

CalSAWS BenefitsCal (Portal/Mobile) Biweekly Status Report, Maintenance and Operations (M&O) Combined

Reporting Period: May 20, 2024 to June 2, 2024

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1.0 Executive Summary

1.1 Executive Summary Agenda Topics

| STATUS REPORT SUBSECTION | STATUS AGENDA TOPIC |
|---|--|
| 3.5.1 | BenefitsCal Monthly Release 24.04.25 on 04/25/24 |
| 4.2 | Upcoming BenefitsCal Priority Release 24.05.19 on 05/19/24 |
| 4.2 | Upcoming BenefitsCal Monthly Release 24.05.30 on 05/30/24 |
| May Enhancements (Release 24.05.30) | <ul style="list-style-type: none"> ➤ Ten (10) enhancements were deployed to Production across multiple releases in May 2024 including: <ul style="list-style-type: none"> ○ One (1) Collaboration Model Enhancement <ul style="list-style-type: none"> ▪ CSPM-68111: Collaboration Model: Display Help Text for Customers when Case does NOT link automatically. ○ Two (2) Security Enhancements <ul style="list-style-type: none"> ▪ CSPM-71920: Additional improvements for Case Linking functionality. ▪ CSPM-73623: Add/Update Login FAQs to the Help Center. ○ Four (4) Policy Enhancements <ul style="list-style-type: none"> ▪ CSPM-67651: Implementation of SSA Assisted Apps in BenefitsCal – Deployed with 24.05.19 Release. ▪ CSPM-73247: Add SSA User Guide for SSA Applications flow. ▪ CSPM-73689: SSA Web Page for SSA Metrics. ▪ CSPM-74060: Update the CW 42 form to download from BenefitsCal to the new 09/23 version ACL 23-83. ○ Three (3) Testing Only Enhancements <ul style="list-style-type: none"> ▪ CSPM-71667: Add the Special Circumstance Icon to the e-Application Summary page. ▪ CSPM-73696: Configurable Task Categories for Task Management. ▪ CSPM-73697: Test Only: Update Medi-Cal RE Packets Variable Population Logic. |
| June Enhancements (Release 24.06.27) | <ul style="list-style-type: none"> ➤ Seven (7) enhancements will be delivered to Production in June 2024 across multiple releases: <ul style="list-style-type: none"> ○ One (1) Security Enhancement: <ul style="list-style-type: none"> ▪ CSPM-71734: Change Integration Points for all ForgeRock APIs – Will be delivered with a Priority Release on 06/13/24. ○ One (1) Collaboration Model Enhancement: <ul style="list-style-type: none"> ▪ CSPM-68269: Collaboration Model: Display Race Options in Alphabetical Order. ○ One (1) Partner Support Enhancement: |

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|---|--|
| | <ul style="list-style-type: none"> ▪ CSPM-73249: Technical: Update Person Level Flag for Highlighted Documents to "No." ○ Two (2) Policy Enhancements: <ul style="list-style-type: none"> ▪ CSPM-71517: Add the CF 385 (Application for Disaster CalFresh) to Forms API. ▪ CSPM-72205: Allow customers to submit SAR 7 in BenefitsCal as soon as it's generated instead of first of the next month. ○ Two (2) Production Priority Enhancements: <ul style="list-style-type: none"> ▪ CSPM-69823: Chatbot – Reenable See IF I qualify. ▪ CSPM-73717: Update the YouTube MCRE How To video to remove Asset section. |
| OCM Activities to Case Linking MFA functionality with SMS channel | <ul style="list-style-type: none"> ➤ Hypercare Support <ul style="list-style-type: none"> ○ Daily Calls with Counties after implementation (05/31/24 – 06/06/24). ➤ Recorded Training sessions with Counties and CBOs. <ul style="list-style-type: none"> ○ Case link MFA – County Staff Training (05/20/24). ○ Case link MFA – CBO Awareness Webinar (05/21/24). ➤ Completed the below items for the 05/30/24 implementation: <ul style="list-style-type: none"> ○ Website updates to support customer communication. <ul style="list-style-type: none"> ▪ FAQs for Case link MFA feature – (BenefitsCal.com) ▪ New YouTube Video – (BenefitsCal YT Channel). ▪ Announcement (BenefitsCal.com) ○ Communication tools for Counties, CBOs, and Customers <ul style="list-style-type: none"> ▪ Informational Flyer (CalSAWS.org/BenefitsCal) ▪ FACT Sheet (CIT 0081-24) ▪ Quick Reference Guide (CalSAWS.org/BenefitsCal) ▪ Job Aid (CIT 0078-24) ○ Twitter Message (CalSAWS.org/BenefitsCal) |
| 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 data from Always-on survey for the month of April. ➤ User Engagement <ul style="list-style-type: none"> ○ Conducted generative research sessions with CBOs for CBO Support Assistance [CSPM-71551]. ○ Conducted usability testing sessions with customers for Case Link Verification II [CSPM-71920]. ○ Recruited county workers for ABAWD ACL [CSPM-73600]. |




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|--------------------------|---|
| | <ul style="list-style-type: none"> ➤ Enhancements <ul style="list-style-type: none"> ○ Conducted generative research sessions for CBO Support Assistance [CSPM-71551]. ○ Conducted usability testing sessions for MFA case linking [CSPM-68189]. ○ Planned and prepped for ABAWD ACL [CSPM-73600]. ○ Designed CM Enhancement-YT video [CSPM-68266]. ○ Designed Language updates for SAR 7 due month [CSPM-72205]. ○ Started design on CF 685 updates [CSPM-71517]. ○ Finished design for Add FAQ to the Login Section of the help center [CSPM-73623]. ➤ Advocate Engagement <ul style="list-style-type: none"> ○ Planned and prepped for May UCDM Monthly comment log. |

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2 BenefitsCal Project Status Dashboard

| Topic | Status | Highlights |
|--------------|---|--|
| Availability |  | The BenefitsCal System did not experience any unplanned outages. |
| Defects |  | There are twenty (20) active Production defects. |
| Incidents |  | There are nine (9) open Tier 3 incidents. |

Status: **Green:** On schedule, performing as planned; **Yellow:** Potential delay/monitor with no material schedule impact; **Red:** Behind schedule and requires escalation.

Table 1.2-1 – Status Dashboard

1.3 Highlights from the Reporting Period

- **Priority Release** – None for the reporting period.
- **Emergency Release** – The BenefitsCal Team successfully deployed Emergency Release **24.05.21** to BenefitsCal Production.
- **Monthly Release** – The BenefitsCal Team successfully deployed Monthly Release **24.05.30** to BenefitsCal Production.

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Planned Outages


- Tuesday, 05/21/24 8:00 pm PST to 8:30 pm PST
 - Emergency Release 24.05.21
- Thursday, 05/30/24 8:00 pm PST to 9:30 pm PST
 - Monthly Release 24.05.30

2.0 Project Management

2.1 Deliverables

The following section gives details about the Deliverables and Work Products submitted within the reporting period and submission dates for upcoming Deliverables and Work Products.

2.1.1 Project Deliverables Summary

| Del # | Name | Team | Status ^[1] | Status |
|----------|---|------|--|---|
| WP 25.27 | BenefitsCal Monthly M&O Report – April 2024 | M&O |  | DWP submission 05/09/24 FWP submission 05/24/24 FWP approval 05/31/24 |

^[1] **Status:** **Green:** On schedule, performing as planned; **Yellow:** Potential delay/monitor with no material schedule impact; **Red:** Behind schedule and requires escalation.

Table 2.1-1 – Overall Summary of Deliverable Status for Current Reporting Period

2.1.2 Highlights for the Reporting Period

Deliverables and Work Products submitted:

- FWP 25.27: Monthly M&O Report – April 2024 on 05/24/24.

2.1.3 Activities for the Next Reporting Period

Deliverable and Work Product submissions for next reporting period:

- DWP 24.24: CX Bimonthly Report (Apr/May 2024) on 06/12/24.
- DWP 25.28: Monthly M&O Report – May 2024 on 06/11/24.
- FWP 28.26: BenefitsCal Work Plan Monthly Updates – May 2024 on 06/07/24.
- FWP 29.26: BenefitsCal Monthly Status Report – May 2024 06/07/24.

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2.2 CRFI/CIT Communications Status

The following table outlines the CalSAWS Information Transmittals (CITs) for the reporting period.

| CIT ID | To | Category | Subject | Distribution Date | Primary CalSAWS Contact | Backup CalSAWS Contact |
|---------|---|-------------|--|-------------------|-------------------------|------------------------|
| 0078-24 | PPOCs (All); Consortium Regional Managers (All); Self-Service Portal Committee (All); Training Committee (All) | CalSAWS M&E | CA-276107 Update JA – Self-Service Portal (SSP) – Case Link Requests | 05/20/24 | Dymas Pena | Laura Ould |
| 0080-24 | 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 | CalSAWS M&E | Scheduled Downtime Notification – 06/02/24 | 05/22/24 | Anand Kulkarni | Pete Quijada |
| 0081-24 | PPOCs (All); Consortium Regional Managers (All) | CalSAWS M&E | BenefitsCal Fact Sheet: Case Linking and Case Linking Verification | 05/23/24 | Marsale Eramya | Carrie White |
| 0085-24 | 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 | CalSAWS M&E | Scheduled Downtime Notification – 06/16/24 | 05/31/24 | Anand Kulkarni | Pete Quijada |

Table 2.2-1 – CITs

The following tables outline the CalSAWS Requests for Information (CRFIs) for the reporting period.

| CRFI ID | To | Subject | Distribution Date | Status | Response Due Date | Primary BenefitsCal Contact | Backup BenefitsCal Contact |
|-------------------------------|----|---------|-------------------|--------|-------------------|-----------------------------|----------------------------|
| None for the reporting period | | | | | | | |

Table 2.2-2 – CRFIs

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| CRFI ID | To | Subject | Distribution Date | Status | Response Due Date | Primary BenefitsCal Contact | Backup BenefitsCal Contact |
|-------------------------------|----|---------|-------------------|--------|-------------------|-----------------------------|----------------------------|
| None for the reporting period | | | | | | | |

Table 2.2-3 – Overdue CRFIs

2.3 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. | Open | Low | Medium | 05/10/21 |

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|----|-------|---|--------|------------|----------|-------------|
| | | <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 direction on the implementation schedule. <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 | | | | |

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| ID | Title | Details | Status | Risk Level | Severity | Date Logged |
|----|-------|--|--------|------------|----------|-------------|
| | | <p>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. 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> | | | | |

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|----|-------|--|--------|------------|----------|-------------|
| | | <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 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>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 10/4/23 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 | | | | |

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| | | <p>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> <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, 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>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. | | | | |

