

CalSAWS BenefitsCal
(Portal/Mobile) Biweekly
Status Report

Reporting Period: April 22, 2024 to May 5, 2024

CalSAWS – BenefitsCal (Portal/Mobile) Weekly Status Report

Weekly Status Report, May 8, 2024

Period: April 22, 2024 to May 5, 2024

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
<p>May Enhancements (Release 24.05)</p>	<ul style="list-style-type: none"> ➤ Eight (8) enhancements will be 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-71734: Change FR Integration Points. ○ Three (3) 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. ▪ CSPM-73689: SSA Web Page for SSA Metrics. ○ Two (2) 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.
<p>OCM Activities to Enable Case Linking functionality</p>	<ul style="list-style-type: none"> ➤ Hypercare Support <ul style="list-style-type: none"> ○ Conducted Daily Calls with Counties after implementation (04/26/24 – 05/02/24) ➤ Recorded Training sessions with Counties and CBOs. <ul style="list-style-type: none"> ○ Case link MFA – County Staff Training (04/16/24). ○ Case link MFA – CBO Awareness Webinar (04/17/24). ➤ Completed the below items for the 04/25/24 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

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	<ul style="list-style-type: none"> ▪ Informational Flyer (CalSAWS.org/BenefitsCal) – 04/24/24. ▪ FACT Sheet (CIT 0065-24) – 04/25/24. ▪ Quick Reference Guide (CalSAWS.org/BenefitsCal). ▪ Job Aid (CIT 0063-24) – 04/22/24. ○ 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]. ➤ 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 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 <ul style="list-style-type: none"> ○ Planned and prepped for May UCDCM Monthly comment log.

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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 05/01/24 with the CDSS, Consortium, and CWDA on Premise funding and open items. ➤ 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. ➤ 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 May 24.05 baseline release (Development completed; SIT Completed, UAT, and County Validation is In Progress).

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2 PMO

1.2.1 Highlights of the Reporting Period

Deliverables and Work Products submitted:

- FWP 24.23: CX Bimonthly Report (Feb/Mar 2024) on 04/22/24.
- FWP 25.26: Monthly M&O Report – March 2024 on 04/22/24.

1.2.2 Activities for the Next Reporting Period

Deliverable and Work Product submissions for next reporting period:

- FWP 28.25: BenefitsCal Work Plan Monthly Updates – April 2024 on 05/07/24.
- FWP 29.25: BenefitsCal Monthly Status Report – April 2024 on 05/07/24.

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1.3 BenefitsCal Collaboration Model (CM)

1.3.1 Highlights of the Reporting Period

- Analysis In Progress for 7 Prioritized Items from 2024 Q1
- 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	In Progress	Prioritized for April-May 2024.
Research Item	CSPM-71962	Duplicate applications	In Progress	Prioritized for April-May 2024.
Enhancement	CSPM-67785	Update Document Type/ Upload feature	Closed	Deployed to Production
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	Prioritization Approved	Analysis In Progress; Prioritized for May 2024.
Research Item	CSPM-71552	Orange Banner	Not Started	Prioritized for August 2024
Research Item	CSPM-68269	Display Race Options in Alphabetical Order	Request For Estimation	Prioritized for June 2024; estimation in progress.
Enhancement	CSPM-67761	Update Application and RE/SAR 7 Status Tracker	Prioritization Needed	Tentatively prioritized for August 2024.

Table 1.3-1 – Enhancements Updates, Prioritized by CM

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1.3.2 Activities for the Next Reporting Period

- Prioritize Collaboration Model Items for future releases.
- Perform design, development, and implementation analysis for enhancements and research action items identified in the Collaboration Model.

The table below contains all enhancements prioritized by CM (not yet delivered to production) and planned activities for the next week.

