

CalSAWS BenefitsCal
(Portal/Mobile) Biweekly
Status Report

Reporting Period: March 25, 2024 to April 7, 2024

CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

Weekly Status Report, April 7, 2024

Period: March 25, 2024 to April 7, 2024

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
April Enhancements (Release 24.04)	<ul style="list-style-type: none"> ➤ Four (4) enhancements will be deployed to production across multiple releases in April 2024 including: <ul style="list-style-type: none"> ○ One (1) Collaboration Model Enhancement <ul style="list-style-type: none"> ▪ CSPM-67785: Update Document Type/ Upload feature ○ Three (3) Security Enhancements <ul style="list-style-type: none"> ▪ CSPM-68189: Enable Case Linking functionality ▪ CSPM-71739: Redacted App Summary PDF for Customers ▪ CSPM-71737: Encode all BenefitsCal API calls with Base64 Encoding
May Enhancements (Release 24.05)	<ul style="list-style-type: none"> ➤ Nine (9) enhancements will be deployed to production across multiple releases in April 2024 including: <ul style="list-style-type: none"> ○ One (1) Collaboration Model Enhancements <ul style="list-style-type: none"> ▪ CSPM-68111: Collaboration Model: Display Help Text for Customers when Case does NOT link automatically ○ Three (3) Security Enhancements <ul style="list-style-type: none"> ▪ CSPM-71920: Additional improvements for Case Linking functionality ▪ CSPM-71734: Change FR Integration Points ▪ CSPM-71736: Enable Google Captcha to prevent Bot Attacks ○ Two (2) Technical Enhancements <ul style="list-style-type: none"> ▪ CSPM-66508: Modify the page architecture of the Help Center FAQs so each category has its own unique page URL. ▪ CSPM-73249: Update Person Level Flag for Highlighted Documents to “No” ○ Two (2) Policy Enhancements <ul style="list-style-type: none"> ▪ CSPM-67651: Implementation of SSA Assisted Apps in BenefitsCal ▪ CSPM-73247: Add SSA User Guide for SSA Applications flow ○ One (1) Testing Only Enhancement <ul style="list-style-type: none"> ▪ CSPM-71667: Add the Special Circumstance Icon to the e-Application Summary page

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STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
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 March Always-on data. ➤ User Engagement <ul style="list-style-type: none"> ○ Conducted generative research sessions with customers for Duplicate Application [CSPM-65131]. ○ Conducted generative research sessions with customers and CBOs for HH Medical Renewal [CSPM-68213]. ○ Conducted county staff focus groups for HH Medical Renewal [CSPM-68213]. ○ Conducted generative research sessions with county staff members from Shasta, Tulare, Orange for Duplicate Application [CSPM-65131]. ○ Conducted usability testing sessions with customers for MFA case linking [CSPM-68189] ○ Conducted usability testing session with customers for Deactivated Account Message for Customers [CSPM-73248] ➤ Enhancements <ul style="list-style-type: none"> ○ Conducted generative research sessions for HH Medical Renewal [CSPM-68213]. ○ Conducted generative research sessions for Duplicate Application [CSPM-65131]. ○ Conducted usability testing sessions with customers for MFA case linking [CSPM-68189] ○ Conducted usability testing session with customers for Deactivated Account Message for Customers [CSPM-73248] ○ Finalize synthesis for Household Section on Medical Renewal [CSPM-71943]. ○ Design updates on Chatbot ➤ Advocate Engagement <ul style="list-style-type: none"> ○ Planned and prepped for April UCD monthly meeting.

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STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
GetCalFresh (GCF) Parity List	<ul style="list-style-type: none"> ➤ The most recent 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 (CF-303) is delivered with the March 24.03 baseline release. ➤ Item #20 (SSA Assisted Apps) is on schedule to be delivered with the the May 24.05 baseline release (Development Completed; SIT In Progress) ➤ 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

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1.2 PMO

1.2.1 Highlights of the Reporting Period

➤ **Deliverables and Work Products submitted:**

- FWP 26.08: BOM Review and License Renewals (Quarterly) Jan – Mar 2024 on 04/08/24.
- FWP 27.08: Certificate Review (Quarterly) Jan – Mar 2024 on 04/08/24.
- FWP 28.24: BenefitsCal Work Plan Monthly Updates – March 2024 on 04/05/24.
- FWP 29.24: BenefitsCal Monthly Status Report – March 2024 on 04/05/24.