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|----|-------|---|--------|------------|----------|-------------|
| | | <ul style="list-style-type: none"> 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 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. <p>December 29, 2023:</p> <ul style="list-style-type: none"> Next working session is scheduled for 01/03/24. 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 01/10/23. 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 02/07/23. 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 | | | | |

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| | | <p>items pending CFA to confirm final disposition and next steps.</p> <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) 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. <p>April 5, 2024:</p> <ul style="list-style-type: none"> Item #31 deployed to production with the March 24.03 release. Item #20 is on schedule for the May 24.05 release. 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. Premise planning discussions will continue 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). <p>April 17, 2024:</p> <ul style="list-style-type: none"> The most recent working session was conducted on 03/06/24 with the CDSS, Consortium, and CWDA on Premise funding and open items Parity items #9, #19, | | | | |

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| | | <p>and #63 implemented and deployed to production with the 24.01 release in January 2024.</p> <ul style="list-style-type: none"> Item #31 (CF-303) was delivered with the March 24.03 release. Item #20 (SSA Assisted Apps) is on schedule to be delivered with the May 24.05 baseline release. Premise planning discussions continued with the CDSS, Consortium, and CWDA for the five (5) parity items #22, #34, #44, #52, and #55. CDSS suggested closure on three (3) parity items #24, #46, and #51 and BenefitsCal recommendations are shared with CDSS. CDSS is working on the final decision on these. <p>May 3, 2024:</p> <ul style="list-style-type: none"> A working session was conducted on 5/1/24 with CDSS, Consortium on open items Item #20 (SSA Assisted Apps) is on schedule to be delivered with the May 24.05 baseline release. CDSS confirmed funding will be provided for items #22, #34, #44, #52. For #55, CDSS will confirm whether the Pre-populated SAR 7 funds can be utilized or not. Discussions will continue for the closure of remaining (3) parity items #24, #46, and #51. | | | | |

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| ID | Title | Details | Status | Risk Level | Severity | Date Logged |
|-----|---|---|--------|------------|----------|-------------|
| 290 | Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers | <p>Recently issued Release of Information (ROI) policy is not detailed enough, nor is it consistent between the two state Departments (CDSS and DHCS). The policy as written may create customer information privacy/security, safeguard and county operations concerns, and liabilities. As the policy was released after the completion of ROI design, development, and testing of the functionality in BenefitsCal and CalSAWS, counties have not had sufficient time to assess the ROI functionality with the high-level policy and to be able to determine impacts to their county operations and the associated alignment with the existing BenefitsCal/CalSAWS design. The policy as written does not give clear direction on County responsibilities associated with the establishment of CBO agreements, provisions of those agreements and monitoring of CBO compliance with the agreements. Counties also have not had sufficient time to be able to determine if their current CBO agreement language is adequate and includes provisions and protections to further protect customer information when being accessed by CBOs via BenefitsCal. BenefitsCal/CalSAWS initial design and implementation has been postponed until final/revised policy is issued by both CDSS and DHCS and there is operational clarity agreed to by all parties.</p> <p>June 16, 2023:</p> <ul style="list-style-type: none"> Responded to SIRFRA 1270/1271 regarding Expanding the Release of Information Feature with set of questions to DHCS from BenefitsCal, CalSAWS, and CWDA on 06/12/23. <p>June 30, 2023:</p> <ul style="list-style-type: none"> Risk was reduced to probability of 30% which brings it to an overall medium level. State partners to confirm the topics and agenda items for the workgroup discussions. Topic was also covered during the June JPA Board meeting on 06/29/23. <p>July 28, 2023:</p> | Open | Medium | High | 05/19/23 |

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024

| ID | Title | Details | Status | Risk Level | Severity | Date Logged |
|----|-------|--|--------|------------|----------|-------------|
| | | <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 responsibilities matrix as well as the liability and contract spectrum of the Next workgroup meeting is scheduled on 12/04/23. <p>December 15, 2023:</p> | | | | |

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024

| ID | Title | Details | Status | Risk Level | Severity | Date Logged |
|----|-------|---|--------|------------|----------|-------------|
| | | <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 Responsibilities – in the event a breach or security incident. Additionally, during the last workgroup meeting, milestones | | | | |

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024

| ID | Title | Details | Status | Risk Level | Severity | Date Logged |
|----|-------|---|--------|------------|----------|-------------|
| | | <p>needed to determine the implementation timeline has been discussed.</p> <ul style="list-style-type: none"> Next work group meetings are planned for 03/18/24, and 04/08/24. <p>April 5, 2024:</p> <ul style="list-style-type: none"> Workgroup session conducted on 03/18/24. DHCS and CDSS provided updates for progress of letters. Initiated discussion to capture high-level milestones including Policy, Change Management, Automation, Funding and Timing. Next meeting is scheduled for 04/08/24. <p>April 17, 2024:</p> <ul style="list-style-type: none"> Workgroup session conducted on 04/08/24. Focus of the meeting was to begin reviewing the use cases and the data points to identify any other policy clarifications or guidance that may be needed to help support counties and public. Counties worked with CWDA to capture outstanding concerns, and these have been shared with DHCS and CDSS. Next meeting is scheduled for 04/29/24. <p>May 3, 2024:</p> <ul style="list-style-type: none"> Workgroup session conducted on 04/29/24. Group continued reviewing the use cases and the data points requiring policy guidance and clarifications. Also, group began discussions about situations may occur in preparation for updating/changing business processes (for Counties and CBO/Assistors). Next meeting is scheduled for 05/13/24. | | | | |

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

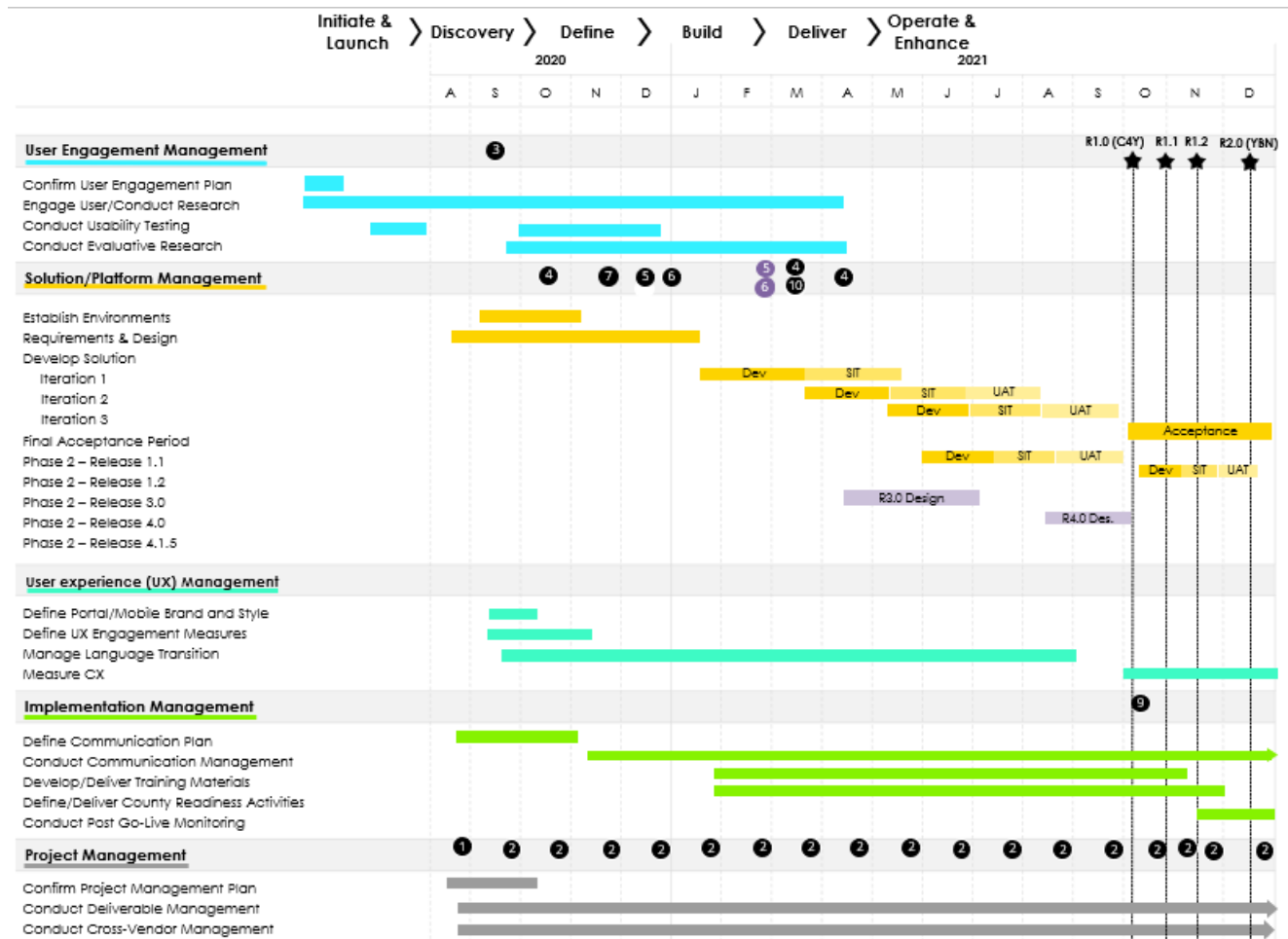
Period: May 20, 2024 to June 2, 2024

| ID | Title | Details | Status | Risk Level | Severity | Date Logged |
|-----|---|--|--------|------------|----------|-------------|
| 303 | Unauthorized BenefitsCal Users could access CalSAWS data without Digital Identity Verification when case linking functionality is enabled | <p>The existing implementation of the CalSAWS Interactive Voice Response (IVR) and BenefitsCal Case Linking function used to link a BenefitsCal Customer Account to CalSAWS Case and Person information does not fully meet current federal standards for digital identity verification (NIST SP 800-63A: Digital Identity Guidelines), which increases the risk of unauthorized access, potentially resulting in a data breach. CalSAWS IVR enables users to self-represent using their voice but without identity verification. BenefitsCal Case Linking functionality, supported by a CalSAWS service, allows a BenefitsCal user to claim ownership of existing Personally Identifiable Information (PII) in the CalSAWS system by linking their anonymously created BenefitsCal account to existing information within CalSAWS. This functionality requires confirmation of the claimed BenefitsCal account user's identity before they are allowed to access the CalSAWS Case and Person information.</p> <p>April 5, 2024:</p> <ul style="list-style-type: none"> New risk introduced. <p>April 18, 2024:</p> <ul style="list-style-type: none"> Contact Center Team is actively working on the assessment of the system compliance with NIST 800-53 Rev 5 with the Security, Consortium and QA teams. <p>May 3, 2024:</p> <ul style="list-style-type: none"> Discussion between Accenture Security and IVR teams held to review the components and flow of the IVR user verification process. Analysis of how IVR meets or does not meet the guidelines from NIST 800-63. Identity Verification guidelines pending additional analysis, etc. 05/17/24. | Open | Low | Low | 03/18/24 |