Issue Type	ID	Summary	Activity for Next Week	Target Delivery Date
Research Item	CSPM-71555	BenefitsCal Email Notifications	Finish Research with Policy	05/08/24
Research Item	CSPM-71551	CBO Support Assistance	Finish Research with CBOs	05/08/24
Research Item	CSPM-71962	Duplicate applications	Finish Research with Caseworkers	05/08/24
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
Enhancement	CSPM-68111	Display Help Text for Customers when Case does NOT link automatically	Continue with Implementation	05/30/24
Research Item	CSPM-71552	Orange Banner	N/A	08/31/24
Research Item	CSPM-68269	Display Race Options in Alphabetical Order	Plan for Design	06/27/24
Enhancement	CSPM-67761	Update Application and RE/SAR 7 Status Tracker	N/A	06/27/24
Enhancement	CSPM-67761	Update Application and RE/SAR 7 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**
 - Finalized design work for April 2024 enhancements.
 - Continued design work for May 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 04/22/24 and 04/29/24.

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- Attended the 24.05 County Validation touchpoint call on 04/22/24, 04/23/24, 04/24/24, 04/25/24, 04/26/24, 04/29/24, 04/30/24, 05/01/24, 05/02/24, and 05/03/24.
- Hosted the DDI and M&O Biweekly calls on 04/23/24, 04/25/24, 04/30/24, and 05/02/24.
- Attended CFAP Expansion Meeting on 04/23/24.
- Attended EBT 2259 User Group on 04/24/24.
- Hosted SCERFRA Discussion on 04/24/24.
- Attended Case link Phase 2 Design Discussion on 04/24/24.
- Hosted the BenefitsCal PM Stand-Up Meetings with the Consortium on 04/24/24 and 05/01/24.
- Attended SIRFRA Discussion on 04/25/24.
- Hosted BenefitsCal Pipeline Discussion on 04/26/24.
- Attended ROI Workgroup Meeting on 04/29/24.
- Attended Alternate Formatted Forms Discussion SCERFRA on 04/29/24.
- Cohosted BenefitsCal Demo with FNS on 04/30/24.
- Attended BenefitsCal Security Incident Update with Advocate Co-leads on 04/30/24.
- Attended GCF Parity Meeting on 05/01/24.
- Attended Accelerated Enrollment Prep Session on 05/01/24.
- Hosted BenefitsCal Case Link MFA Phase 2 Design Review on 05/02/24.
- Cohosted 24.07 Planning Discussions on 05/02/24.
- Hosted BenefitsCal Pipeline Discussion Meeting on 05/03/24.

2.1.2 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.

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- 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.

2.1.3 Highlights of the Reporting Period – User Centered Design (UCD)

➤ Customer Experience (CX) Measurements Data

- Monitored the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues.
- Analyzed 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 UCDCM Monthly comment log.

2.1.4 Activities for the Next Reporting Period – UCD

➤ CX Measurements Data

- Monitor the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues.

➤ User Engagement

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

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➤ **Enhancements**

- Finalize Case Link Verification Phase II [CSPM-71920].
- Finalize Login MFA III [CSPM-71750].
- Finalize Language updates for SAR7 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.