1.2.2 Activities for the Next Reporting Period

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

- DWP 24.23: CX Bimonthly Report (Feb/Mar 2024) on 04/10/24.
- DWP 25.26: Monthly M&O Report – March 2024 on 04/09/24.

1.3 BenefitsCal Collaboration Model (CM)

1.3.1 Highlights of the Reporting Period

- Prioritization In Progress for items prioritized in 2023 Quarter 3 and Quarter 4. (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-71555	BenefitsCal Email Notifications	In Progress	Research in progress with the 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.
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.

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Issue Type	ID	Summary	Status	Update this Week
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 June 2024.

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-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
Enhancement	CSPM-67785	Update Document Type/ Upload feature	Finish Testing & Provide UAT Support	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 working with the development and testing teams on the March and April 2024 enhancements.
- Continued working with the development and testing teams on the SSA (Social Security Administration) Application on BenefitsCal enhancement CSPM-65292.
- Hosted the BenefitsCal CWDA Check-Ins on 03/25/24 and 04/01/24.
- Hosted the DDI and M&O Biweekly calls on 03/26/24, 03/28/24, 04/02/24, and 04/04/24.
- Attended the CalSAWS Security Incident Follow-up with Advocates on 03/26/24.
- Co-hosted SCERFRA/SIRFRA meeting with CalSAWS on 03/26/24 and 04/02/24.
- Attended the CFAP Expansion Meeting on 03/26/24.
- Hosted the Chatbot Recommendation Review with Consortium on 03/27/24.
- Attended EBT 2259 User Group meeting on 03/27/24.
- Hosted the BenefitsCal PM Stand-Up Meetings with the Consortium on 03/27/24 and 04/03/24.
- Attended the Self-Service Portal Committee meeting on 04/02/24.
- Attended WIC display on BenefitsCal meeting with WIC team and OTSI on 04/04/24.
- Attended the SCERFRA 24-904 meeting with Consortium and CalSAWS on 04/04/24.
- Hosted security discussion for SSA flow on BenefitsCal with Consortium security on 04/04/24.

➤ **Designs and Design Meetings**

- Continue design work for the April and May 2024 enhancements.
- Continue working with the development and testing teams on the SSA (Social Security Administration) Application on BenefitsCal enhancement CSPM-65292.
- Host the UCD Prep Call with CWDA, Consortium and State Partners on 04/08/24.
- Host the BenefitsCal CWDA Check-Ins on 04/08/24 and 04/15/24.
- Host the DDI and M&O Biweekly calls on 04/09/24, 04/11/24, 04/16/24, and 04/18/24.
- Host SCERFRA Touchpoints on 04/09/24 and 04/16/24.
- Attend the CalSAWS Security Incident Follow-up with Advocates on 04/09/24.
- Attend the CFAP Expansion Meeting on 04/09/24.
- Host the April 2024 UCD monthly meeting on 04/10/24.

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- Host the BenefitsCal PM Stand-Up Meetings with the Consortium on 04/10/24 and 04/17/24.
- Attend the 24.05 County Validation touchpoint call on 04/15/24, 04/16/24, 04/17/24, 04/18/24 and 04/19/24.
- Attend the CAPI automation workgroup call on 04/16/24.
- Attend the FNS Demo for BenefitsCal CalFresh Application on 04/17/24.
- Host a BenefitsCal Enhancement Pipeline Discussion on 04/19/24.

2.1.2 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 March Always-on data.