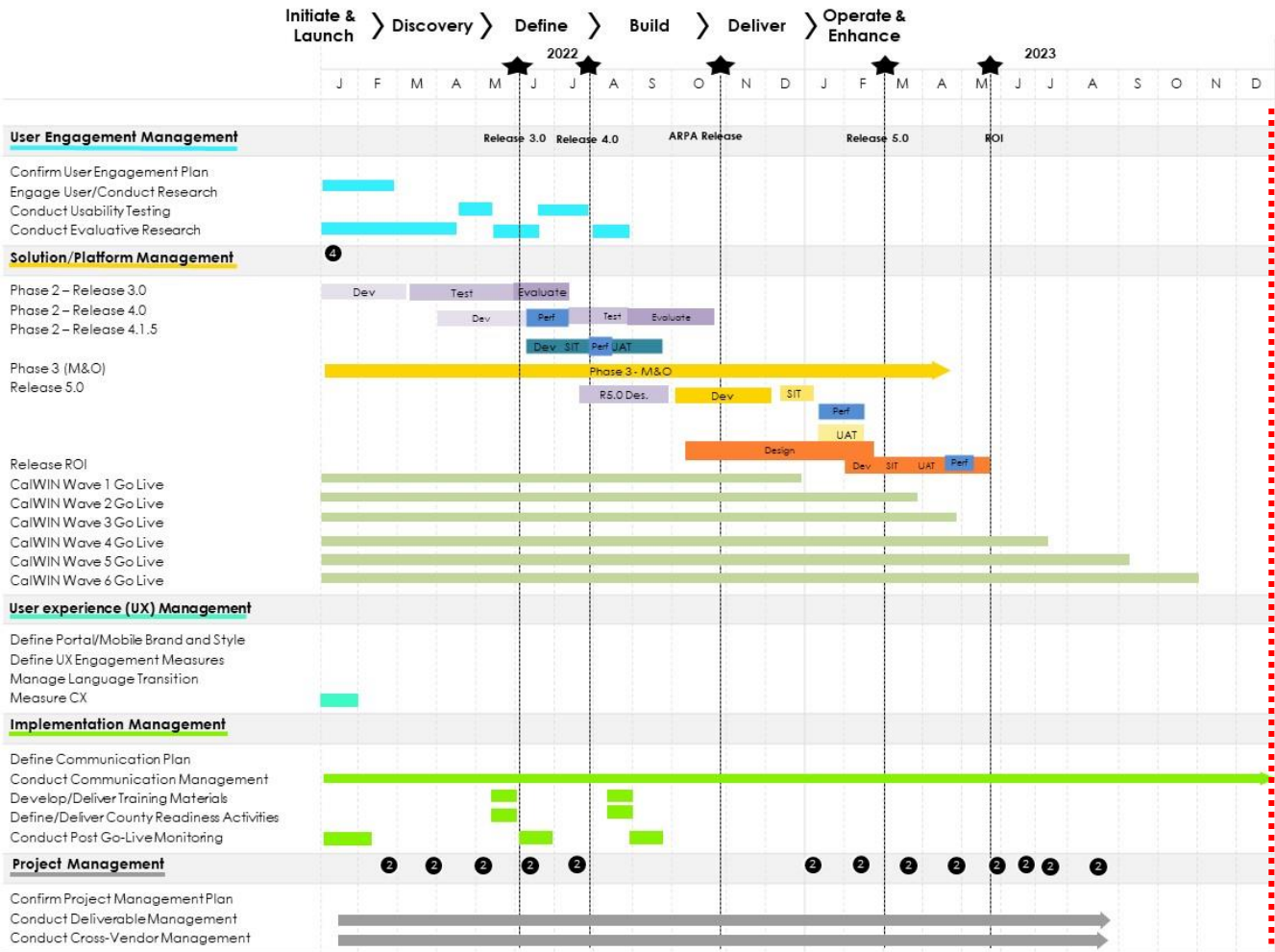
Table 2.3-1 – Project Risks and Issues

2.4 Project Work Plan Reports

Project Timeline



CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report
 Period: May 20, 2024 to June 2, 2024



Project Action Items – Overdue

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

| ID | Description | Owner | Due Date |
|-------|-------------|-------|----------|
| None. | | | |

Table 2.4-1 – Overdue Action Items

2.5 SCIRFRA/SCERFRA/SIRFRA/SARRA Information

The table below outlines the summary of SAWS Communication Information Requests for Research and Analysis (SCIRFRA), SAWS Cost Estimation Requests for Research and Analysis (SCERFRA), SAWS Information Request for Research and Analysis (SIRFRA), SAWS Advocates Request for Research and Analysis (SARRA), and Consortium Request for Policy (CRPC) activities for the reporting period.

| Status | Total |
|--------------|----------|
| Rejected | 0 |
| New/Assigned | 3 |
| Completed | 2 |
| Reopened | 1 |
| In Review | 0 |
| Withdrawn | 0 |
| Total | 7 |

Table 2.5-1 – Summary of SCIRFRA/SCERFRA/SIRFRA/SARRA Requests

Completed:

- CSPM-73841: SCERFRA 24-513 – PVS Contact Letter
- CSPM-73866: SIRFRA 1379 – CHDP Program

Re-opened:

- CSPM-73548: SCERFRA 24-913 – SB 1254 – CalFresh: Enrollment of Incarcerated Individuals

New / Assigned:

- CSPM-73974: SCERFRA 24-515 – AB 305 – Veteran Services Notice
- CSPM-74021: SCERFRA 24-516 – California Food Assistance Program Expansion – May Revise
- CSPM-74038: SCERFRA 24-517 – FRA Pilot Proposal

2.6 Deviation from Plan/Adjustments

None for the reporting period.

3.0 BenefitsCal Collaboration Model (CM)

3.1 Highlights of the Reporting Period

- Analysis in progress for seventeen (17) items prioritized from Quarter 1 of 2024.
- Prioritization In Progress for items prioritized in Quarter 3 and Quarter 4 of 2023. (These 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; Awaiting the list of Email Notifications from Consortium/CalSAWS. |
| Research Item | CSPM-71551 | CBO (Community Based Organization) Support Assistance | In Progress | Research In Progress; Prioritized for April-May 2024. |
| Research Item | CSPM-71962 | Duplicate applications | In Progress | Research In Progress; Prioritized for April-May 2024. |
| Research Item | CSPM-71544 | Document Upload – List of Options | Not Started | Prioritized for July 2024. |
| Research Item | CSPM-71543 | Document Upload – Multiple Docs | Not Started | Prioritized for July 2024. |
| Enhancement | CSPM-68111 | Display Help Text for Customers when Case does NOT link automatically | Closed | Development, SIT, and UAT Completed; Deployed to Production. |
| Research Item | CSPM-71552 | Orange Banner | Not Started | Prioritized for August 2024 |
| Research Item | CSPM-68269 | Display Race Options in Alphabetical Order | Analysis In Progress | Design Completed; Moved to Analysis in Progress; Planned for delivery in June 2024. |
| Enhancement | CSPM-67761 | Update Application and RE/SAR 7 Status Tracker | Prioritization Needed | Tentatively prioritized for August 2024. |

Table 3.1-1 – Enhancements Updates, Prioritized by CM

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024

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 | Finish Research with Policy | 06/30/24 |
| Research Item | CSPM-71551 | CBO Support Assistance | Finish Research with CBOs | 06/30/24 |
| Research Item | CSPM-71962 | Duplicate applications | Finish Research with Caseworkers | 06/30/24 |
| Research Item | CSPM-71544 | Document Upload – List of Options | N/A | 07/31/24 |
| Research Item | CSPM-71543 | Document Upload – Multiple Docs | N/A | 07/31/24 |
| Research Item | CSPM-71552 | Orange Banner | N/A | 08/31/24 |
| Research Item | CSPM-68269 | Display Race Options in Alphabetical Order | Begin Development | 06/27/24 |
| Enhancement | CSPM-67761 | Update Application and RE/SAR 7 Status Tracker | N/A | 06/27/24 |

Table 3.2-1 – Planned Activities for Next Reporting Period for Enhancements, Prioritized by CM

4.0 Maintenance and Operations

Operational Support

- Provided operational support for manual reprocessing of a transaction between CalSAWS **and** BenefitsCal.

CFA Meeting

- Participated in a weekly meeting with Code for America (CFA) to support their ongoing operational questions for BenefitsCal and to discuss future enhancements.

Daily Partner Coordination Meetings

- Conducted daily partner coordination meetings with CalSAWS covering design, development, testing, and release management for defects and enhancements impacting both systems along with production observations.

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024

M&O Phases

- Completed the initial **acceptance** period and moved into Maintenance and Operations.

4.1 Service Management

4.1.1 Overview

Incidents Created

- Seven (7) incidents were created in the biweekly reporting period for the BenefitsCal Tier 3 Team.

Incidents Resolved

- The BenefitsCal Tier 3 Team resolved eight (8) incidents in the biweekly reporting period.

Incidents Closed

- The BenefitsCal Tier 3 Team closed zero (0) incidents in the biweekly reporting period.

Incidents Triaged

- The BenefitsCal Tier 3 Team has triaged sixty-nine (69) incidents in the biweekly reporting period.

