

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

Reporting Period: July 29, 2024 to August 11, 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 Priority Release 24.08.11 on 08/11/24
4.2	Upcoming BenefitsCal Monthly Release 24.08.29 on 08/29/24
August Enhancements (Release 24.08.29)	<ul style="list-style-type: none"> ➤ Six (6) enhancements will be delivered to Production in August 2024 Monthly Release: <ul style="list-style-type: none"> ○ One (1) Policy Enhancement: <ul style="list-style-type: none"> ▪ CSPM-69828: Update link for Register to Vote on the Home page and Help page. ○ One (1) Technical Enhancement: <ul style="list-style-type: none"> ▪ CSPM-74664: Runtime upgrade of python lambdas from 3.8. ○ One (1) Collaboration Model Enhancement: <ul style="list-style-type: none"> ▪ CSPM-68266: Link to YouTube Videos on the dashboard and banner. ○ Two (2) Partner Support Enhancements: <ul style="list-style-type: none"> ▪ CSPM-69825: Update Student Info Mapping in App Transfer. ▪ CSPM-74427: Restrict the number transactions reported on EBT 2259 to 126. ○ One (1) Technical Enhancement: <ul style="list-style-type: none"> ▪ CSPM-71737: Technical improvement to limit the data available in a browser session
GCF Parity Items	<ul style="list-style-type: none"> ➤ Premise approved and planning in progress for the below Parity items: ➤ #22, 44: Immigrant specific help and FAQs <ul style="list-style-type: none"> ○ CDSS CF provided written confirmation on 06/12/24 stating that BenefitsCal Recommendations will meet the Gap, also provided with the links to be added for Immigrants in the Help Center. ➤ #24: Update CalFresh Application Flow to reduce questions <ul style="list-style-type: none"> ○ CDSS CF provided written confirmation on 08/08/24 stating they agree with the BenefitsCal Recommendations. ➤ #30, 32: Release of Information <ul style="list-style-type: none"> ○ Contingent on the ROI workgroup outcomes. ➤ #34: CDSS CF Prime Contractor Reports <ul style="list-style-type: none"> ○ CDSS CF provided written confirmation on 06/12/24 stating that BenefitsCal Recommendations will meet the gap. ➤ #46, 51: Automated reminder emails and text messages for customers <ul style="list-style-type: none"> ○ BenefitsCal provided the baseline used for providing the SCERFRA response and the recommendations to CDSS. ○ CDSS confirmed the recommendations would meet the gap in the GCF Parity meeting held on 07/10/24.

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STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
	<ul style="list-style-type: none"> ➤ #52: Update utilities options for CalFresh applicants in BenefitsCal <ul style="list-style-type: none"> ○ Assumptions confirmed by CDSS CF on 10/03/23. ➤ #55: Suggest SAR 7 documents to be uploaded by the customers in BenefitsCal <ul style="list-style-type: none"> ○ Assumptions confirmed by CDSS CF on 10/03/23.
<p>User Centered Design (UCD) Activities</p>	<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 Always on survey data for the month of July. ➤ User Engagement <ul style="list-style-type: none"> ○ Conducted CBO and county staff generative research sessions for document upload: List of options [CSPM: 71544]. ○ Conducted CBO and county staff generative research sessions for document upload: Multiple Docs [CSPM: 71543]. ○ Conducted usability testing for ABAWD ACL [CSPM-73600]. ➤ Enhancements <ul style="list-style-type: none"> ○ Continued designs for ABAWD. ○ Finalized designs for Restrict the number transaction reported on EBT2259 to 126 [CSPM-74427]. ○ Continued designs for Restrict BIC replacement requests [CSPM: 64211]. ○ Continued designs for Login MFA Phase 3 [CSPM-71750]. ○ Conducted CBO County staff generative research sessions for document upload: List of options [CSPM: 71544]. ○ Conducted CBO and county staff generative research sessions for document upload: Multiple Docs [CSPM: 71543]. ○ Synthesized generative research findings for document upload: List of options [CSPM: 74427] ○ Synthesized generative research findings for document upload: Multiple Docs [CSPM: 71543] ➤ Advocate Engagement <ul style="list-style-type: none"> ○ Responded to July UCD Monthly Meeting comment log. ○ Prepared for and facilitated ABAWD design session with Advocates

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

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1.2 BenefitsCal Project Status Dashboard

Topic	Status	Highlights
Availability		The BenefitsCal System did not experience any unplanned outages.
Defects		There are twenty-one (21) active Production defects.
Incidents		There are five (5) 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** – The BenefitsCal Team successfully deployed Priority Release **24.08.11** to BenefitsCal Production.
- **Emergency Release** – None for the reporting period.
- **Monthly Release** – None for the reporting period.

Planned Outages

- Sunday, 08/11/24 8:00 pm PST to 9:00 pm PST
- Priority Release 24.08.11

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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 25.29	Monthly M&O Report – July 2024	M&O		DWP submitted 08/09/24 FWP submission 08/22/24 FWP approval 08/29/24
WP 28.28	BenefitsCal Work Plan Monthly Updates – July 2024	PMO		FWP submitted 08/07/24 FWP approval 08/16/24

[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:

- DWP 25.30: Monthly M&O Report – July 2024 on 08/09/24.
- FWP 28.28: BenefitsCal Work Plan Monthly Updates – July 2024 on 08/07/24.

2.1.3 Activities for the Next Reporting Period

Deliverable and Work Product submissions for next reporting period:

- DWP 24.25: CX Bimonthly Report (June/July 2024) on 08/12/24.
- FWP 24.25: CX Bimonthly Report (June/July 2024) on 08/22/24.
- FWP 25.30: Monthly M&O Report – July 2024 on 08/22/24.

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
0124-24	Notify.All; usbenefitscaldevops@deloitte.com; operator@calheers.ca.gov;	CalSAWS M&E	Scheduled Downtime Notification – 8/17/2024	08/05/24	Anand Kulkarni	Pete Quijada

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CIT ID	To	Category	Subject	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
	HoweG@CalSAWS.org; QuijadaP@CalSAWS.org; TombakianM@CalSAWS.org; tech.productionoperations@calsaws.org; Bill.Kelly@fisglobal.com;CalSAWS.All					

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

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

ID	Title	Details	Status	Risk Level	Severity	Date Logged
246	Perceived Gap in Functionality	A perceived gap in functionality between GetCalFresh and BenefitsCal was identified. Select features identified within GetCalFresh are not present within BenefitsCal as they are not part of the project requirements, and change requests were logged to address. Impacts BenefitsCal adoption by Community Partners may be lower as they rely on features (like the referral code) to complete their work. The future migration from GCF to	Open	Low	Medium	05/10/21