➤ User Engagement

- Conducted generative research sessions with customers for Duplicate Application [CSPM-65131].
- Conducted generative research sessions with customers and CBOs for HH Medical Renewal [CSPM-68213].
- Conducted county staff focus groups for HH Medical Renewal [CSPM-68213].
- Conducted generative research sessions with county staff members from Shasta, Tulare, Orange for Duplicate Application [CSPM-65131].
- Conducted usability testing sessions with customers for MFA case linking [CSPM-68189]
- Conducted usability testing session with customers for Deactivated Account Message for Customers [CSPM-73248]

➤ Enhancements

- Conducted generative research sessions for HH Medical Renewal [CSPM-68213].
- Conducted generative research sessions for Duplicate Application [CSPM-65131].
- Conducted usability testing sessions with customers for MFA case linking [CSPM-68189]
- Conducted usability testing session with customers for Deactivated Account Message for Customers [CSPM-73248]
- Finalized synthesis for Household Section on Medical Renewal [CSPM-71943].
- Design updates on Chatbot

➤ Advocate Engagement

- Prepared for April UCD monthly meeting.

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2.1.3 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.

➤ **User Engagement**

- Recruit CBOs for CBO Support Assistance [CSPM-71551].
- Conduct generative research with stakeholders for CBO Support Assistance [CSPM-71551].
- Conduct generative research sessions with stakeholders for Duplicate Application [CSPM-65131].

➤ **Enhancements**

- Conduct generative research for CBO Support Assistance [CSPM-71551].
- Conducted generative research sessions for Duplicate Application [CSPM-65131].
- Finalize synthesis for Duplicate Application [CSPM-65131].
- Continue work on Email Notification [CSPM-71555].
- Continue design on Chatbot.
- Finalize design for MFA Case Linking [CSPM-68189].
- Finalize design for Deactivated Account Message for Customers [CSPM-73248]

➤ **Advocate Engagement**

- Facilitate April UCD monthly meeting.
- Send out comment log for Advocate feedback.