Problems Created

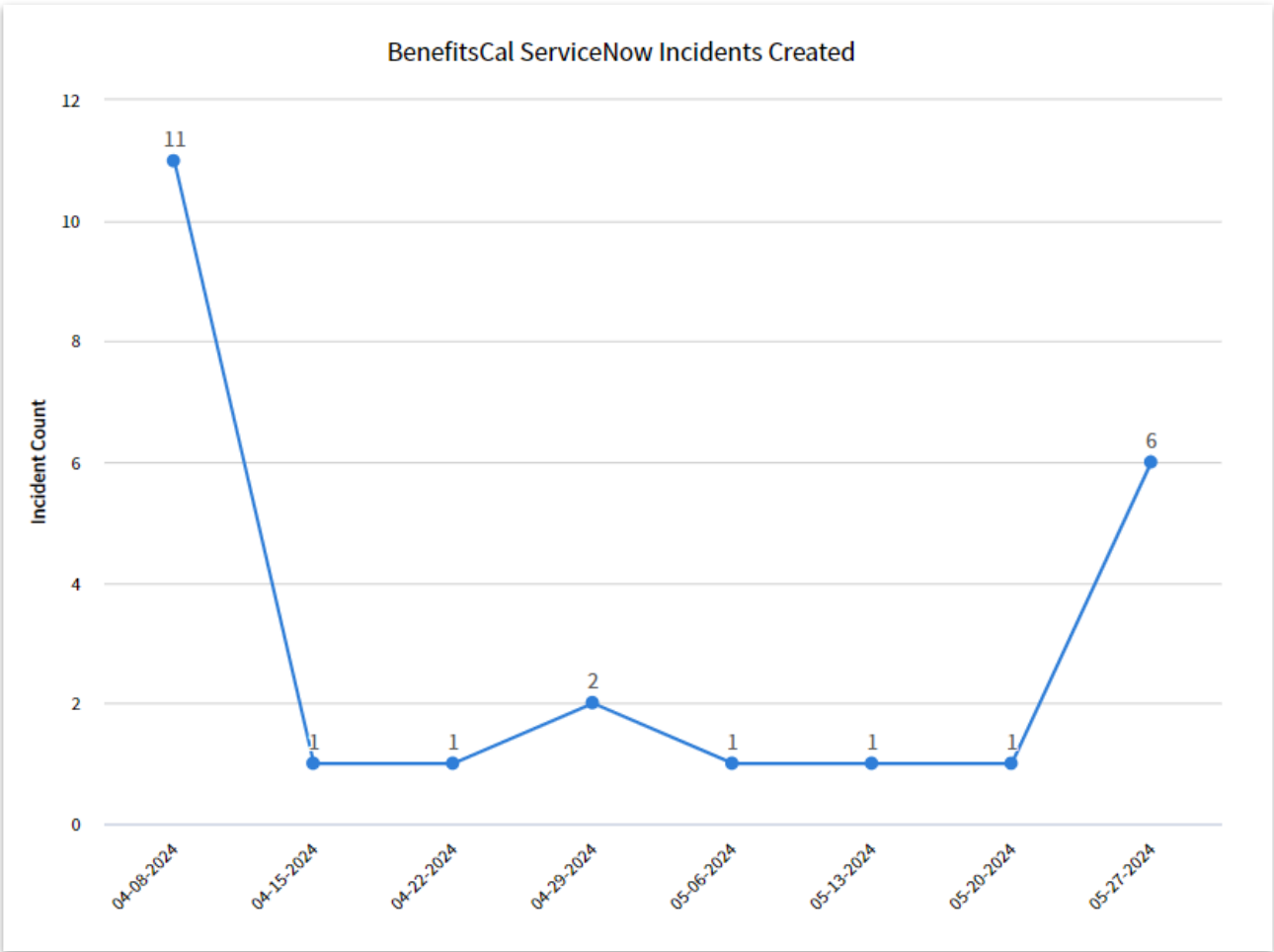
- The BenefitsCal Tier 3 Team created zero (0) problem tickets in the biweekly reporting period.

Problems Resolved

- The BenefitsCal Tier 3 **Team** resolved five (5) problem tickets in the biweekly reporting period.

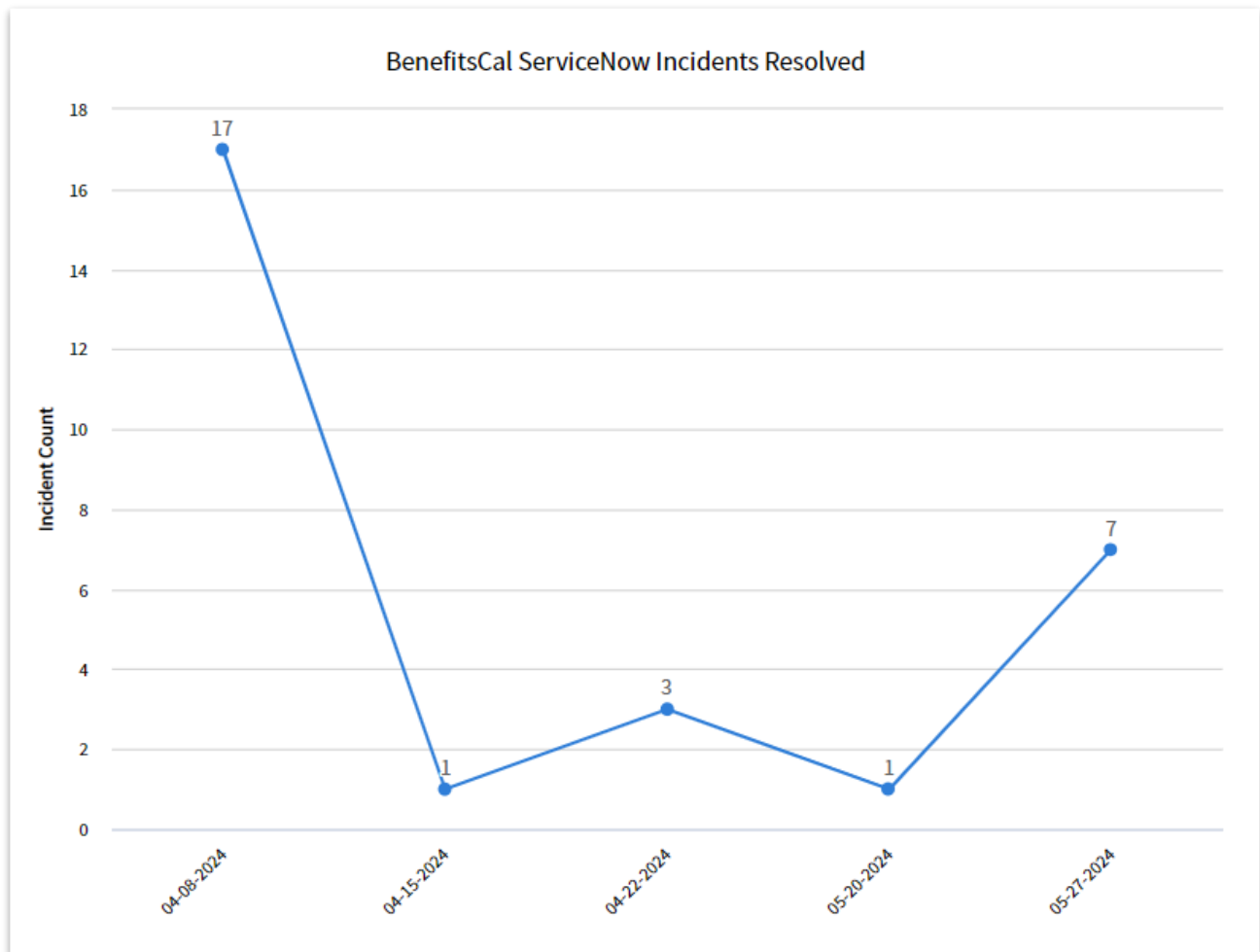
4.1.2 BenefitsCal Help Desk Metrics

The charts below represent incidents created, resolved, and triaged within the reporting period. If a week is not showing within a particular chart, it is because there were no incidents to report for that week.



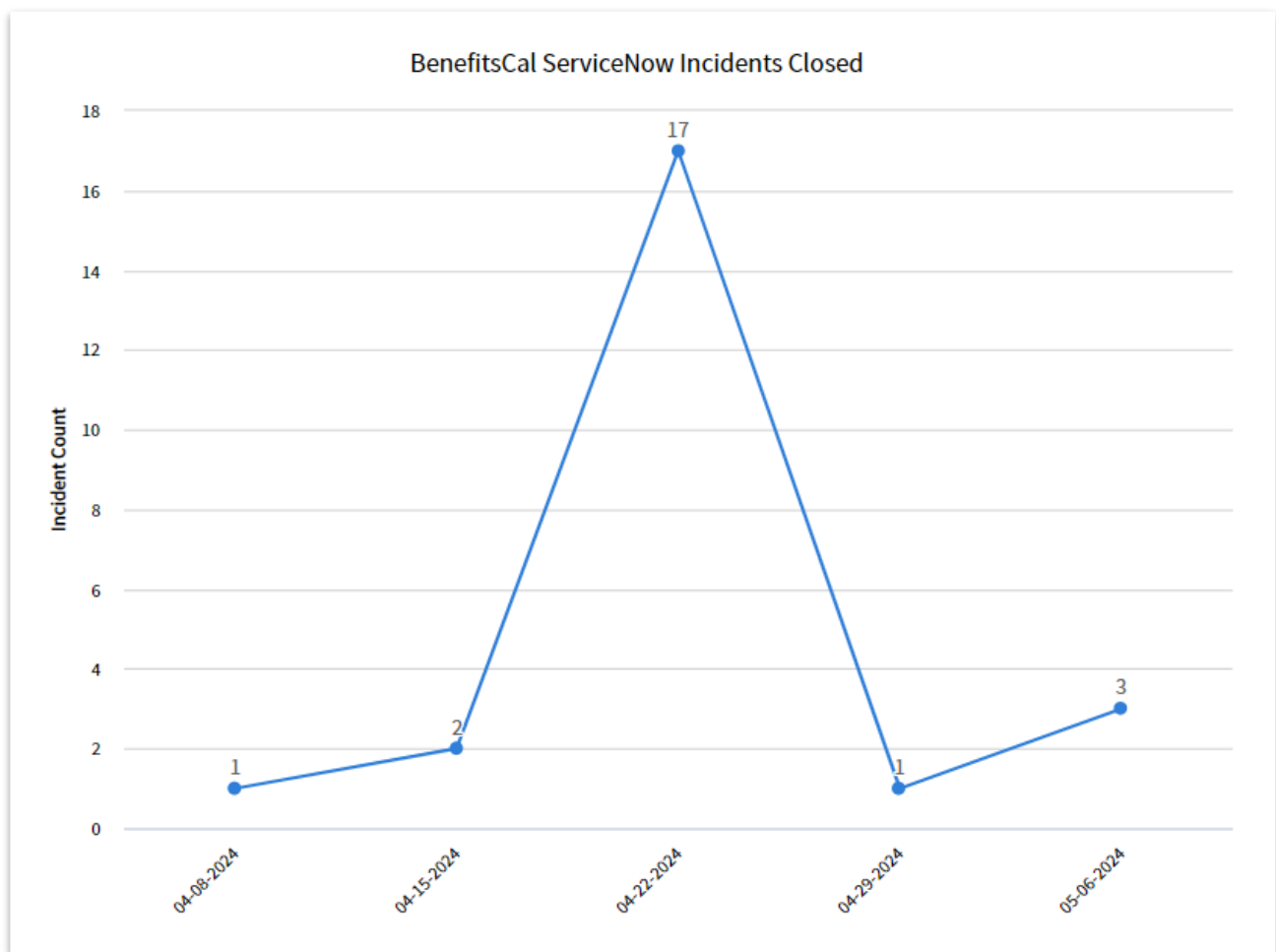
CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024