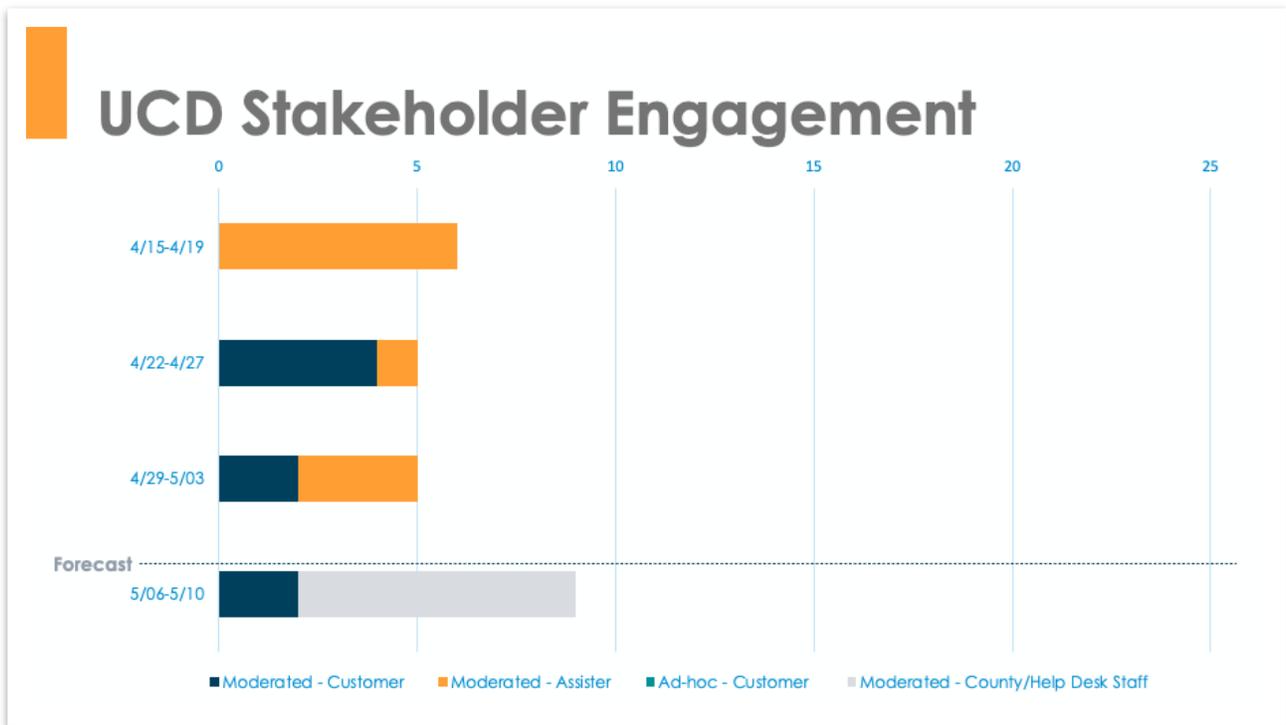


Figure 2.1-1 – UCD Stakeholder Engagement

2.2 Development

2.2.1 Highlights of the Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 05/03/24	Actual for Week Ending 05/03/24	Total Planned for the Release	Comments
Release 24.04.25	0	2	2	Release 24.04.25 was deployed to production on 04/25/2024

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Release	Planned for Week Ending 05/03/24	Actual for Week Ending 05/03/24	Total Planned for the Release	Comments
Release 24.05.19	0	0	1	(SSA Form) CSPM-67651 is planned for Release 24.05.19. Development is completed, and testing is in progress.
Release 24.05.30	1	0	4	Release 24.05.30 is planned for 24/30/05. CSPM-71734 is moved to Release 24.06.13

Table 2.2-1 – Enhancement Actuals for Reporting Period

2.2.2 Activities for the Next Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 05/17/24	Total Planned for the Release	Total Completed for the Release	Comments
Release 24.04.25	0	2	2	Release 24.04.25 was deployed to production on 04/25/2024
Release 24.05.19	0	0	1	(SSA Form) CSPM-67651 is planned for Release 24.05.19. Development is completed, and testing is in progress.
Release 24.05.30	1	0	4	Release 24.05.30 is planned for 24/30/05. CSPM-71734 is moved to Release 24.06.13

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 April 2024.

2.3 System Test Execution

2.3.1 Highlights of the Reporting Period – System Test Execution

➤ Release 24.04.25 – April Monthly Release

- Deployed April Monthly Release into Production on 04/25/24.

➤ Release 24.05.19 – May Baseline Release

- Continued to test and support the BenefitsCal SSA flow for the May baseline release.

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2.3.2 Activities for the Next Reporting Period – System Test Execution

- **Release 24.05.19 – May Baseline Release**
 - Deploy May Baseline into Production on 05/19/24.

