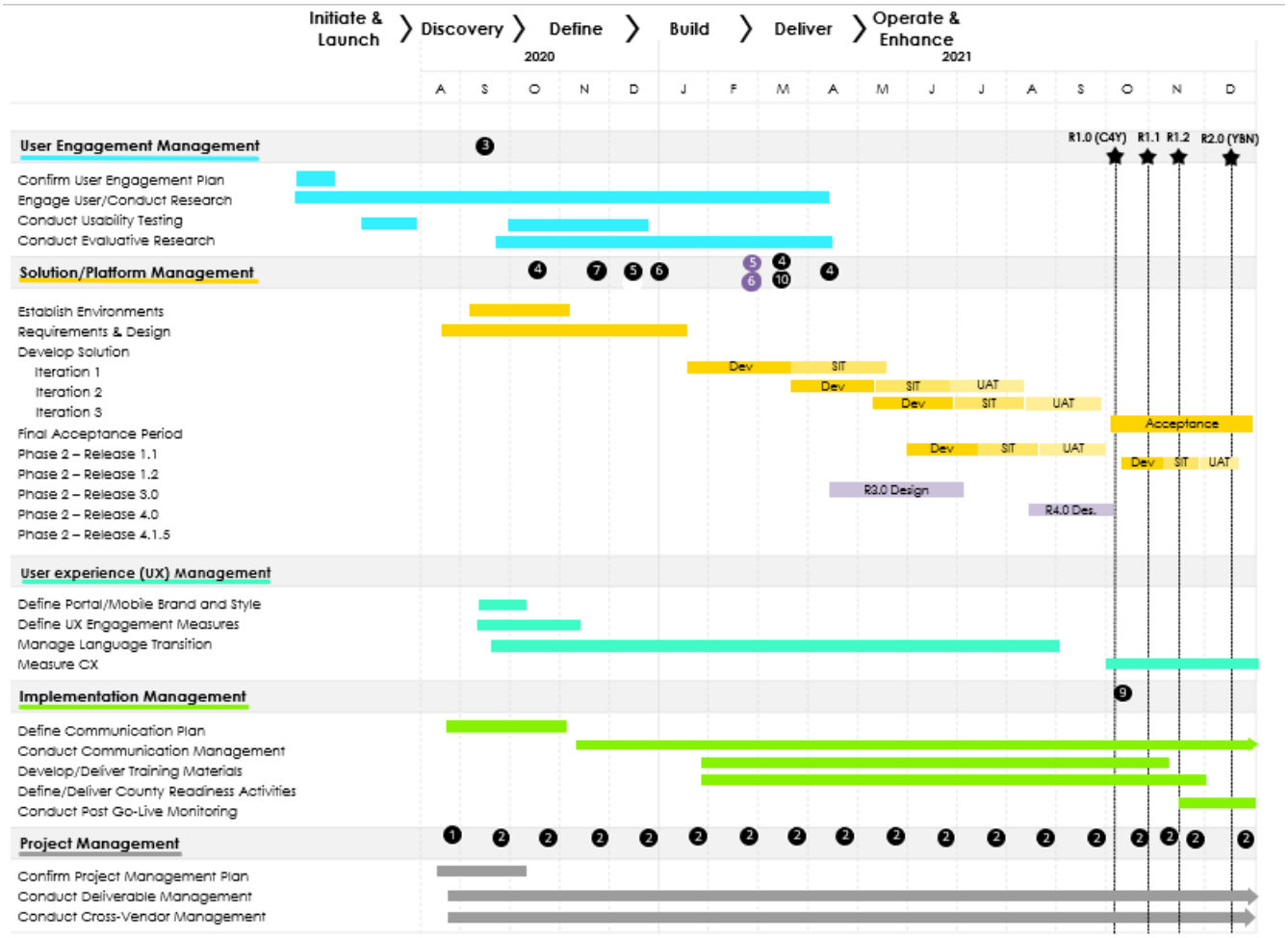
The following table outlines CalSAWS Requests for Information (CRFIs) distributed or with a response due date within the reporting period.