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>BenefitsCal in 2022 is at risk until features are added to BenefitsCal.</p> <p>Status Updates:</p> <p>September 2, 2022:</p> <ul style="list-style-type: none"> Had multiple meetings with CDSS to discuss the GetCalFresh Gap List with Consortium and CWDA, latest on 08/29/22. There is a biweekly meeting cadence. Currently there are few enhancement suggestions from CDSS on partial gaps. Teams are going to continue having working sessions to decide any of these must have or nice to have. <p>September 30, 2022:</p> <ul style="list-style-type: none"> Continued working sessions with CDSS, CWDA, Consortium and CalSAWS. With the CDSS's analysis, there is total of 41 gaps. 32 are logged as enhancements for prioritization and the remaining 9 will be discussed at upcoming working sessions. There is also a plan to identify/classify must have vs nice to have items. Next working session is scheduled for 10/05/22. <p>January 6, 2023:</p> <ul style="list-style-type: none"> BenefitsCal team has started working on the effort estimations for the gaps list (31 gaps/52 enhancements). Targeting to complete the estimations by 01/16 and propose prioritization. CDSS, CWDA and Consortium will provide 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>				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<ul style="list-style-type: none"> Attended meeting with CDSS, CalSAWS, and CWDA for the GCF Parity List on 02/02/23. Provided responses to CDSS SCERFRA with estimates for GCF parity list items. <p>March 3, 2023:</p> <ul style="list-style-type: none"> RMG: Attended meeting with CDSS, CalSAWS, and CWDA for the GCF Parity List on 03/01/23. CDSS to confirm the SCERFRA approval and prioritization to establish a roadmap for implementation. <p>April 7, 2023</p> <ul style="list-style-type: none"> Attended meetings with CDSS, CalSAWS, and CWDA for the GCF Parity List on 03/22/23 and 04/05/23. CDSS shared decommissioning timeline got GCF components/CDSS will map the components planned for decommissioning to parity list items to confirm the SCERFRA approval, funding source and prioritization to establish a roadmap for implementation. <p>April 28, 2023:</p> <ul style="list-style-type: none"> Attended meetings with CDSS, CalSAWS, and CWDA for the GCF Parity List on 03/22/23 and 04/19/23. CDSS is currently mapping the components planned for decommissioning to parity list items and will confirm the SCERFRA approval for SCERFRA 23-512. CDSS is also confirming the funding source to establish a roadmap for implementation. Next meeting is scheduled on 05/03/23. <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 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>Services (CDSS) continued mapping the components planned for decommissioning to the parity list items.</p> <p>June 9, 2023:</p> <ul style="list-style-type: none"> BenefitsCal and CalSAWS teams connected with ODI on Friday 06/09/23. Next steps identified for ODI to provide the raw data from GCF to begin the analysis. <p>June 30, 2023:</p> <ul style="list-style-type: none"> Biweekly meeting conducted with CDSS, CWDA, Consortium and CalSAWS on 06/21/23. CDSS to provide final list of excel extract of items based on legislative response. Also, teams continued to work with ODI team on the analysis and data needs/questions. <p>July 28, 2023:</p> <ul style="list-style-type: none"> A working session is scheduled for 08/02/23 to talk about SCERFRA 23-500, SCERFRA 23-512 (SSA flow) and CF 303 – Benefit Replacement with CDSS, CWDA, Consortium and CalSAWS. <p>September 1, 2023:</p> <ul style="list-style-type: none"> Multiple working sessions have been facilitated by CDSS with participation by CWDA, Consortium, BenefitsCal, and CalSAWS. Since August 02, 2023, out of 26 items, 4 items have been closed, 4 items are in-plan. 9 items are awaiting confirmation/ response by CDSS and another 9 are scheduled to be discussed 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 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>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> <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 facilitated on 10/04/23 with participation from CWDA, Consortium, BenefitsCal and CalSAWS. 1 item is resolved, and 8 items are remaining where CDSS and CFA to provide confirmation to finalize. <p>November 3, 2023:</p> <ul style="list-style-type: none"> Participated in sessions facilitated by CDSS on 11/01/23, with participation from CWDA, 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>				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<ul style="list-style-type: none"> • Work order # 14 is submitted on 10/23/23 including the following items: <ul style="list-style-type: none"> ○ GCF Parity#20: CalFresh Application "Joint Processing" by Social Security Administration and County Welfare Departments in BenefitsCal – Development and Implementation ○ GCF Parity#31: CF303 ○ GCF Parity#9: Vaccination ○ GCF Parity#19: Self Employment Help Text ○ GCF Parity#63 Language Specific URLs <p>December 1, 2023:</p> <ul style="list-style-type: none"> • Work order 14 is presented during JPA board meeting in November 2023. • BenefitsCal and CalSAWS teams provided the revised version of the estimates for the SCERFRA 23-500 including the 5 parity items (#s 22, 38, 44, 52, 55) on 11/17/23. • CDSS is currently reviewing the estimates. • Next working sessions is scheduled on 12/06/23. • 4 items are pending clarification from CDSS & CFA before proceeding forward. <p>December 15, 2023:</p> <ul style="list-style-type: none"> • Working session conducted on 12/06/23. • Four (4) items are pending clarification from CDSS and CFA before proceeding forward. The BenefitsCal and CalSAWS teams 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 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>in progress for the items documented in Work Order #14.</p> <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 items pending CFA to confirm final disposition and next steps. <p>March 8, 2024:</p> <ul style="list-style-type: none"> • A working session was conducted on 03/06/24 with the CDSS, Consortium, and CWDA on Premise funding for implementation timeline. • Premise planning discussions continued with the CDSS, Consortium, and CWDA for the four (4) parity items #22, #34, #44, #52, and #55 (where the BenefitsCal and CalSAWS teams provided the revised version of the estimates in November 2023) • 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. 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<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, and #63 implemented and deployed to production with the 24.01 release in January 2024. • 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 05/01/24 with 				

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		<p>CDSS, Consortium on open items Item #20 (SSA Assisted Apps) is on schedule to be delivered with the May 24.05 baseline release.</p> <ul style="list-style-type: none"> • 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. <p>May 17, 2024:</p> <ul style="list-style-type: none"> • Next meeting is scheduled on 6/5/2024 with CDSS, Consortium, CWDA and CalSAWS on the open items. • SSA Assisted Apps (item #20) deployed to production on 05/19/2024. • Discussions will continue for the closure of remaining (3) parity items #24, #46, and #51 <p>May 31, 2024:</p> <ul style="list-style-type: none"> • Next meeting is scheduled on 6/5/2024 with CDSS, Consortium, CWDA and CalSAWS on the open items. <p>June 14, 2024:</p> <ul style="list-style-type: none"> • Working session is conducted with CDSS, CWDA and Consortium on 6/5/2024. • CDSS will confirm how to proceed on SCERFRA for Item #55 – Pre-pop SAR 7 • For Item #22, #34 and #44, CDSS CalFresh confirmed that the recommendations and assumptions meet the gap Items #30, 32 are contingent on the ROI workgroup outcomes. • Next working session is scheduled on 07/03/2024. <p>June 28, 2024:</p> <ul style="list-style-type: none"> • Funding and Prioritization meeting facilitated by CDSS on 6/28/24. Next working session is scheduled on 07/03/2024. 				