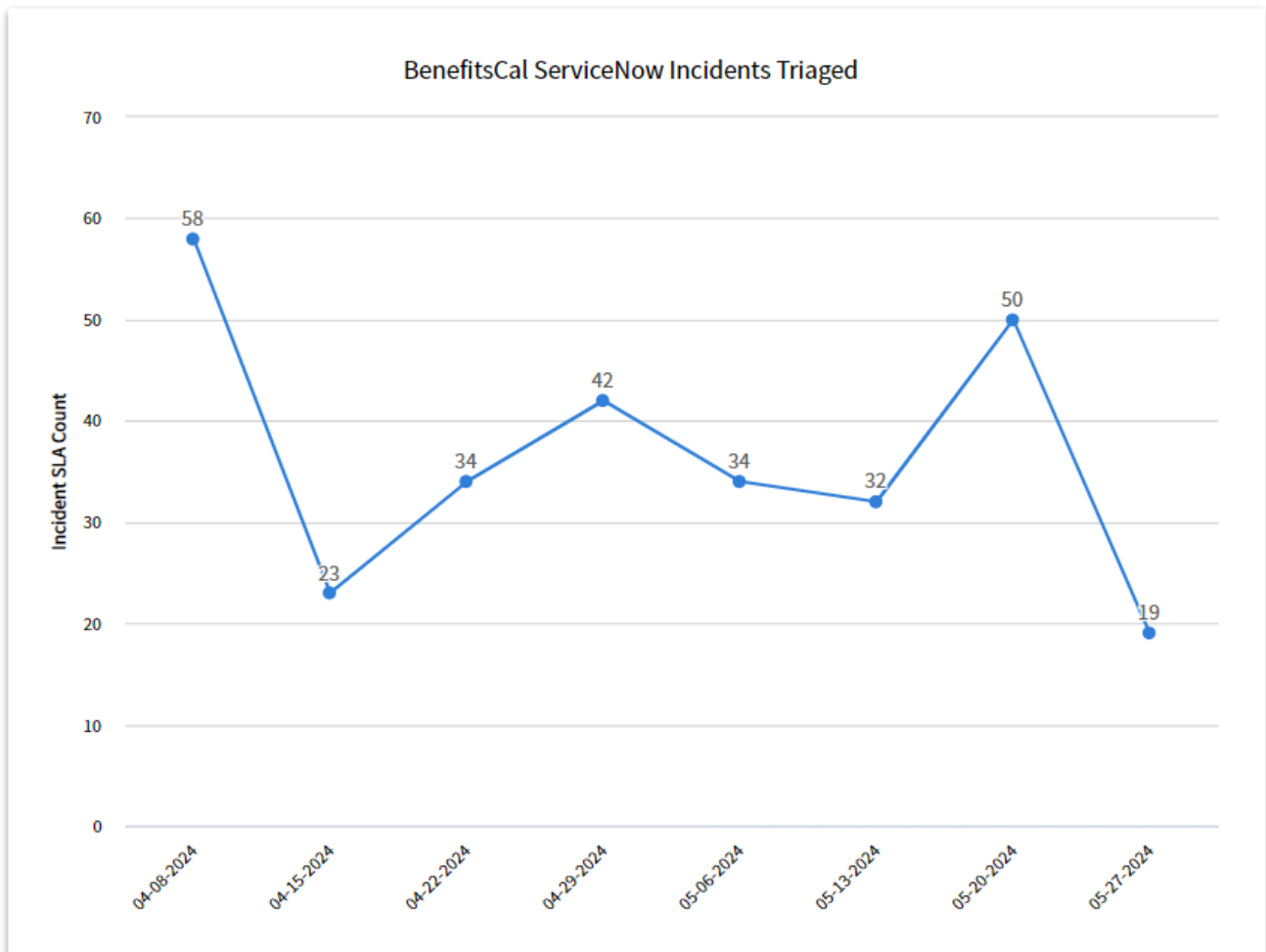
CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024



CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024



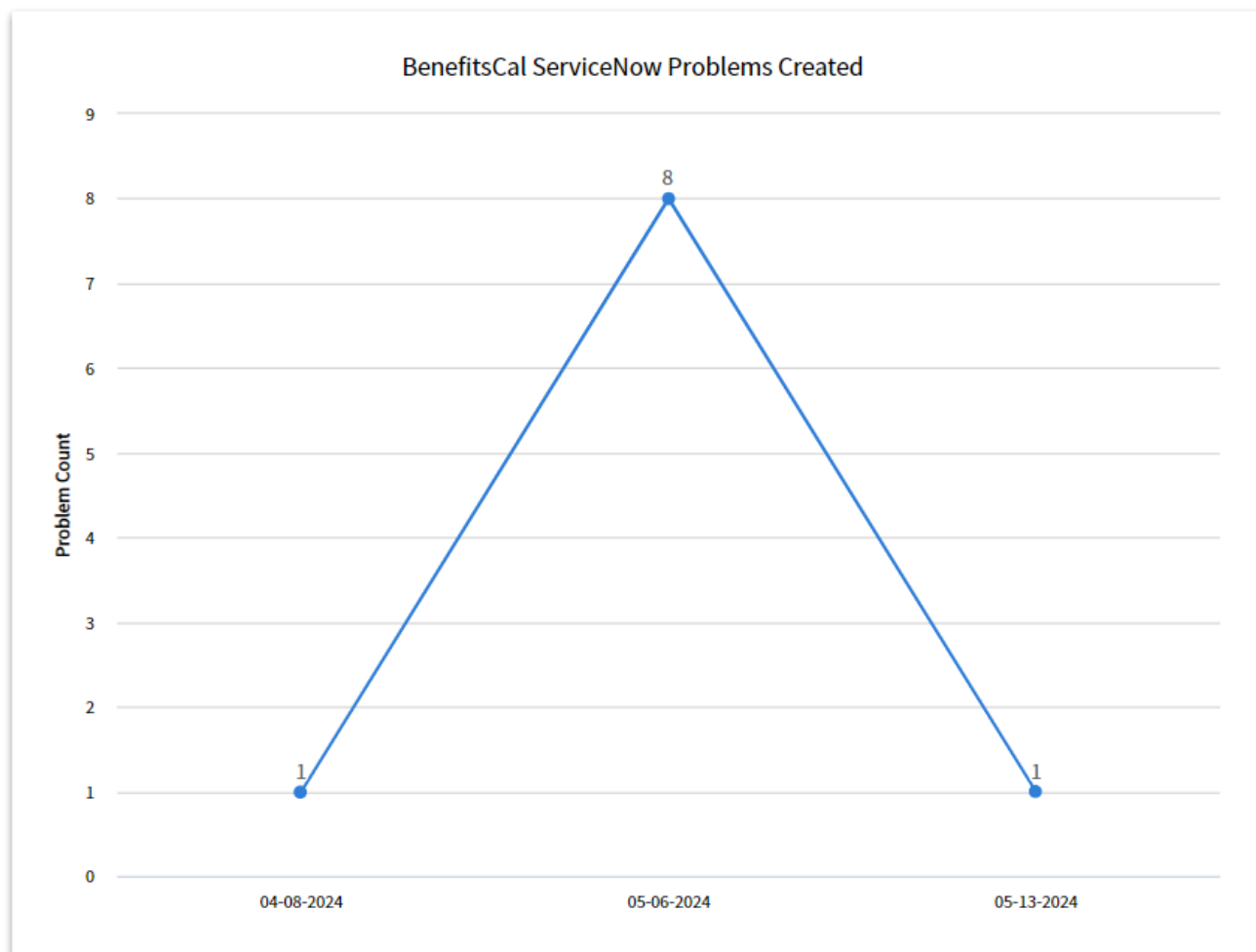
Note: The graphs represent the ServiceNow incidents associated to all 58 Counties. Incidents represent the first level of ticketing that enters the ServiceNow system. The dates on the x-axis represent the start of week. The metrics does not include "Tier 3 App Support – BenefitsCal Questions (DLT)."

Figures 4.1-1, 4.1-2, and 4.1-3 – BenefitsCal ServiceNow Incidents

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

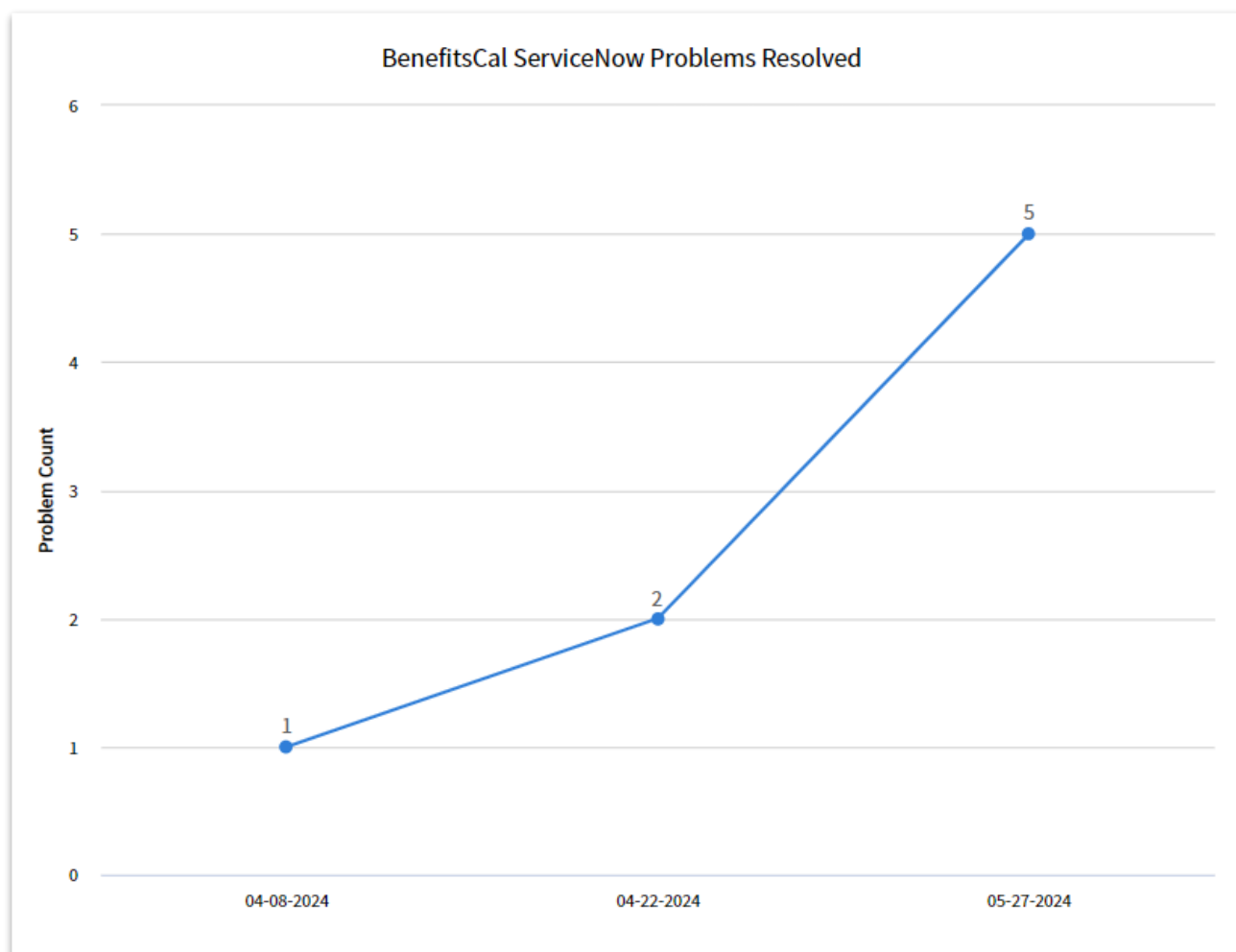
Period: May 20, 2024 to June 2, 2024

The charts below represent problems created, resolved, and triaged within the reporting period. If a week is not showing within a particular chart, it is because there were no problems to report for that week.



CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024



Note: The graphs represent the ServiceNow problems associated to 58 Counties. Problems represent issues that can have a many to one relationship with incidents and the final step in escalation. The dates on the x-axis represent the start of a week.

Figures 4.1-4 and 4.1-5 – BenefitsCal ServiceNow Problems

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024

BenefitsCal ServiceNow Incidents by State and Age

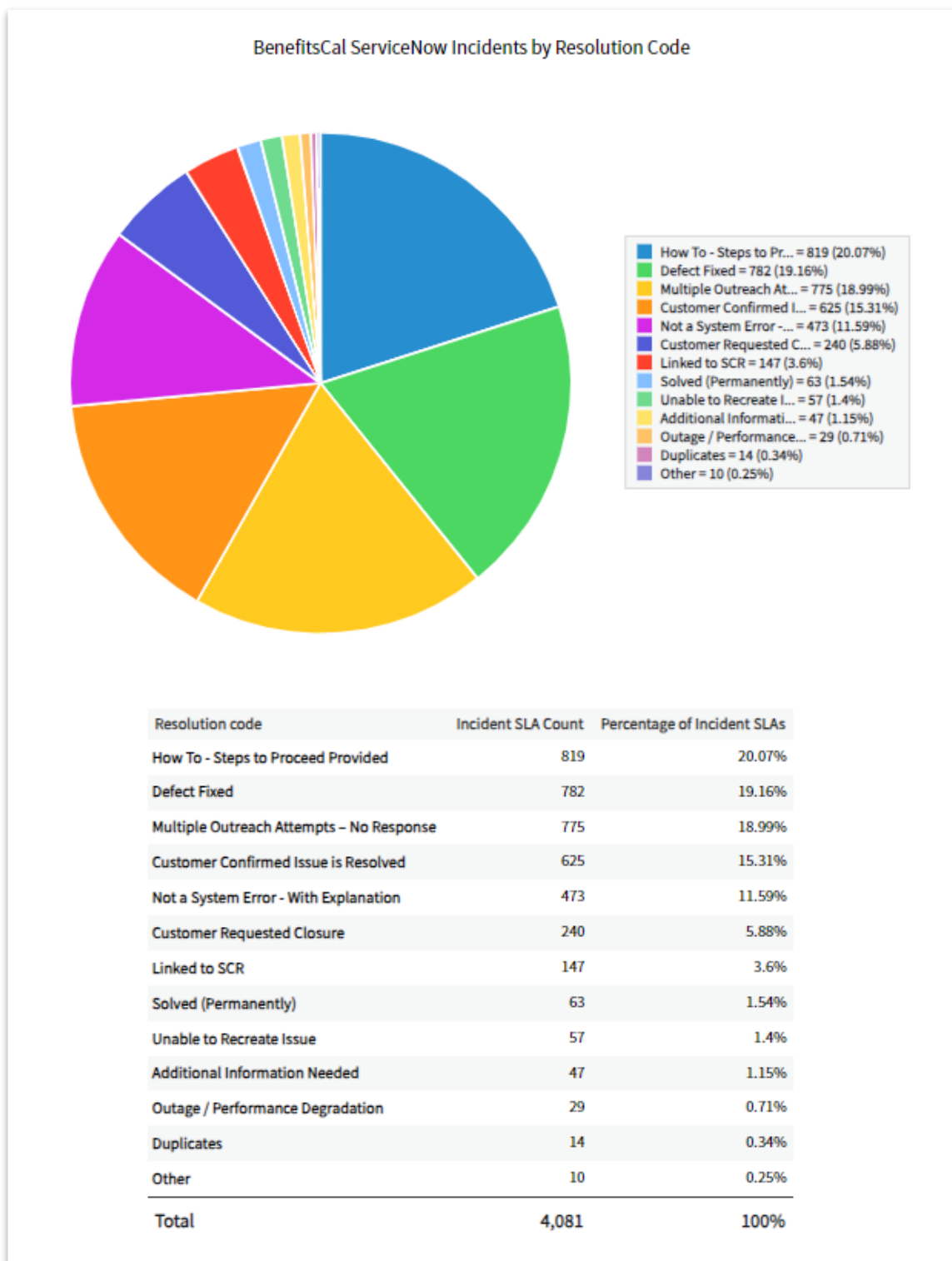
| State | Aging Category | 1-5 Days | 6-10 Days | 11-15 Days | 16-30 Days | 30-60 Days | 60-180 Days | >180 Days | Count |
|-------------|----------------|----------|-----------|------------|------------|------------|-------------|-----------|-------|
| | | | | | | | | | |
| New | | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| In Progress | | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| On Hold | | 1 | 1 | 2 | 0 | 10 | 5 | 1 | 20 |
| Resolved | | 0 | 0 | 0 | 2 | 0 | 1 | 0 | 3 |
| Closed | | 0 | 0 | 51 | 337 | 157 | 113 | 2 | 660 |
| Count | | 4 | 1 | 53 | 339 | 167 | 119 | 3 | 686 |

| | |
|--------------------|--|
| New | Incident triage not started. |
| In Progress | Incident triage in progress. |
| On Hold | Incident triage paused – awaiting information/problem. |
| Resolved | Incident triage completed providing steps for resolution. |
| Closed | Incident triage completed after a defect fix or change request implementation. |

Figure 4.1-6 – BenefitsCal ServiceNow Incidents by State and Age

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024

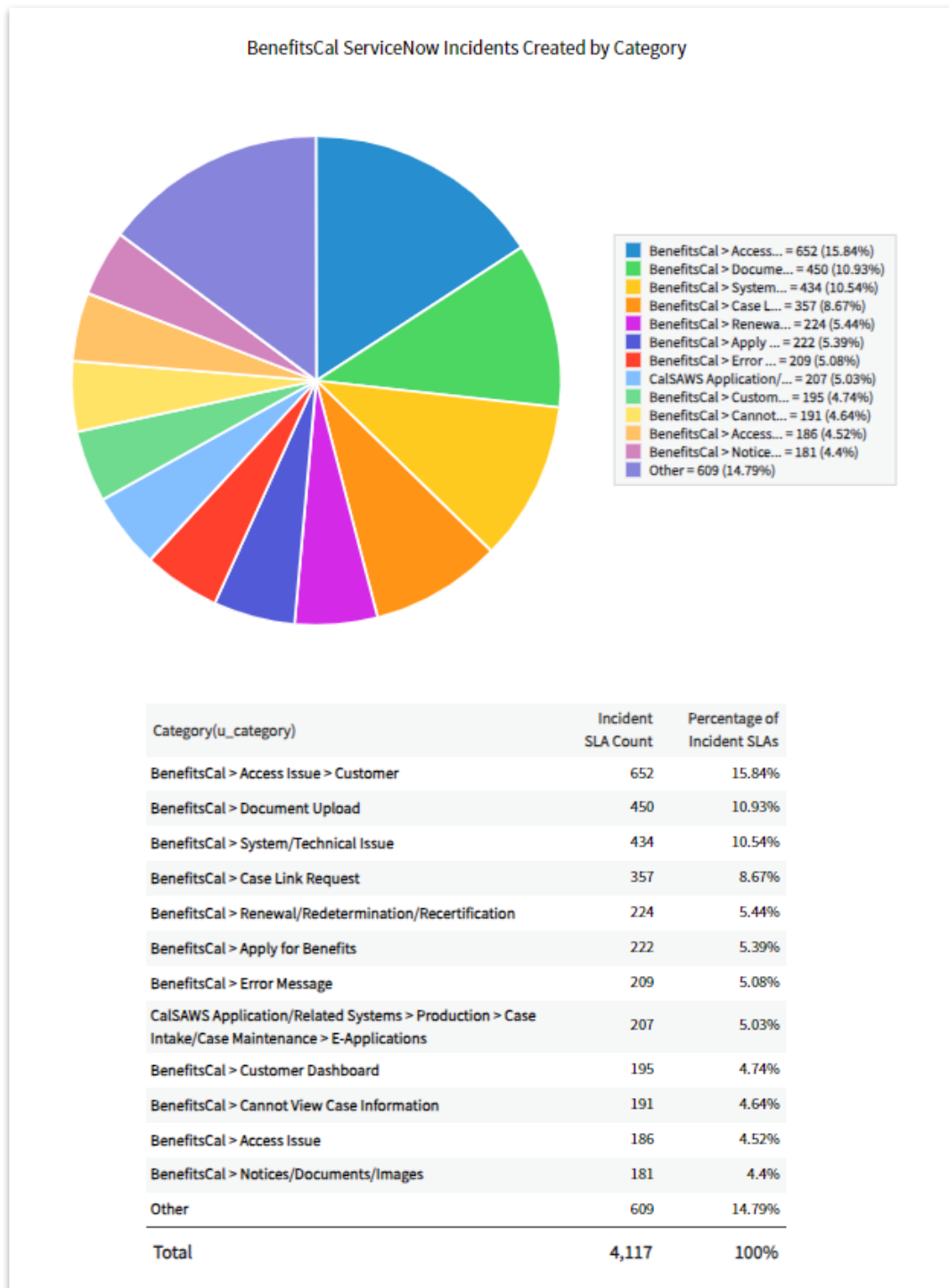


Note: The pie chart above represents Incidents resolved since BenefitsCal Go-Live on 09/27/21.

Figure 4.1-7 – BenefitsCal ServiceNow Incidents by Resolution Code

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024



Note: The pie chart above represents Incidents by category created since BenefitsCal Go-Live on 09/27/21. The “Other” category will cover incidents related to BenefitsCal module such as Dashboard, Help Center, Homepage, Report a Change, Application Summary.