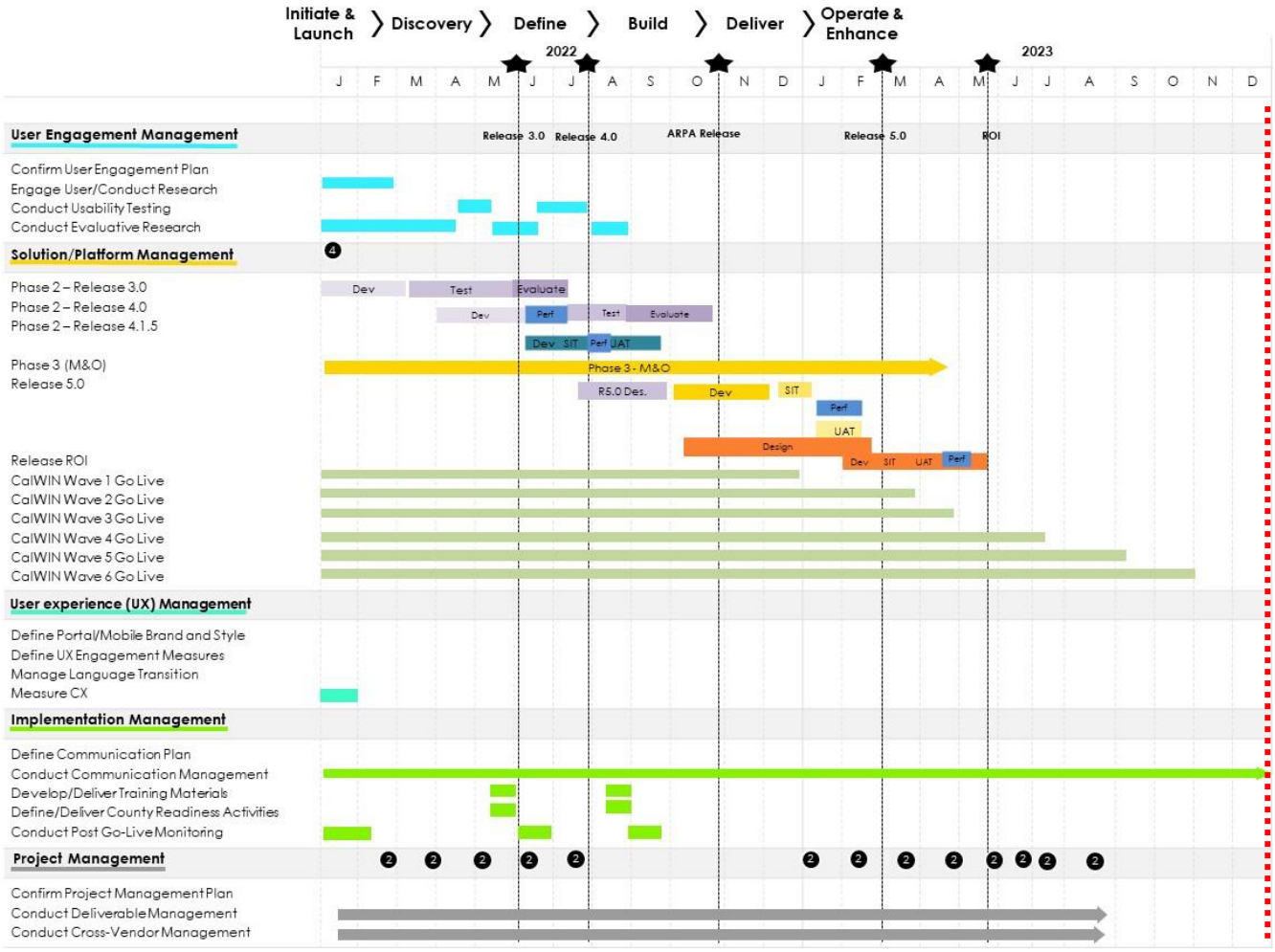
CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary BenefitsCal Contact	Backup BenefitsCal Contact
None.							

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