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		<p>July 12, 2024:</p> <ul style="list-style-type: none"> • Working session is conducted with CDSS, CWDA and Consortium on 7/10/2024. • Items #46, 51: Automated reminder emails and text messages for customers. CDSS confirmed the recommendations would meet the gap in the GCF Parity meeting held on 7/10/2024. • Item #24: Update CalFresh Application Flow to reduce questions, CDSS CF will provide their review of the recommendations by July 2024. • Items #30, 32: Release of Information, this item is Contingent on the ROI workgroup outcomes. • Next working session is 08/07/2024. 				
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/	Open	Medium	High	05/19/23

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

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Period: July 29, 2024 to August 11, 2024

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

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

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>any other policy clarifications or guidance that may be needed to help support counties and public.</p> <ul style="list-style-type: none"> • 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. <p>May 17, 2024:</p> <ul style="list-style-type: none"> • Workgroup session is scheduled on 05/20/2024. Agenda items includes the progress on the ACL letters, CBOs readiness and potential system changes for BenefitsCal and CalSAWS. In the month of June, a workgroup session is scheduled on 06/10/2024. <p>May 31, 2024:</p> <ul style="list-style-type: none"> • Workgroup session conducted on 05/20/2024. Group continued reviewing the use cases and applicant and beneficiary scenarios requiring policy clarifications. • Next meeting is scheduled for June 10, 2024. <p>June 14, 2024:</p> <ul style="list-style-type: none"> • The workgroup session scheduled on June 10, 2024, is cancelled since the draft policy letters from DHCS and CDSS are pending. <p>June 28, 2024:</p> <ul style="list-style-type: none"> • Updated trigger date to July 31, 2024, to re-evaluate the risk once 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>the draft policy letters from DHCS and CDSS are published.</p> <p>July 12, 2024:</p> <ul style="list-style-type: none"> • Draft policy letters have been shared for stakeholder review, input due 7/10/24. • CDSS and DHCS will share the final policy after reviewing the inputs from the stakeholders. • ROI Workgroup meeting conducted on 7/8/24. • Next workgroup session is on 7/29/24. 				
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> <p>Status Updates:</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 	Open	Low	Low	03/18/24

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		<p>of the IVR user verification process.</p> <ul style="list-style-type: none"> • 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. <p>May 17, 2024:</p> <ul style="list-style-type: none"> • BenefitsCal: Developed a series of system changes to mitigate the risks of unauthorized access to their BenefitsCal account and case information. There is a two-phase approach, the first was implemented April 25, 2024, Multi-factor authentication and Case Linking with email, the second phase is scheduled for implementation on May 30, 2024, for Multi-factor authentication and Case Linking with phone as an option. IVR: Analysis of IVR solution authentication process against NIST 800-63A requirements has been initially drafted by the Accenture team, pending review from Consortium Security to align on analysis and subsequent procedures to close the risk. <p>May 31, 2024:</p> <ul style="list-style-type: none"> • BenefitsCal: Text message channel added for confirmation link. this does not change the risk as the data elements used for verification have not changed. IVR: Meeting scheduled on June 7 to review Accenture team's analysis of IVR/AuthBot process against NIST 800-63A with Consortium Security and Privacy. <p>June 14, 2024:</p> <ul style="list-style-type: none"> • IVR: Determination from Consortium Security that the risk will need to stay open until a true identity verification solution can be incorporated into the authentication flow. The risk can continue to be low as improvements are being made to the authentication flow (i.e., removing SSN). 				

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ID	Title	Details	Status	Risk Level	Severity	Date Logged
		June 28, 2024: <ul style="list-style-type: none"> IVR: Risk to remain open until a true identity verification solution can be incorporated into the authentication flow 				
304	Unless production notification process is adapted to include BenefitsCal Training environment, end users may not receive timely notification of issues impacting the environment	Currently the BenefitsCal application in the training environment utilizes a non-production version of ForgeRock (ID-DEV) for authentication and authorization of customer and CBO users while the remaining applications and services present in the training environment utilize production services. This may impact the alignment of availability of BenefitsCal with the remainder of the CalSAWS training environment application and services along with training environment communications. <p>Status Updates:</p> May 3, 2024: <ul style="list-style-type: none"> New Risk May 17, 2024: <ul style="list-style-type: none"> Internal meeting to allow for communication items to be identified and developed. BenefitsCal will follow the CalSAWS communication channels leveraging existing distribution lists. Also allow for separation of technical constraints/support. June 14, 2024: <ul style="list-style-type: none"> The workgroup session scheduled on June 10, 2024, is cancelled since the draft policy letters from DHCS and CDSS are pending. May 31, 2024: <ul style="list-style-type: none"> Workgroup session conducted on 05/20/2024. Group continued reviewing the use cases and applicant and beneficiary scenarios requiring policy clarifications. Next meeting is scheduled for June 10, 2024 June 28, 2024: <ul style="list-style-type: none"> Tech-Ops will communicate to BenefitsCal technical teams when we there are issues with DEV ForgeRock 	Open	Low	Low	04/29/24

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Table 2.3-1 – Project Risks

Project Issues

ID	Title	Details	Status	Priority	Date Logged
300	Stability of the CalSAWS Enterprise Identity and Access Management Services	<p>The stability of ForgeRock CalSAWS Enterprise Identity and Access Management (IdM/IaM) solution is critical to the 58 Counties, CalSAWS, Hyland Imaging Solution, BenefitsCal Portal, and OCAT users. If ForgeRock is unavailable, it will impact user login access and authentication for Applications that use ForgeRock (e.g., CalSAWS, Hyland Imaging Solution, BenefitsCal Portal, OCAT, etc.)</p> <p>May 31, 2024:</p> <ul style="list-style-type: none"> Changes to session management outside ForgeRock caused request volume to increase over 10 times for token revokes which caused a brief service disruption on 5/30/2024. Failover to the DR region restored services. Changes to session-management were reverted over the weekend and ForgeRock restored to primary region. Release scheduled for 5/31/2024 was rescheduled to 6/7/2024. Design document for Evolution is 91% and undergoing final internal review. <p>June 5, 2024:</p> <ul style="list-style-type: none"> Risk realized into an Issue. Release scheduled for 6/7/2024 was rescheduled to 6/14/2024 with reduced feature set. Design document for Evolution is 95% and undergoing final internal review. Changes to session management outside ForgeRock caused request volume to increase. Failover to the DR region restored services. Changes to session-management were reverted over the weekend and ForgeRock restored to primary 	2 - Open	High	06/05/24 (Originally logged as Risk #300 on 12/06/23)

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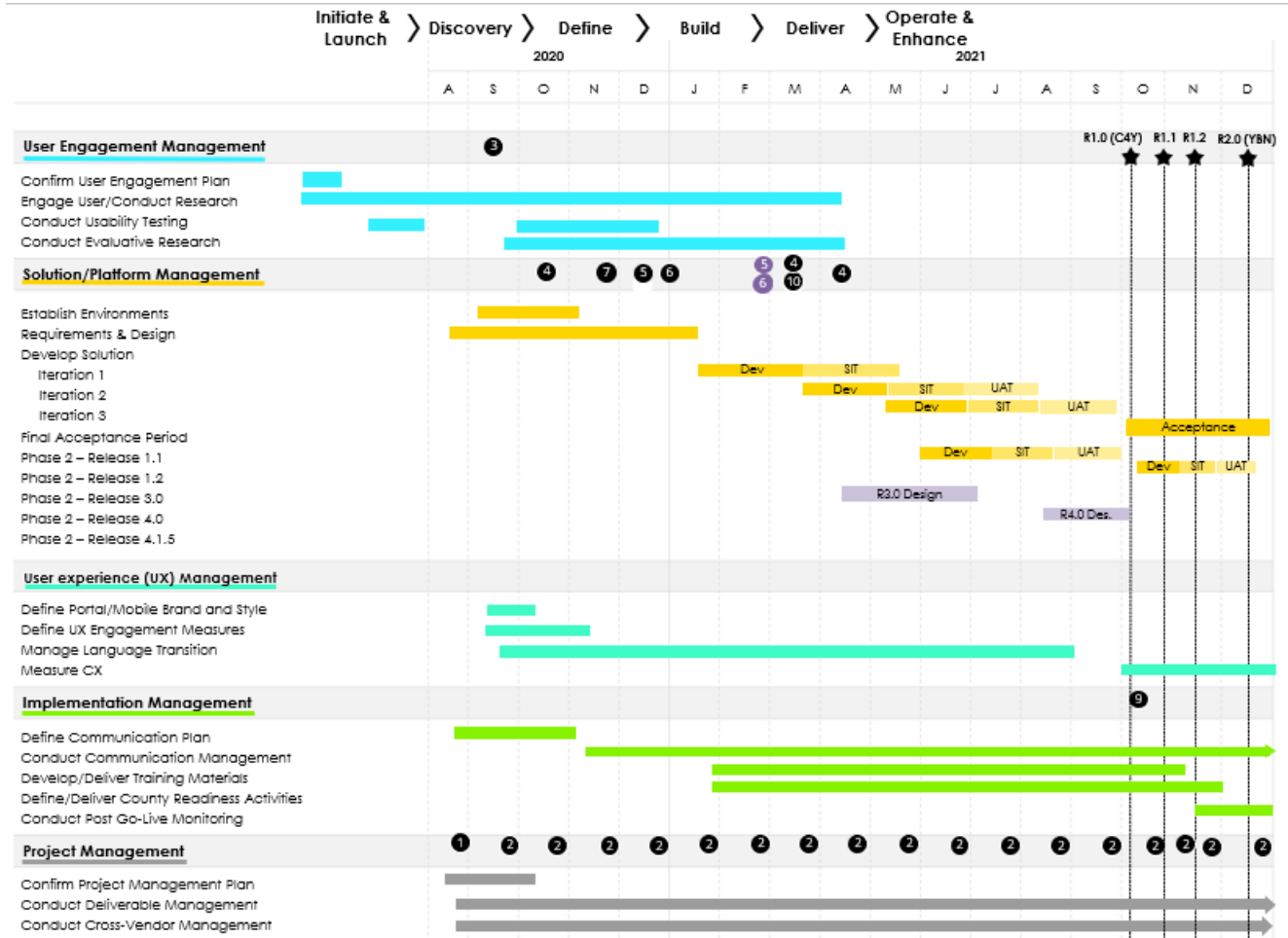
Period: July 29, 2024 to August 11, 2024