Figure 4.1-8 – BenefitsCal ServiceNow Incidents Created by Category

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024

4.2 Technology Operations

The BenefitsCal technology operations team provides Amazon Web Services (AWS) serverless infrastructure and BenefitsCal application support. All upgrades and changes to the infrastructure and application are performed in accordance with the Consortium change control process. AWS serverless infrastructure support activities include upgrades to AWS components such as the Web Application Firewall (WAF), CloudFront, Application Programming Interface (API) Gateway, Lambdas, Simple Queue Service (SQS), CloudWatch, X-Ray and Aurora Postgres, Postgres Relational Database Service (RDS), and RDS Proxy. Application maintenance and support includes release and configuration management across the non-production and production environments. The Redis Cluster mem cache is upgraded to 6.2.6.H.

4.3 BenefitsCal Maintenance and Operations

| Scheduled Date | Outage Timeframe | Activity Description |
|---------------------|--|---|
| 05/21/24 | 8:00 pm – 9:00 pm PST | BenefitsCal Production Deployment – 24.05.21 |
| 05/26/24 – 05/27/24 | 05/26/24 10:00 pm – 05/27/24 2:00 am PST | CalSAWS Application maintenance (Hold on Documents Queue) |
| 05/29/24 | 2:00 am – 5:00 am PST | CalSAWS Application maintenance (Maintenance Mode) |
| 05/30/24 | 8:00 pm – 9:30 pm PST | BenefitsCal Production Deployment – 24.05.30 |
| 06/02/24 | 8:00 am – 1:00 pm PST | CalSAWS Application maintenance (Offline Mode) |
| 06/02/24 | 1:45 pm – 2:45 pm PST | Emergency CalSAWS Application maintenance (Offline Mode) |

Table 4.3-1 – BenefitsCal Outages

| Scheduled Date | Outage Timeframe | Application Mode |
|----------------|-----------------------|--|
| 06/27/24 | 8:00 pm – 9:30 pm PST | BenefitsCal Production Deployment – 24.06.27 |

Table 4.3-2 – BenefitsCal Upcoming Maintenance

| Ticket ID | Description | Impact Date/Time | Impact | Status | Owner |
|------------|--|--|---|----------|---------|
| PRB0049218 | San Bernardino County users at the 1175 W Foothill Blvd, Rialto site is unable to access CalSAWS and associated systems due to a power outage. | 05/24/24 9:16 am – 05/24/24 10:00 am PST | San Bernardino County users at the Rialto site will not be able to access CalSAWS and associated systems until the issue is resolved. | Resolved | CalSAWS |
| PRB0049240 | Modoc County users at the 120 North Main Street, Alturas site is unable to access CalSAWS and associated systems. | 05/29/24 7:00 am – 05/29/24 4:00 pm PST | Modoc County users at the Alturas site will not be able to access CalSAWS and associated systems until the issue is resolved. | Resolved | CalSAWS |

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report
 Period: May 20, 2024 to June 2, 2024

| Ticket ID | Description | Impact Date/Time | Impact | Status | Owner |
|------------|---|--|--|----------|---------|
| PRB0049250 | Mono County users at the 107384 Highway 395, Coleville site is unable to access CalSAWS and associated systems due to a scheduled utility outage. | 05/30/24 9:27 am – 05/30/24 10:11 am | Mono County users at the Coleville site will not be able to access CalSAWS and associated systems until the scheduled utility outage is completed. | Resolved | CalSAWS |
| PRB0049259 | Users are unable to access CalSAWS and associated systems. | 05/30/24 1:30 pm – 05/30/24 2:10 pm | Users will not be able to access CalSAWS and associated systems until the issue is resolved. | Resolved | CalSAWS |

Table 4.3-3 – BenefitsCal Incident Follow-Up Summary

4.4 Production Defect Backlog

The Production defect backlog bar chart depicts the balance of open (unresolved Production defects – Red) and closed defects (Green), month-over-month. Defects are closed upon system test validation and release deployment to Production.



Figure 4.4-1 – Production Defects Backlog Monthly Trend

4.4.1 Release Schedule Production Defect Fix

| Severity | Release 24.06.27 | TBD | Total |
|------------------------|---------------------|-----------|-----------|
| 1-High | 0 | 0 | 0 |
| New | 0 | 0 | 0 |
| In Progress | 0 | 0 | 0 |
| Closed | 0 | 0 | 0 |
| 2-Normal/Medium | 0 | 0 | 0 |
| New | 0 | 0 | 0 |
| In Progress | 0 | 0 | 0 |
| Closed | 0 | 0 | 0 |
| 3-Normal/Low | 10 | 10 | 20 |
| New | 0 | 0 | 0 |
| In Progress | 10 | 10 | 20 |
| Closed | 0 | 0 | 0 |
| 4-Cosmetic | 0 | 0 | 0 |
| New | 0 | 0 | 0 |
| In Progress | 0 | 0 | 0 |
| Closed | 0 | 0 | 0 |
| Total | 10 | 10 | 20 |

Table 4.4-2 – Production Defect Fix – Release Schedule

4.5 Production Operations

4.5.1 Root Cause Analysis (RCA)

None for the reporting period.

4.6 Deviation from Plan/Adjustments

None for the reporting period.

5.0 Application Development and Test

5.1 Priority Release Summary

This section outlines the scope of defect fixes included in each ad-hoc priority release deployed in this reporting period.

BenefitsCal Priority Release

- None for the reporting period.

BenefitsCal Emergency

- BenefitsCal Emergency Release 24.05.21 was successfully deployed on 05/21/24 to BenefitsCal Production.
- One (1) defect was planned for User Error Handling, Exception Handling, and Application Summary.

BenefitsCal Monthly Release

- BenefitsCal Monthly Release 24.05.30 was successfully deployed on 05/30/24 to BenefitsCal Production.
- Fourteen (14) defects and four (4) enhancements were planned for User Error Handling, Exception Handling, and Application Summary.

| Release | Release Date | Summary |
|--------------------|--------------|---|
| 24.06.27 – Monthly | 06/27/24 | Ten (10) production defects and five (5) enhancements are planned for User Error Handling, Exception Handling, and Application Summary. |

Table 5.1-1 – BenefitsCal Upcoming Releases

5.2 Requirements and Design

5.2.1 Highlights of the Reporting Period – Requirements and Design

Designs and Design Meetings

- Finalized design work for May 2024 enhancements.
- Began design work for June 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-In on 05/20/24.
- Attended ROI Workgroup Call on 05/20/24.
- Hosted County Webinar – BenefitsCal Case-Link MFA Orientation (Phone Verification) on 05/20/24.

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- Hosted the DDI and M&O Biweekly calls on 05/21/24, 05/23/24, 05/28/24, and 05/30/24.
- Hosted CBO Webinar – BenefitsCal Case-Link MFA Orientation (Phone Verification) on 05/21/24.
- Attended App Dev Meeting on 05/21/24.
- Hosted SCERFRA Touchpoint on 05/21/24.
- Attended CAPI Automation Workgroup on 05/21/24.
- Hosted the BenefitsCal PM Stand-Up Meetings with the Consortium on 05/22/24 and 05/29/24.
- Attended Student Info/Attendance Status Discussion on 05/22/24.
- Hosted Case Link Functionality Walkthrough to CISO on 05/22/24.
- Hosted Info for Application/SAR 7 Tracker Discussion on 05/23/24.
- Attended 24.05 Reflect & Evolve (County Validation) Meeting on 05/23/24.
- Attended County Release Readiness Discovery Session on 05/28/24.
- Attended App Dev Call on 05/28/24.
- Attended CFAP Expansion on 05/28/24.
- Attended Region-4 Management Site Visit Meeting on 05/29/24.
- Attended BC Freeze Date (County Validation) Meeting on 05/30/24.
- Hosted Follow-Up Discussion on App/RE/SAR 7 Tracker on 05/30/24.

5.2.2 Activities for the Next Reporting Period – Requirements and Design

Designs and Design Meetings

- Continue design work for June 2024 enhancements.
- Begin design work for July 2024 enhancements.
- Continue working with the development and testing teams on the SSA (Social Security Administration) Application on BenefitsCal enhancement CSPM-65292.
- Host the BenefitsCal CWDA Check-In on 06/03/24 and 06/10/24.
- Attend ROI Workgroup Call on 06/03/24.
- Attend the Self-Service Portal Committee Meeting on 06/04/24.
- Host SCERFRA Touchpoint on 06/04/24.
- Attend App Dev Meeting on 06/04/24.
- Attend SSP Committee Meeting on 06/04/24.
- Host GCF Parity Prep Call on 06/04/24.
- Attend the CalSAWS-BenefitsCal Demo on 06/04/24.
- Hosted the DDI and M&O Biweekly calls on 06/04/24, 06/06/24, 06/11/24, and 06/13/24.
- Attend GCF Parity List Meeting on 06/05/24.
- Host the BenefitsCal PM Stand-Up Meetings with the Consortium on 06/05/24 and 06/12/24.
- Host the BenefitsCal Enhancement Pipeline Meetings on 06/07/24 and 06/14/24.
- Attend County Validation 24.07 Touchpoints on 06/10/24, 06/11/24, 06/12/24, 06/13/24, and 06/14/24.
- Attend App Dev Call on 06/11/24.
- Attend CFAP Expansion on 06/11/24.
- Host the UCD Monthly Meeting with Advocates and State Partners on 06/12/24.

CalSAWS – BenefitsCal (Portal/Mobile) Bi-Weekly M&O Report

Period: May 20, 2024 to June 2, 2024

Release 24.04.25 Development

- Provided support to SIT teams for the April monthly enhancements.
- Delivered release to production.

Release 24.05.19 Development

- Provided support to SIT and Independent test teams for the May Baseline release enhancements.

Release 24.05.30 Development

- Continued development on the May monthly release enhancements.

The following table outlines the summary of development activities for enhancements.

| Release | Release Date | Summary |
|----------|--------------|---|
| 24.04.25 | 04/25/24 | Delivered to production. |
| 24.05.19 | 05/19/24 | Continued development and provided test and county support. |
| 24.05.30 | 05/30/24 | Continued development and provided test support. |

Table 5.2-1 – BenefitsCal Enhancements Development Status

5.2.3 Activities for the Next Reporting Period – Requirements and Design

Designs and Design Meetings

- Continue design work for 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 BenefitsCal CWDA Check-Ins on 05/06/24 and 05/13/24.
- Host the DDI and M&O Biweekly calls on 05/07/24, 05/09/24, 05/14/24, and 05/16/24.
- Attend Email Whitelisting Call on 05/06/24.
- Attend 24.05 T-2 Project Readiness Call on 05/06/24.
- Host UCD/CX Check-In on 05/07/24.
- Hosted the BenefitsCal PM Stand-Up Meetings with the Consortium on 05/08/24 and 05/15/24.
- Attend ROI Workgroup Meeting on 05/13/24.
- Host Prep for UCD Monthly Meeting on 05/13/24.
- Attend 24.05 T-1 Project Readiness on 05/13/24.
- Attend 24.05 Pre-Green Light Preview Meeting on 05/13/24.
- Attend CFAP Expansion Meeting on 05/14/24.
- Host the UCD Monthly May Meeting with State Partners and Advocates on 05/15/24.
- Host BenefitsCal Pipeline Discussion Meeting on 05/17/24.