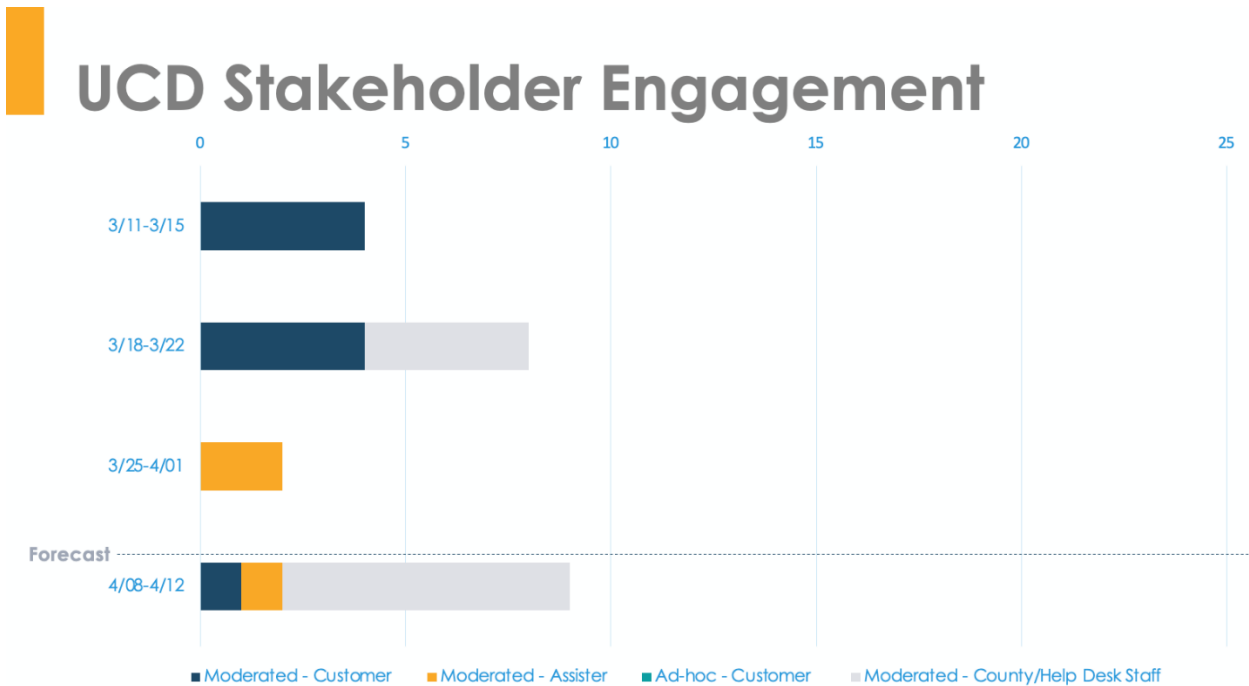


Figure 2.1-1 – UCD Stakeholder Engagement

2.2 Development

2.2.1 Highlights of the Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 04/05/24	Actual for Week Ending 04/05/24	Total Planned for the Release	Comments
Release 24.03.29	2	2	2	CSPM-72311 & CSPM-72251 were deployed to Production as part of Release 24.03.29 on 03/29/24.
Release 24.04.25	1	2	2	CSPM-68189 and CSPM-67785 are planned for Release 24.04.25.

Table 2.2-1 – Enhancement Actuals for Reporting Period

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2.2.2 Activities for the Next Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 04/05/24	Total Planned for the Release	Total Completed for the Release	Comments
Release 24.04.25	1	2	0	CSPM-68189 and CSPM-67785 are planned for Release 24.04.25.
Release 24.05.23	0	1	1	(SSA Form) CSPM-67651 is planned for Release 24.05.23

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.

2.3 System Test Execution

2.3.1 Highlights of the Reporting Period – System Test Execution

➤ Release 24.03.25 – March Emergency Release

- Deployed the Appointments Issue into Production on 03/25/2024.

➤ Release 24.03.29 – March Priority Release

- Deployed the enhancement related to introducing the nudges and removing the sentence from the homepage into Production on 03/29/2024.

2.3.2 Activities for the Next Reporting Period – System Test Execution

➤ Release 24.04.11 – April Priority Release

- Deploy the Redaction enhancement + deactivation enhancement into Production on 04/11/24.

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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 24.04.25 – April Monthly Release**
 - The BenefitsCal team has identified the scope of the April release performance testing and One (1) major enhancement related to payload change in all document upload scripts need to be tested. The team will plan the scripts enhancements based on the April release code/build migration to Performance environment and execute the mock services isolated performance test as per the plan below.

Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	03/25/24	04/19/24	Release 24.04.25 – April Monthly Release	Scope: BenefitsCal April '24 monthly release has 1 major enhancement implementation. All documents upload scripts to incorporate the Notes information in the payload. No new Perf scripts development is anticipated for this release. Executions: BenefitsCal isolated Load tests with mock services: Wednesday, April 10th Friday, April 12th	40%

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

4.0 Security

4.1 User Conversion

4.1.1 Highlights of the Reporting Period – User Conversion Testing

- No updates for this reporting period.

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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 03/29/24 and 03/05/24.

➤ 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 04/05/24.

➤ 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 04/02/24 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 and 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.

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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	
24.23	CX Bimonthly Report (Feb/Mar 2024)	04/10/24	04/22/24	05/01/24	
25.25	BenefitsCal Monthly M&O Report – February 2024	03/11/24	03/21/24	04/01/24	
25.26	BenefitsCal Monthly M&O Report – March 2024	04/09/24	04/22/24	04/29/24	
26.08	BOM Review and License Renewals (Quarterly) Jan – Mar 2024	N/A	04/08/24	04/16/24	
27.08	Certificate Review (Quarterly) Jan – Mar 2024	N/A	04/08/24	04/16/24	
28.24	BenefitsCal Work Plan Monthly Updates – March 2024	N/A	04/05/24	04/16/24	
29.24	BenefitsCal Monthly Status Report – March 2024	N/A	04/05/24	04/16/24	