ID	Title	Details	Status	Priority	Date Logged
		<p>region Partnering with QA to implement deployment validation process that verifies configuration between east and west regions (risk status).</p> <p>June 28, 2024:</p> <ul style="list-style-type: none"> • Additional logging that was enabled on 6/14/2024 has enabled the vendor to further understand the characteristics of the incidents impacting production services. • A release is planned for 6/28/2024 that includes additional configuration items to further improve stability. <p>July 12, 2024:</p> <ul style="list-style-type: none"> • On July 12 and July 14, the team deployed to both primary and DR respectively; ForgeRock is running in the DR region. • This implements the changes from the June release as well as additional vendor recommendations on tuning in response to the May performance incidents. • The team is providing hypercare support after implementation of the vendor recommendations for the week of July 15, 2024. • Initial analysis shows that long response times have subsided after implementation; the team is continuing to monitor and continue tuning as needed. • The team will evaluate the efficacy of the changes and provide a plan to return to the primary region by July 26, 2024, to allow sufficient time for traffic and analysis 			

Table 2.3-2 – Project Issues

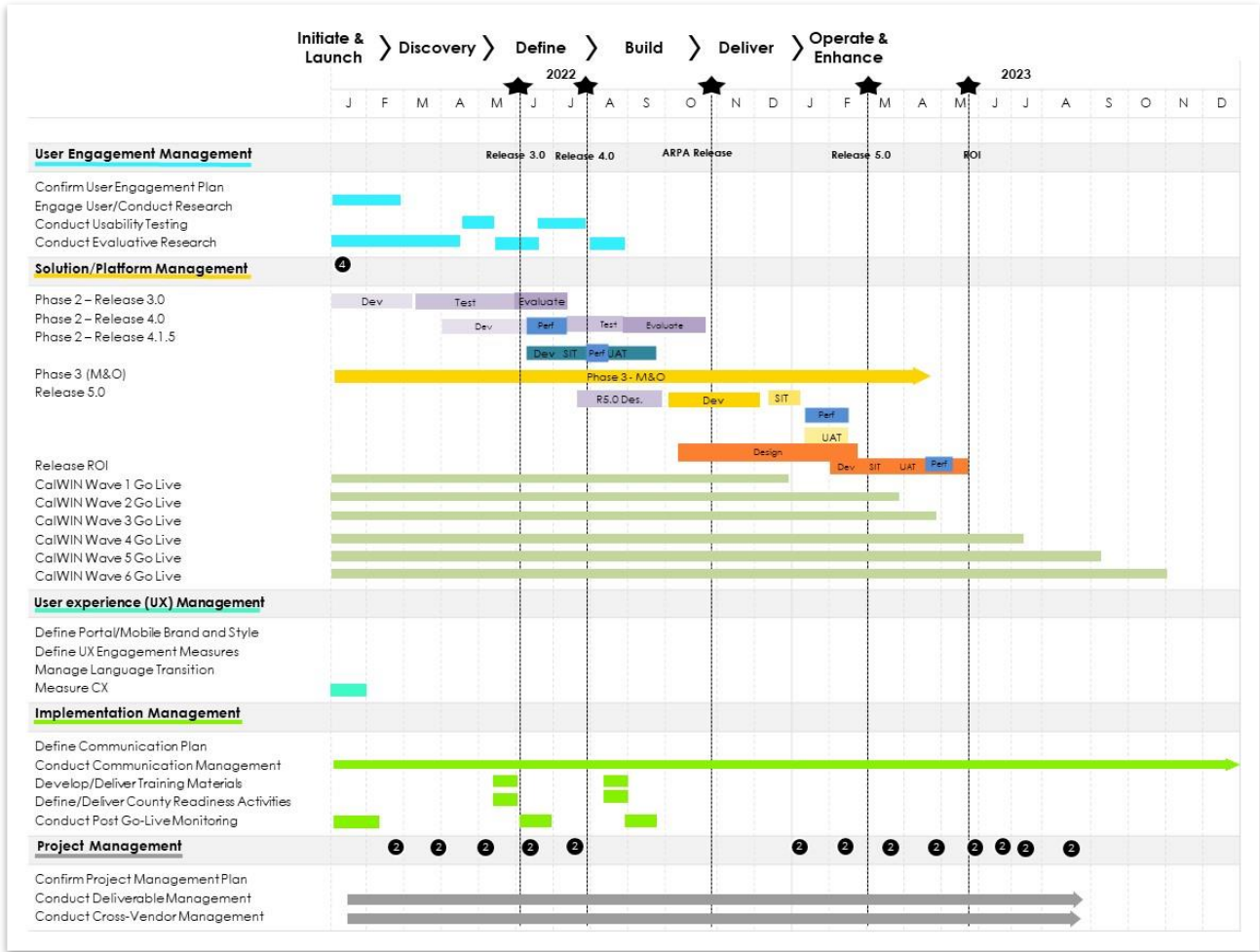
2.4 Project Work Plan Reports

Project Timeline



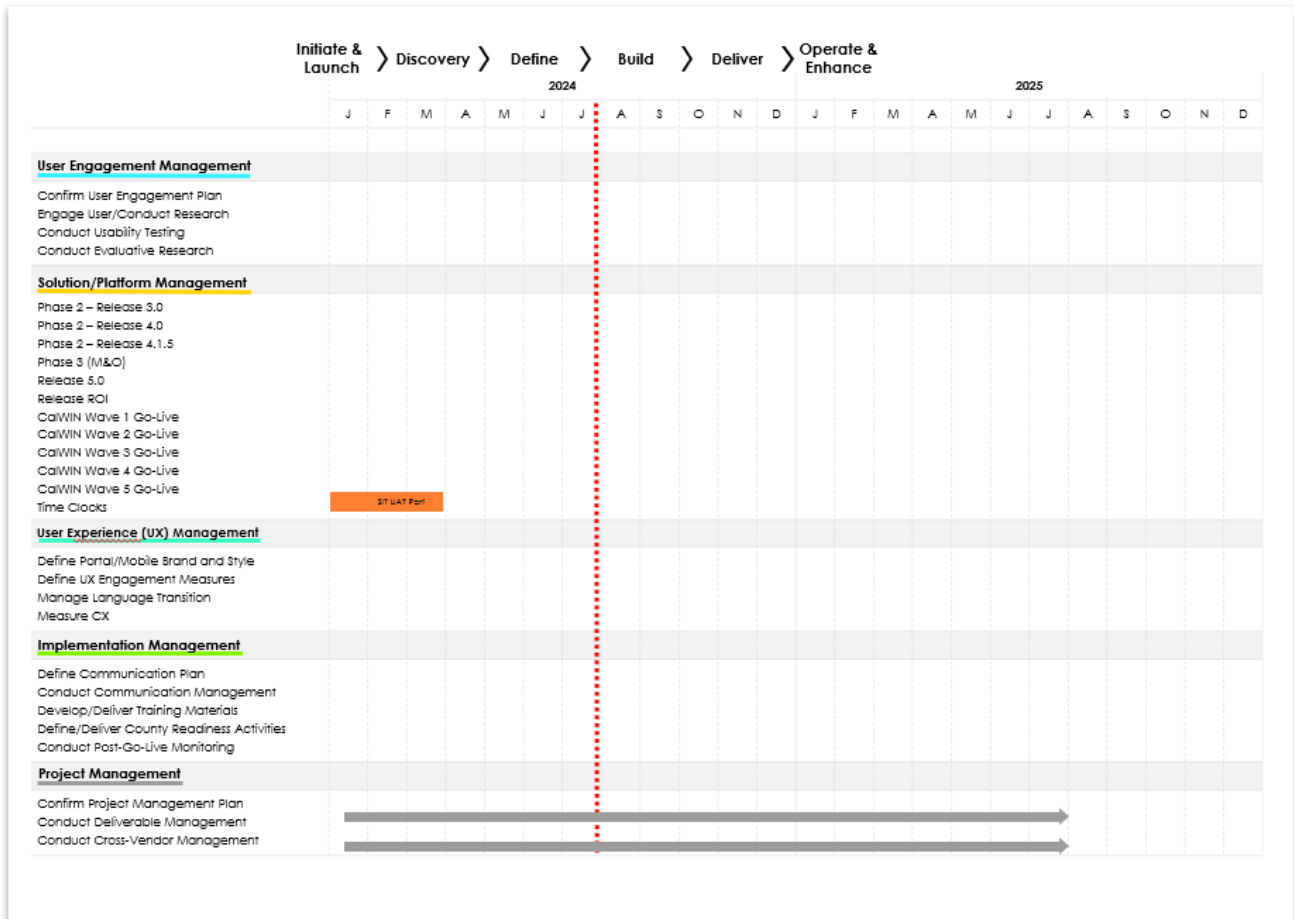
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Project Action Items – Overdue

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

ID	Description	Owner	Due Date
None.			

Table 2.4-1 – Overdue Action Items

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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	1
Reopened	0
In Review	0
Withdrawn	0
Total	4

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

Completed

- CSPM-74739: SCERFRA 24-524 – Alternate Formatted Forms

New / Assigned

- CSPM-74865: SCERFRA 24-525 – CalFresh Parity List Updates
- CSPM-74879: SCERFRA 24-526 – Online CalWORKs Appraisal Tool (OCAT) Replacement – Due: 08/08/24
- CSPM-74985: SCERFRA 24-529 – BenefitsCal Accepting Homeless Assistance Requests (CW 42)

2.6 Deviation from Plan/Adjustments