2.4 User Acceptance Test (UAT) Planning

2.4.1 Highlights of the Reporting Period – User Acceptance Test Planning

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

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

- **Test Support**
 - None for the period.

3.0 Performance Test

3.1 Highlights of the Reporting Period – Performance Test

- **Release 24.05.50 – May Monthly Release**
 - The BenefitsCal team has shown two (2) major enhancements as scope for the May release performance testing. Two (2) new scripts to implement the SSA assisted applications will be developed and all other scripts will be updated for the new ForgeRock API's integration endpoint. One (1) SSA AFB submission script is completed, and the team executed one (1) round of testing. Further scripts enhancements are planned in the next week followed by another round of tests.

Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	04/22/24	05/17/24	Release 24.05.30 – May Monthly Release	Scope: The BenefitsCal May 2024 monthly release has two (2) major enhancements implementation. Two (2) new scripts to implement the SSA-assisted applications will be developed and all other scripts will be updated to incorporate the new ForgeRock API's integration endpoint. Executions: BenefitsCal isolated Load tests with mock services: Monday, April 29 (Completed) Monday, May 13	50%

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

4.0 Security

4.1 User Conversion

4.1.1 Highlights of the Reporting Period – User Conversion Testing

- No updates for this reporting period.

4.1.2 Activities for the Next Reporting Period – User Conversion Testing

- No updates for this reporting period.

4.2 Security

4.2.1 Highlights of the Reporting Period – Security

- **SAST**
 - Executed the weekly Static Application Security Testing (SAST) of the application source code and shared the analysis of the security scan reports with the BenefitsCal Development Team for remediation on 04/26/24 and 05/03/24.
- **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 05/03/24.
- **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 04/30/24 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.

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5.0 Communications and Training

5.1 Highlights of the Reporting Period

- No activities for the reporting period.

5.2 Activities for the Next Reporting Period

- No activities for the reporting period.

6.0 Appendices

6.1 Appendix A – Deliverable Summary

Deliverable Status by Submission

		Complete	Coming Soon	WAC Approval Pending		
DEL ID	Deliverable Name	DDED	FDED	DDEL	FDEL	Final Approval
None for the reporting period.						

Table 6.1-1 – Deliverable Status for Current Reporting Period

Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
None for the reporting period.			

Table 6.1-2 – Upcoming Deliverable Deadlines

Work Product Status by Submission

		Complete	Coming Soon	WAC Approval Pending	
ID	Work Product Name	DWP	FWP	Final Approval	
24.23	CX Bimonthly Report (Feb/Mar 2024)	04/10/24	04/22/24	05/01/24	
25.26	BenefitsCal Monthly M&O Report – March 2024	04/09/24	04/22/24	04/29/24	
28.24	BenefitsCal Work Plan Monthly Updates – March 2024	N/A	04/05/24	04/16/24	
28.25	BenefitsCal Work Plan Monthly Updates – April 2024	N/A	05/07/24	05/16/24	
29.24	BenefitsCal Monthly Status Report – March 2024	N/A	04/05/24	04/16/24	
29.25	BenefitsCal Monthly Status Report – April 2024	N/A	05/07/24	05/16/24	

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
28.25	BenefitsCal Work Plan Monthly Updates – April 2024	On Track	FWP submission 05/07/24 FWP approval 05/16/24
29.25	BenefitsCal Monthly Status Report – April 2024	On Track	FWP submission 05/07/24 FWP approval 05/16/24

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. 	Open	Low	Medium	05/10/21

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>CDSS, CWDA and Consortium will provide 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 				

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Weekly Status Report, May 8, 2024