5.2.4 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 data from Always-on survey for the month of April.

User Engagement

- Conducted generative research sessions with CBOs for CBO Support Assistance [CSPM-71551].
- Conducted usability testing sessions with customers for Case Link Verification II [CSPM-71920].
- Recruited county workers for ABAWD ACL [CSPM-73600].

Enhancements

- Conducted generative research sessions for CBO Support Assistance [CSPM-71551].
- Conducted usability testing sessions for MFA case linking [CSPM-68189].
- Planned and prepped for ABAWD ACL [CSPM-73600].
- Designed CM Enhancement-YT video [CSPM-68266].
- Designed Language updates for SAR7 due month [CSPM-72205].
- Started design on CF 685 updates [CSPM-71517].
- Finished design for Add FAQ to the Login Section of the help center [CSPM-73623].

Advocate Engagement

- Planned and prepped for May UCDDM Monthly comment log.

5.2.5 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 customers for ABAWD ACL [CSPM-73600].
- Conduct focus groups with country workers for ABAWD ACL [CSPM-73600].

Enhancements

- Finalize Case Link Verification Phase II [CSPM-71920].
- Finalize Login MFA III [CSPM-71750].
- Finalize Language updates for SAR 7 due month [CSPM-72205].
- Finalize CM Enhancement-YT video [CSPM-68266].

- Conduct generative research for ABAWD ACL [CSPM-73600].

Advocate Engagement

- Facilitate May UCD monthly meeting.

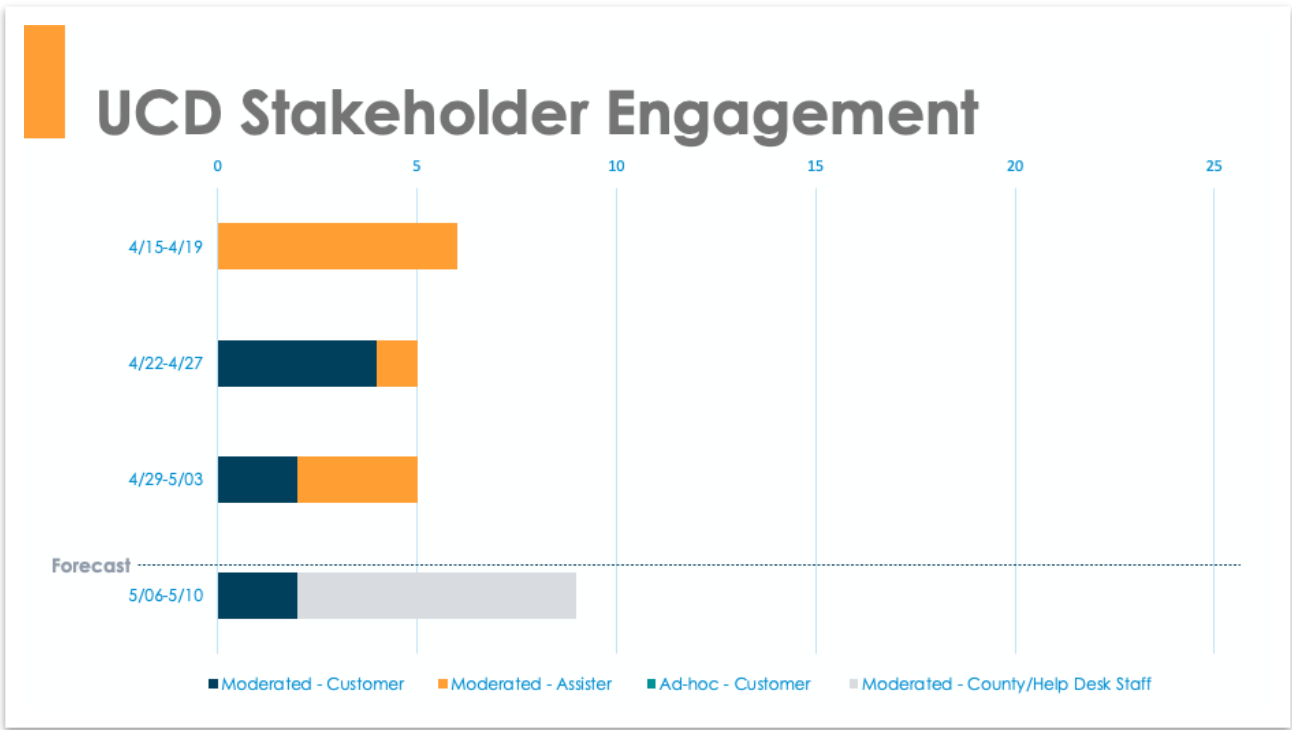


Figure 5.2-2 – UCD Stakeholder Engagement

5.3 Development

5.3.1 Highlights of the Reporting Period – Development

Enhancements (M&E)

| Release | Planned for Week Ending 05/31/24 | Actual for Week Ending 05/31/24 | Total Planned for the Release | Comments |
|------------------|----------------------------------|---------------------------------|-------------------------------|--|
| Release 24.05.19 | 0 | 0 | 1 | Release 24.05.19 was deployed to Production on 05/19/24. |
| Release 24.05.30 | 1 | 0 | 4 | Release 24.05.30 was deployed to Production on 05/30/24. |
| Release 24.06.27 | 1 | 1 | 6 | Release 24.06.27 is planned for deployment on 06/27/24. |

Table 5.3-1 – Enhancement Actuals for Reporting Period

5.3.2 Activities for the Next Reporting Period – Development

Enhancements (M&E)

| Release | Planned for Week Ending 06/14/24 | Total Planned for the Release | Total Completed for the Release | Comments |
|------------------|----------------------------------|-------------------------------|---------------------------------|--|
| Release 24.05.19 | 0 | 0 | 1 | Release 24.05.19 was deployed to Production on 05/19/24. |
| Release 24.05.30 | 0 | 0 | 4 | Release 24.05.30 was deployed to Production on 05/30/24. |
| Release 24.06.27 | 3 | 6 | 1 | Release 24.06.27 is planned for deployment on 06/27/24. |

Table 5.3-2 – 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 June 2024.

5.4 System Test Execution

5.4.1 Highlights of the Reporting Period – System Test Execution

Release 24.05.21 – Emergency May Release

- Deployed Emergency May Release into Production on 05/21/24.

Release 24.05.30 – May Monthly Release

- Deployed Monthly Release into Production on 05/30/24.

5.4.2 Activities for the Next Reporting Period – System Test Execution

Release 24.06.27 – June Monthly Release

- Continue validating the tickets planned for June Monthly Release and co-ordinate with the partners for end-to-end validation.

5.5 User Acceptance Test (UAT) Planning

5.5.1 Highlights of the Reporting Period – User Acceptance Test Planning

UAT Test Execution

- None for the period.

5.5.2 Activities for the Next Reporting Period – User Acceptance Test Planning

Test Support

- None for the period.

5.6 Release Management

5.6.1 Release Test Summary

Release 24.05.21 – Emergency May Release

- Deployed Emergency May Release into Production on 05/21/24.

Release 24.05.30 – May Monthly Release

- Deployed Monthly Release into Production on 05/30/24.

5.6.2 Automated Regression Test (ART) Coverage

The following are the automated regression scripts executed for regression in BenefitsCal for Release 24.05.30.

| Release | # of Scenarios Executed | # of Scenarios Passed | # of Scenarios Failed | Overall Pass% | Pass of Executed | Coverage |
|----------|-------------------------|-----------------------|-----------------------|---------------|------------------|--|
| 24.05.30 | 42 | 42 | 0 | 100 | 100 | CalFresh (CF), CalWORKs, Medi-Cal (MC), General Assistance or General Relief (GA/GR), and Disaster CalFresh programs with the Apply for Benefits, Report Change, Renewal, and Recertification for the MC, CF, GA/GR, and SAR 7 flows, IRT (Income Reporting Threshold), TWI along with Appointments, Administrative, ROI not enabled, E-Signature, Global Search, static validations, EBT2259 and CF303 are covered by automated regression. |

Table 5.6-1 – Automated Regression Scripts Executed in BenefitsCal

Note: Automated regression tests are run for each planned release. Automated regression tests are excluded for emergency releases as the window for execution is short. The regression suite is revisited after each major release and periodically updated once new application functionality has been released. The update could be adding a new script to the repository or modifying an existing script to cover new functionality since the new functionality replaces the old functionality. New functionality will be called out in the coverage column.

5.7 Training Materials Update

None for the reporting period.

5.8 Deviation from Plan/Adjustments

None for the reporting period.

6.0 Performance Test

6.1 Highlights of the Reporting Period – Performance Test

Release 24.06.27 – June Monthly Release

- The BenefitsCal team has identified one (1) enhancement ‘Add the CF 385 (application for disaster CalFresh) to Form API’ as scope for the June monthly release performance testing. The team will work to develop the script related to the enhancement in scope and update other scripts as per the latest codebase. The performance tests are planned with mock services.

| Cycle | Start Date | End Date | Scope | Test Cases Status | Execution Status |
|-------|------------|----------|---|---|------------------|
| 13 | 05/20/24 | 06/21/24 | Release 24.06.27 – June Monthly Release | Scope: The BenefitsCal June 2024 monthly release has 1 enhancement “Add the CF 385 (Application for Disaster CalFresh) to Forms API” and Performance testing is planned for entire suite including all the scripts. Executions: BenefitsCal isolated Load tests with mock services: Monday, June 17 Tuesday, June 18 | 20% |

Table 6.1-1 – Performance Test Cycles and Test Case Status

7.0 Security

7.1 User Conversion

7.1.1 Highlights of the Reporting Period – User Conversion Testing

- No updates for this reporting period.

7.1.2 Activities for the Next Reporting Period – User Conversion Testing

- No updates for this reporting period.

7.2 Security

7.2.1 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 05/24/24 and 05/31/24.

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 05/31/24.

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 04/28/24 to review the reported findings, analysis details and planned remediation activities.

7.2.2 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.

8.0 Communications and Training

8.1 Highlights of the Reporting Period

- No activities for the reporting period.

8.2 Activities for the Next Reporting Period

- No activities for the reporting period.