None for the reporting period.

3.0 BenefitsCal Collaboration Model (CM)

3.1 Highlights of the Reporting Period

- Prioritization In Progress for items prioritized in Quarter 3 and Quarter 4 of 2023, as well as Quarter 1 of 2024. (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-71544	Document Upload – List of Options	In Progress	To be concluded in August 2024; Research Started based on the Research Plan, focused group sessions done, and research share out ready for review.
Research Item	CSPM-71543	Document Upload – Multiple Docs	In Progress	To be concluded in August 2024; Research Started based on the Research Plan, focused group sessions done, and research share out ready for review.
Research Item	CSPM-71552	Orange Banner	Not Started	Prioritized for August 2024.
Enhancement	CSPM-67761	Update Application and RE/SAR 7 Status Tracker	Ready for Prioritization	Prioritized for September 2024.

Table 3.1-1 – Enhancements Updates, Prioritized by CM

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 planned activities for the next reporting period.

Issue Type	ID	Summary	Activity for Next Week	Target Delivery Date
Research Item	CSPM-71544	Document Upload – List of Options	Continue the research – including recruitments and focused group sessions.	08/31/24
Research Item	CSPM-71543	Document Upload – Multiple Docs	Continue the research – including recruitments and focused group sessions.	08/31/24
Research Item	CSPM-71552	Orange Banner	Continue the research item.	08/31/24
Enhancement	CSPM-67761	Update Application and RE/SAR 7 Status Tracker	Capture Consortium approval and work on Design updates.	09/26/24

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.

M&O Phases

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

4.1 Service Management

4.1.1 Overview

Incidents Created

- Eight (8) incidents were created in the biweekly reporting period for the BenefitsCal Tier 3 Team.

Incidents Resolved

- The BenefitsCal Tier 3 Team resolved two (2) incidents in the biweekly reporting period.

Incidents Closed

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

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Incidents Triaged

- The BenefitsCal Tier 3 Team has triaged seventy-five (75) incidents in the biweekly reporting period.