Period: April 22, 2024 to May 5, 2024

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

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

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<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. • 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. 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<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 01/03/2024. 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. 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<ul style="list-style-type: none"> • 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. 				
290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers	Recently issued Release of Information (ROI) policy is not detailed enough, nor is it consistent between the two state Departments (CDSS and DHCS). The policy as written may create customer information privacy/security, safeguard and county operations concerns, and liabilities. As the policy was released after the completion of ROI design, development, and testing of the functionality in BenefitsCal and CalSAWS, counties have not had sufficient time to assess the ROI functionality with the high-level policy and to be able to determine impacts to their county operations and the associated alignment with the existing BenefitsCal/CalSAWS design. The policy as written does not give clear direction on County responsibilities associated with the establishment of CBO agreements, provisions of those agreements and monitoring of CBO compliance with the agreements. Counties also have not had sufficient time to be able to determine if their current CBO agreement language is adequate and includes provisions and protections to further protect customer information when being accessed by CBOs via BenefitsCal. BenefitsCal/CalSAWS initial design and implementation has been postponed until final/revised policy is issued by both CDSS and DHCS and there is operational clarity agreed to by all parties.	Open	Medium	High	05/19/23

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<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> <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>				

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

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>Additional chart for responsibilities in progress to cover scenarios when contracts in place or not. This chart is to be included in future letter.</p> <ul style="list-style-type: none"> 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 needed to determine the implementation timeline has been discussed. Next work group meetings are planned for 03/18/24, and 04/08/24. 				
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>	Open	Low	Low	03/18/24

Table 6.2-1 – Project Risks and Issues

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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
0062-24	Notify.All; usbenefitscaldevops@deloitte.com; operator@calheers.ca.gov; HoweG@CalSAWS.org; QuijadaP@CalSAWS.org; TombakianM@CalSAWS.org; tech.productionoperations@calsaws.org; Bill.Kelly@fisglobal.com; CalSAWS.All	Scheduled CalSAWS Maintenance - System Downtime Notification – 4/28/2024	CalSAWS M&E	04/22/24	Anand Kulkarni	Pete Quijada
0063-24	PPOCs (All); Regional Managers (All); Self-Service-Portal Committee (All); Training Committee (All)	CA-276107 Update JA – Self-Service Portal (SSP) – Case Link Requests Due to CA-261398	CalSAWS M&E	04/22/24	Dymas Pena	Laura Ould
0065-24	PPOCs (All); Regional Managers (All)	BenefitsCal Fact Sheet for Case Linking and MFA Case Linking Verification	CalSAWS M&E	04/25/24	Marsale Eramya	Carrie White
0067-24	Notify.All; usbenefitscaldevops@deloitte.com; operator@calheers.ca.gov; HoweG@CalSAWS.org; QuijadaP@CalSAWS.org; TombakianM@CalSAWS.org; tech.productionoperations@calsaws.org; Bill.Kelly@fisglobal.com; CalSAWS.All	Scheduled CalSAWS Maintenance – System Downtime Notification – 5/12/2024	CalSAWS M&E	04/30/24	Anand Kulkarni	Pete Quijada
0068-24	Notify.All; usbenefitscaldevops@deloitte.com; operator@calheers.ca.gov; HoweG@CalSAWS.org; QuijadaP@CalSAWS.org; TombakianM@CalSAWS.org; tech.productionoperations@calsaws.org; Bill.Kelly@fisglobal.com; CalSAWS.All	Scheduled CalSAWS Maintenance - System Downtime Notification – 5/19/2024	CalSAWS M&E	05/02/24	Anand Kulkarni	Pete Quijada