Table 6.1-3 – Upcoming Work Product Deadlines

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Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
24.23	CX Bimonthly Report (Feb/Mar 2024)	On Track	DWP submission 04/10/24 FWP submission 04/22/24 FWP approval 05/01/24
25.26	BenefitsCal Monthly M&O Report – March 2024	On Track	DWP submission 04/09/24 FWP submission 04/22/24 FWP approval 04/29/24
26.08	BOM Review and License Renewals (Quarterly) Jan – Mar 2024	On Track	FWP submitted 04/08/24 FWP approval 04/16/24
27.08	Certificate Review (Quarterly) Jan – Mar 2024	On Track	FWP submission 04/08/24 FWP approval 04/16/24
28.24	BenefitsCal Work Plan Monthly Updates – March 2024	On Track	FWP submission 04/05/24 FWP approval 04/16/24
29.24	BenefitsCal Monthly Status Report – March 2024	On Track	FWP submission 04/05/24 FWP approval 04/16/24

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 				

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		<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) are 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. <p>January 12, 2024:</p> <ul style="list-style-type: none"> • Working sessions was conducted on 01/10/2023. There are 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. <p>February 9, 2024:</p> <ul style="list-style-type: none"> • 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. <p>March 8, 2024:</p> <ul style="list-style-type: none"> • A working session was conducted on 03/06/24 with the CDSS, Consortium, and CWDA on Premise funding for implementation timeline. • 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) 				

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		<ul style="list-style-type: none"> • Provided estimates to the CDSS for one (1) parity item #34 in March 2024. • Item #31 is on track for March 24.03 release. • Item #20 is on schedule for May 24.05 release. 				
290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers	<p>Recently issued Release of Information (ROI) policy is not detailed enough, nor is it consistent between the two state Departments (CDSS and DHCS). The policy as written may create customer information privacy/security, safeguard and county operations concerns, and liabilities. As the policy was released after the completion of ROI design, development, and testing of the functionality in BenefitsCal and CalSAWS, counties have not had sufficient time to assess the ROI functionality with the high-level policy and to be able to determine impacts to their county operations and the associated alignment with the existing BenefitsCal/CalSAWS design. The policy as written does not give clear direction on County responsibilities associated with the establishment of CBO agreements, provisions of those agreements and monitoring of CBO compliance with the agreements. Counties also have not had sufficient time to be able to determine if their current CBO agreement language is adequate and includes provisions and protections to further protect customer information when being accessed by CBOs via BenefitsCal. BenefitsCal/CalSAWS initial design and implementation has been postponed until final/revised policy is issued by both CDSS and DHCS and there is operational clarity agreed to by all parties.</p> <p>June 16, 2023:</p> <ul style="list-style-type: none"> • Responded to SIRFRA 1270/1271 regarding Expanding the Release of Information Feature with set of questions to DHCS from BenefitsCal, CalSAWS, and CWDA on 06/12/23. <p>June 30, 2023:</p> <ul style="list-style-type: none"> • Risk was reduced to probability of 30% which brings it to an overall medium level. State partners to 	Open	Medium	High	05/19/23

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		<p>confirm the topics and agenda items for the workgroup discussions. Topic was also covered during the June JPA Board meeting on 06/29/23.</p> <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 08/14/23. 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 09/11/23 as a working session. <p>September 22, 2023:</p> <ul style="list-style-type: none"> ROI Workgroup met on 09/11/23 and 09/18/23. Group discussed policy questions and clarifications. Next meeting scheduled for 10/02/23, 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. <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 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>responsibilities matrix as well as the liability and contract spectrum of the Next workgroup meeting is scheduled on 12/04/23.</p> <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. <p>February 9, 2024:</p> <ul style="list-style-type: none"> • 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: 03/04/24, 03/18/24, and 04/08/24. <p>March 8, 2024:</p> <ul style="list-style-type: none"> • Workgroup session conducted on 03/04/24 with the Stakeholders. • DHCS/CDSS have created two draft charts for the workgroup to review. • User roles for ROI in BenefitsCal– accessing information and 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		Responsibilities – in the event a breach or security incident. <ul style="list-style-type: none"> • Additionally, during the last workgroup meeting, milestones needed to determine the implementation timeline has been discussed. • Next work group meetings are planned for 03/18/24, and 04/08/24. 				