Problems Created

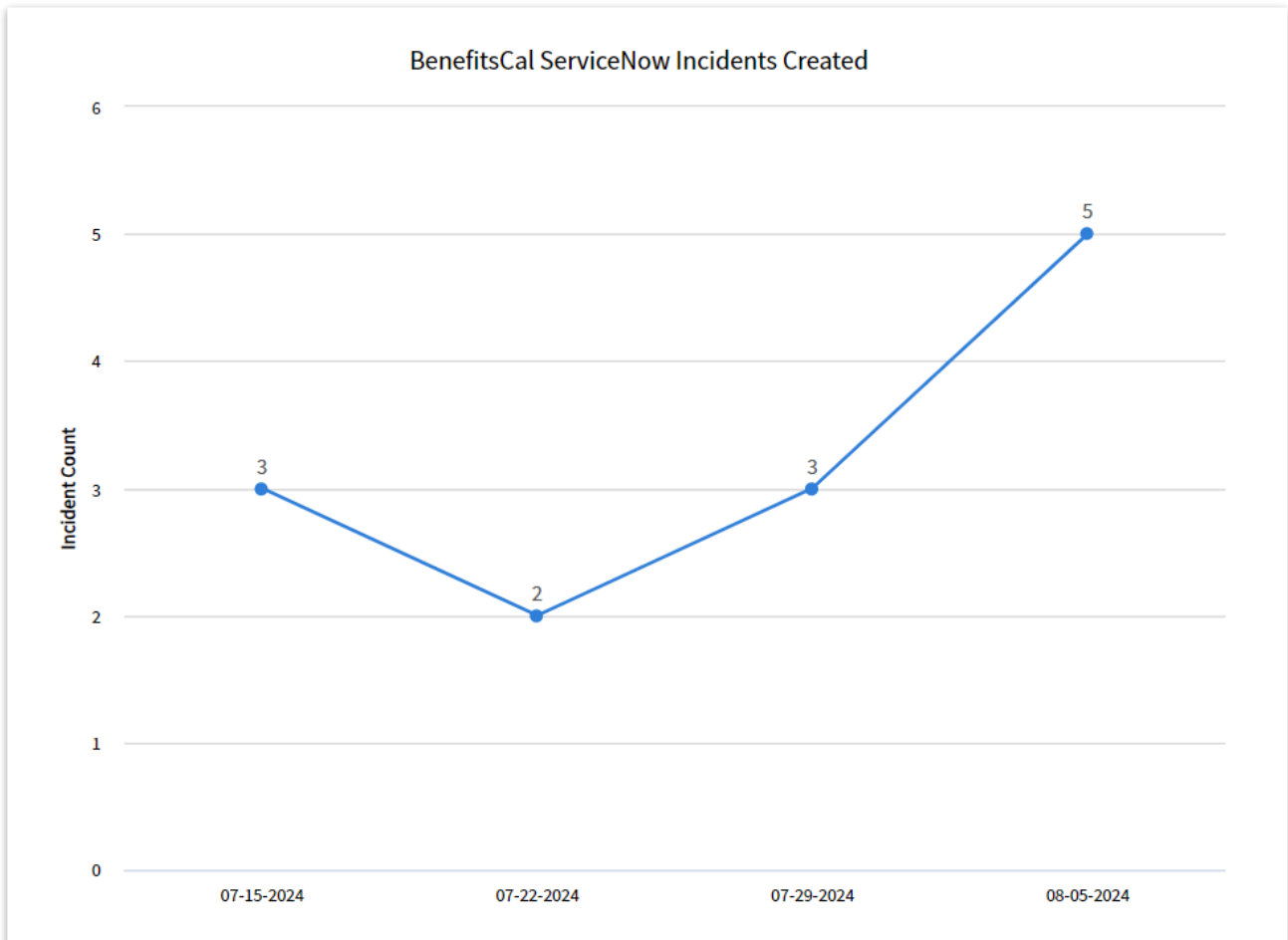
- The BenefitsCal Tier 3 Team created two (2) problem tickets in the biweekly reporting period.

Problems Resolved

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

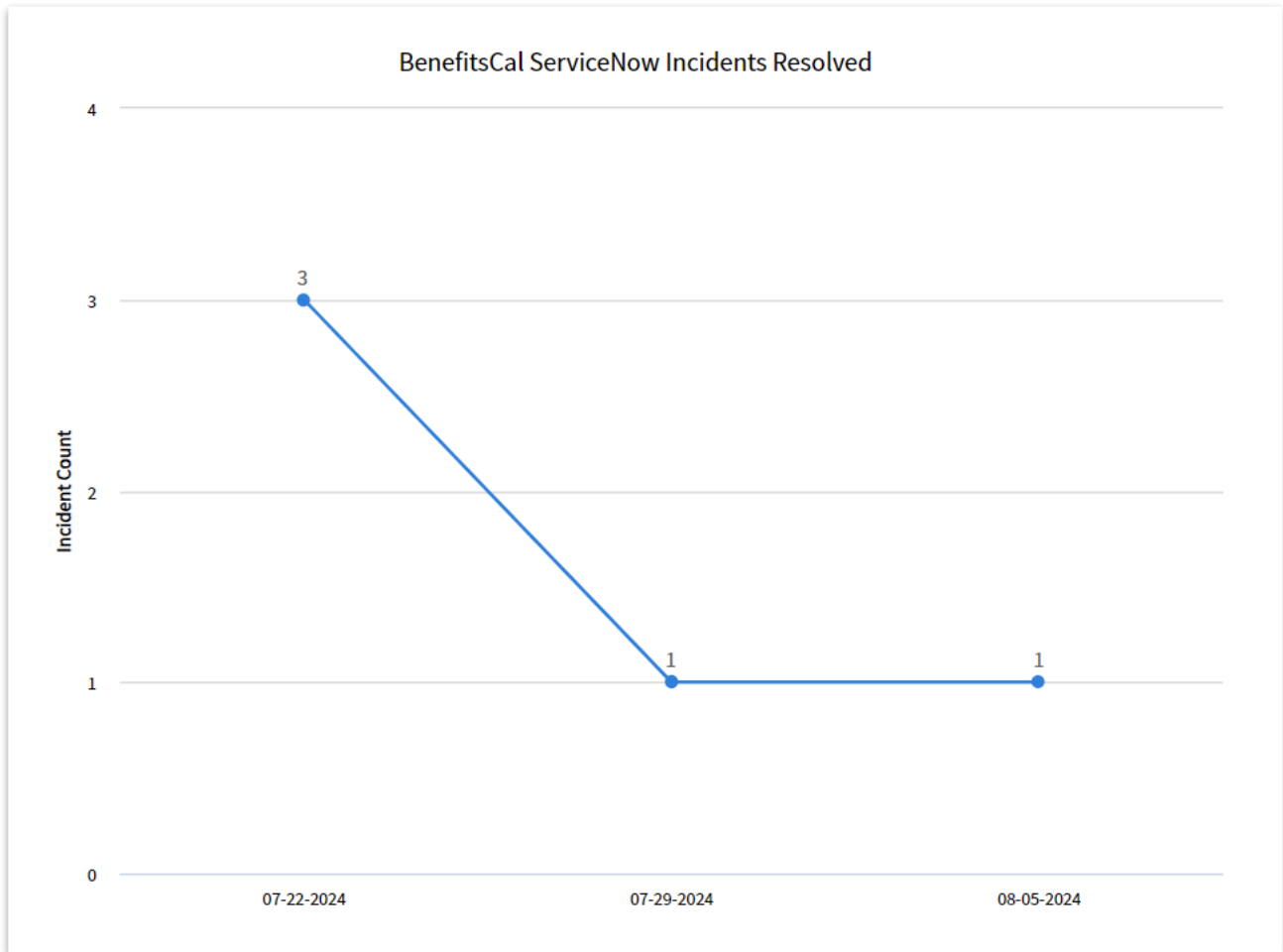
4.1.2 BenefitsCal Help Desk Metrics

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.