Table 6.3-1 – CITs

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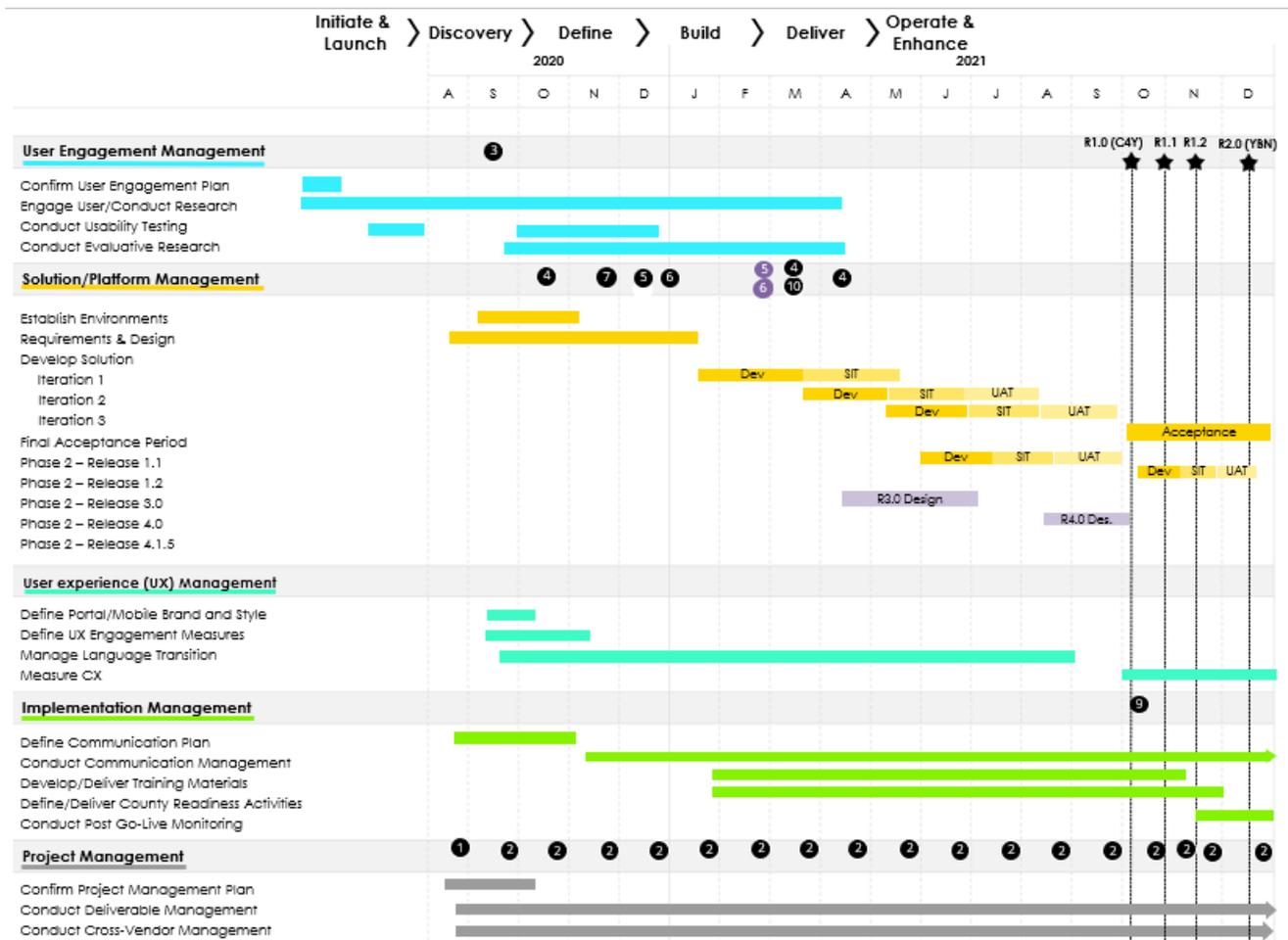
The following table outlines CalSAWS Requests for Information (CRFIs) distributed or with a response due date within the reporting period.