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
0049-24	PPOCs (All), Self-Service Portal Committee (All), Regional Managers (All)	BenefitsCal CBO Accounts and County Delegated Admin	CalSAWS M&E	04/02/24	Joel Acevedo	Pete Quijada
0051-24	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	Scheduled CalSAWS Maintenance - System Downtime Notification – 4/14/2024	CalSAWS M&E	04/04/24	Art Robles	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

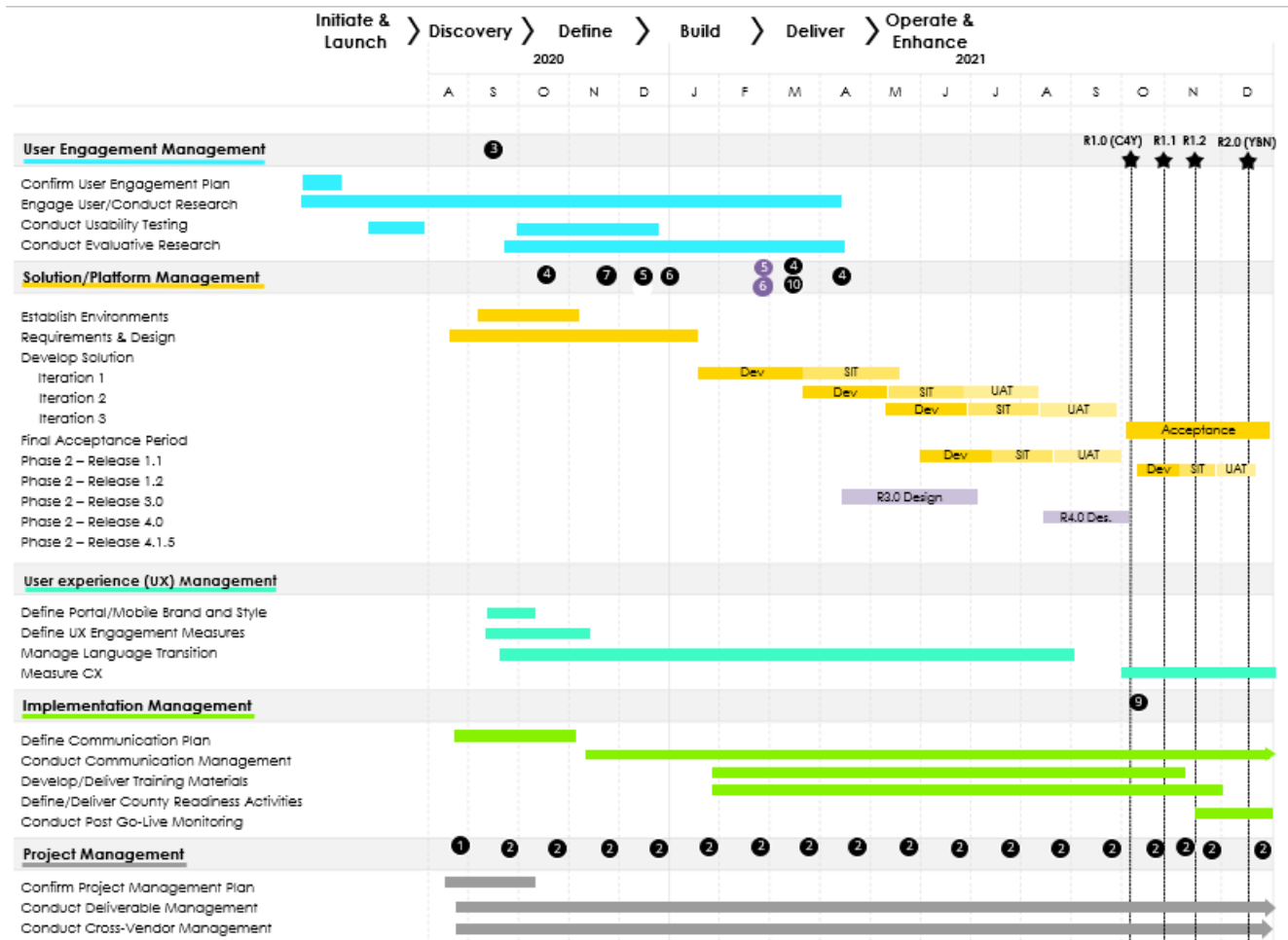
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6.4 Appendix C – Project Work Plan Reports