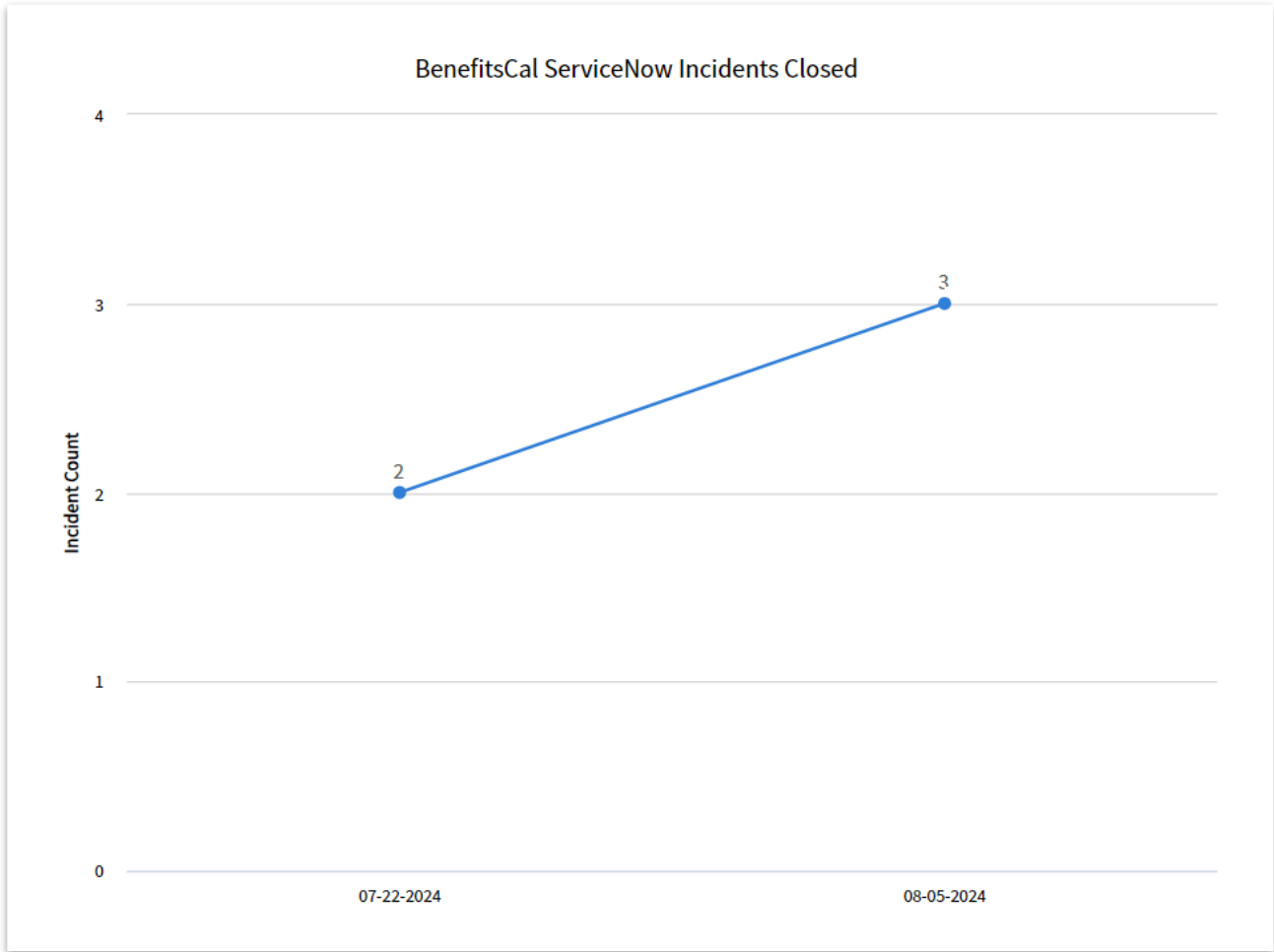
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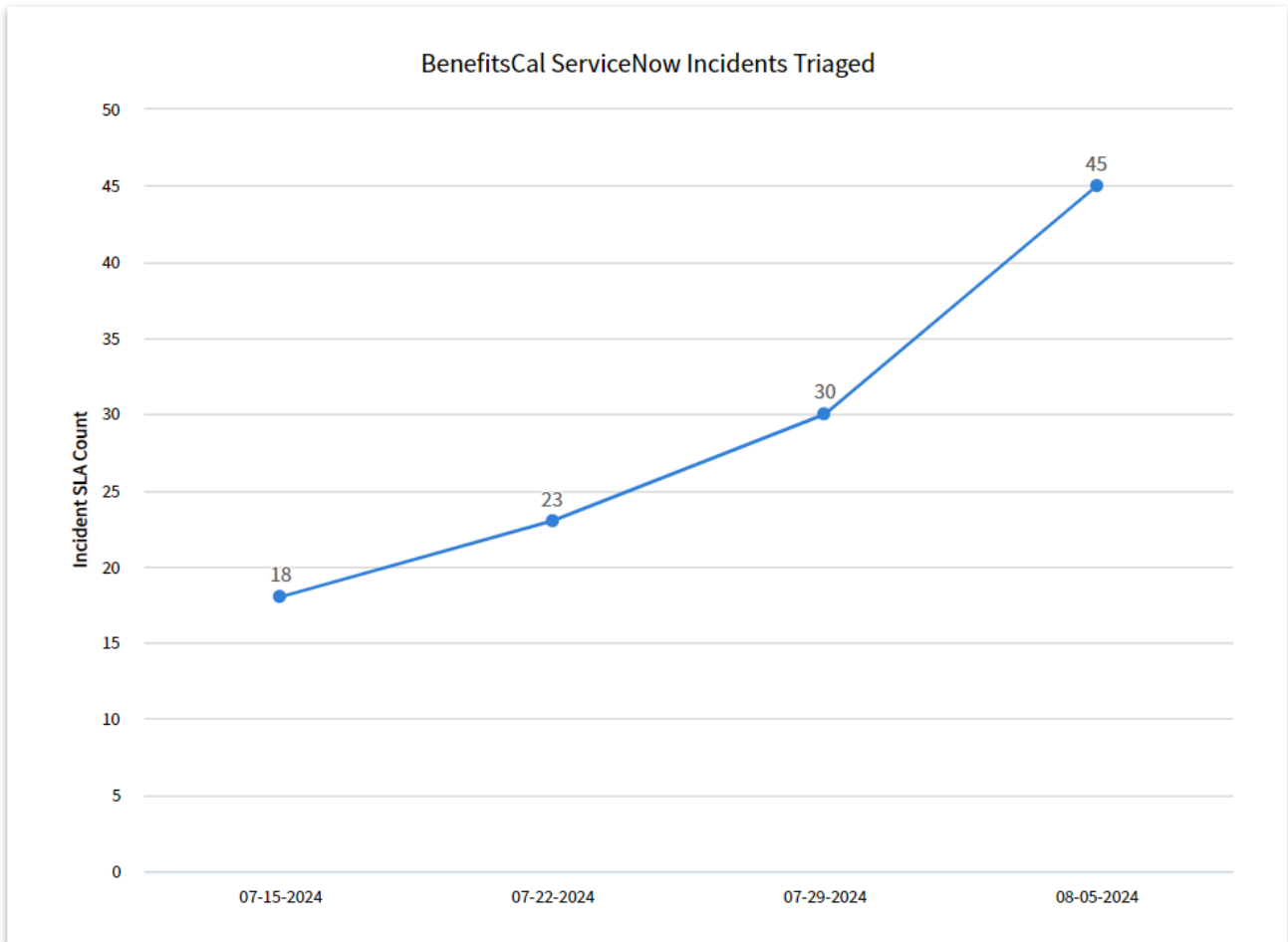
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Note: The graphs represent the ServiceNow incidents associated to all 58 Counties. Incidents represent the first level of ticketing that enters the ServiceNow system. The dates on the x-axis represent the start of week. The metrics does not include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

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

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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.