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

Table 6.3-2 – CRFIs

6.4 Appendix C – Project Work Plan Reports

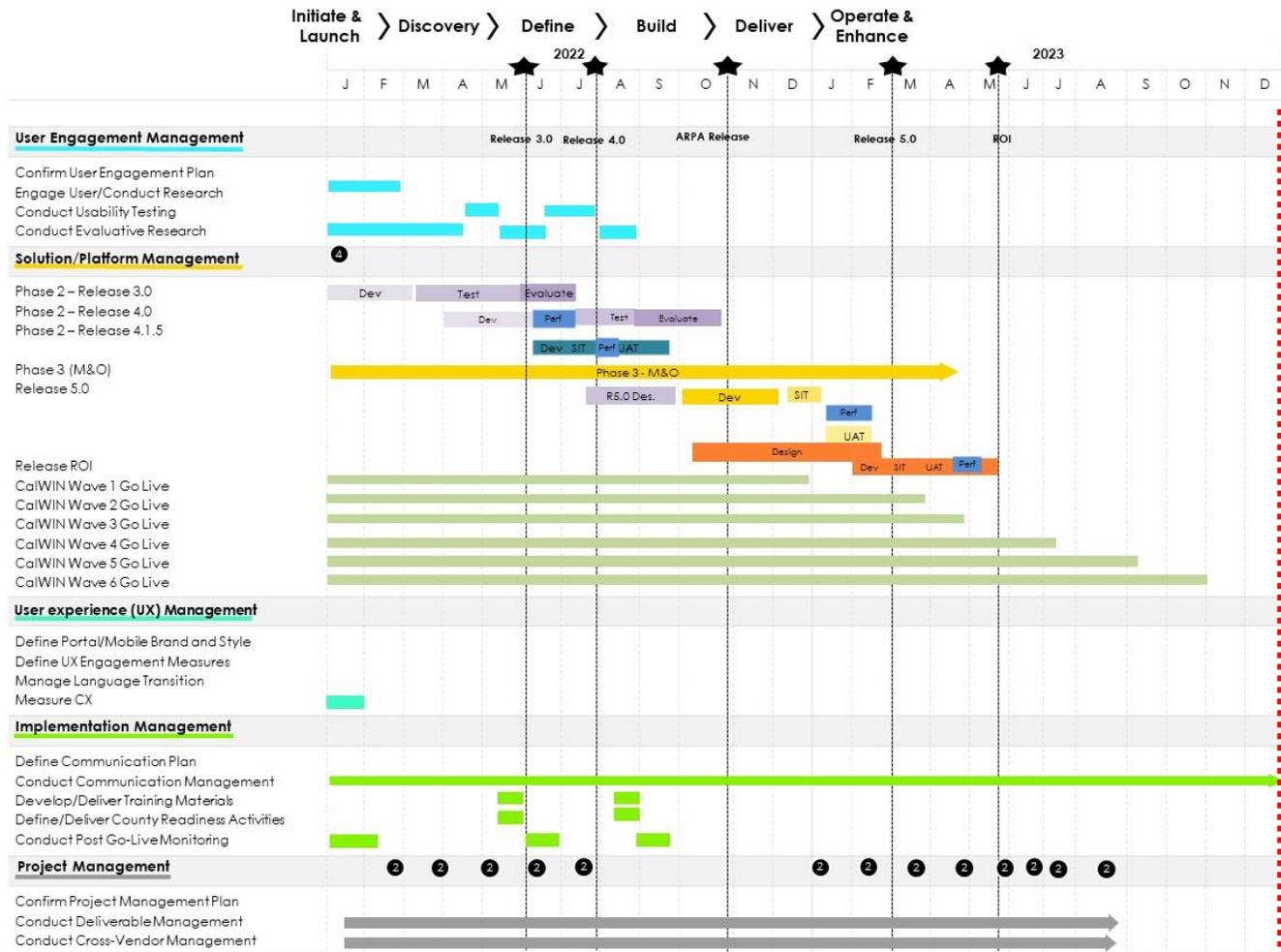
Project Timeline



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Project Action Items – Overdue

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

ID	Description	Owner	Due Date
None.			

Table 6.4-1 – Overdue Action Items