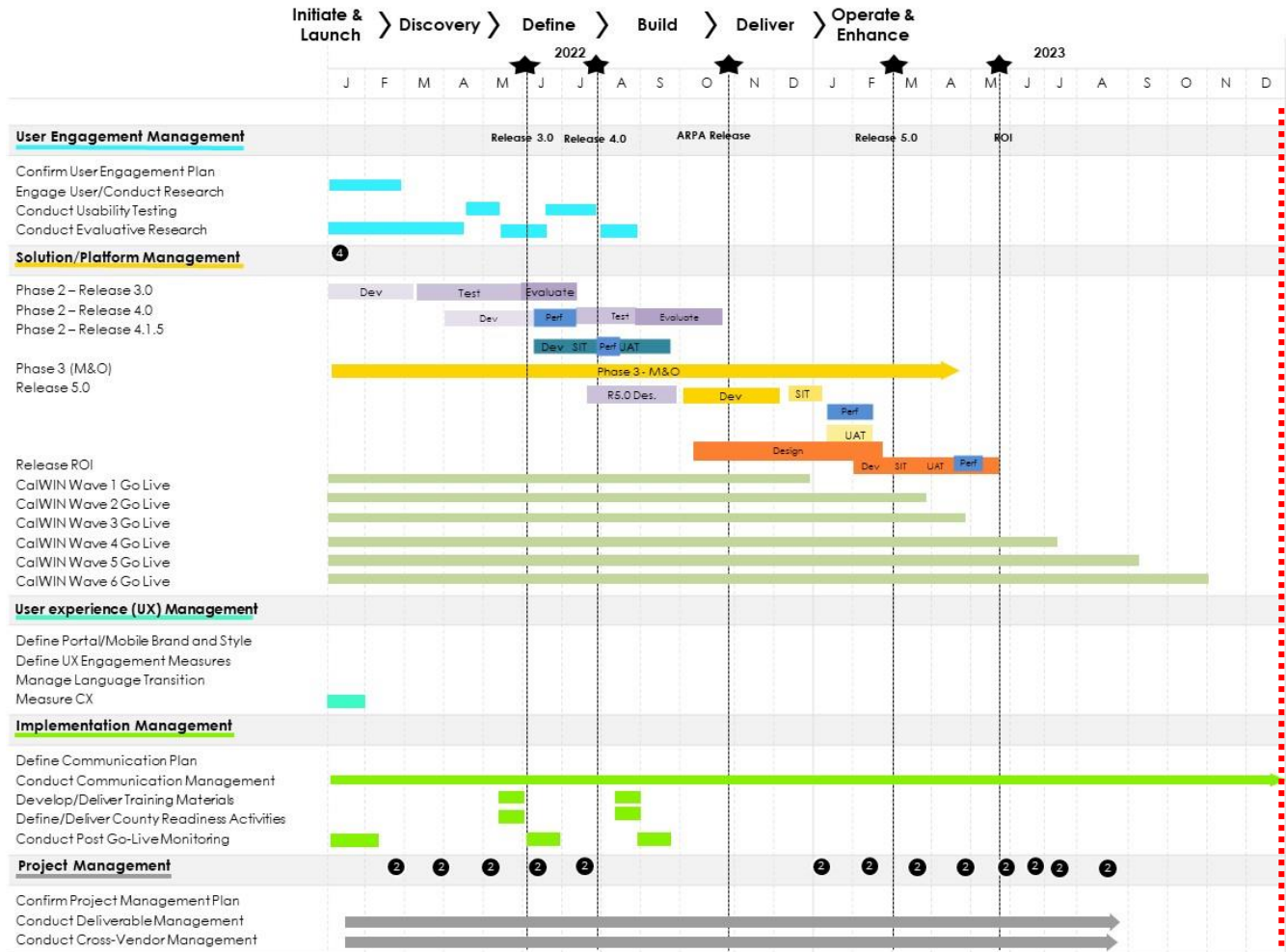
Project Timeline



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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