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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

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BenefitsCal ServiceNow Incidents by State and Age

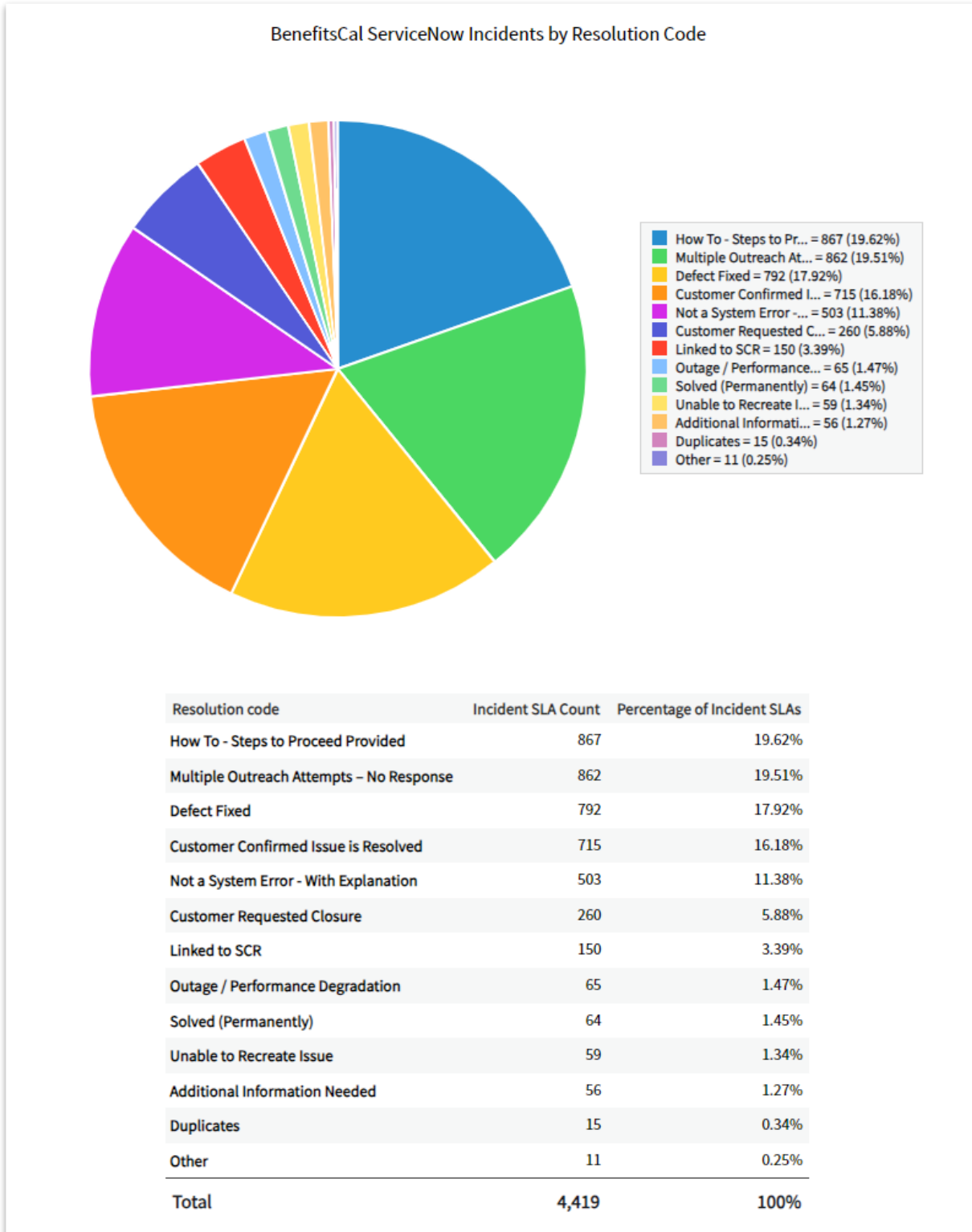
State	Aging Category	1-5 Days	6-10 Days	11-15 Days	16-30 Days	30-60 Days	60-180 Days	>180 Days	Count
	New		2	0	0	0	0	1	0
In Progress		1	0	0	0	0	0	0	1
On Hold		1	1	1	3	0	0	1	7
Resolved		0	1	0	0	0	1	0	2
Closed		0	0	73	341	163	121	2	700
Count		4	2	74	344	163	123	3	713

Aging "State" definitions:	
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

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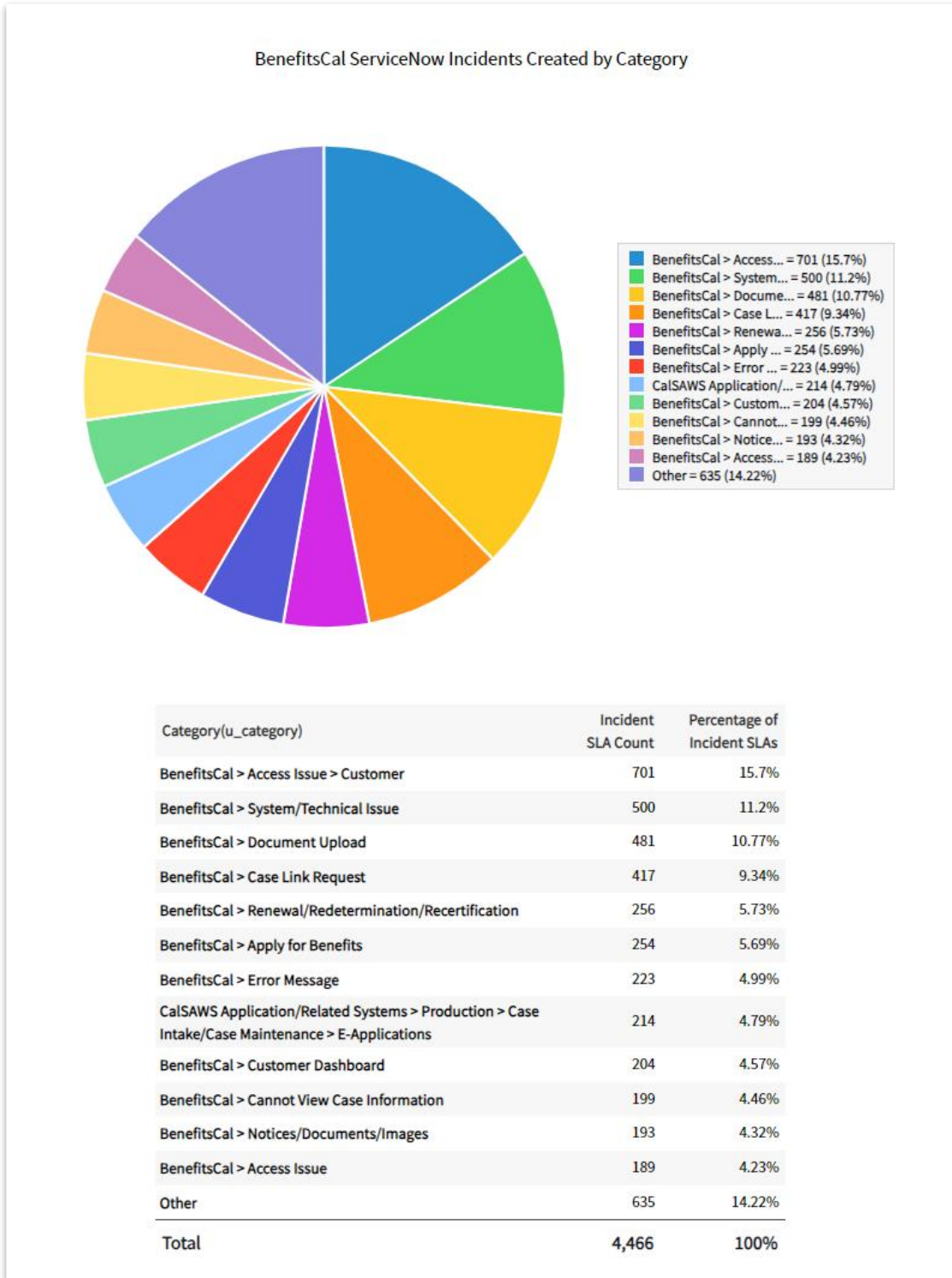


Note: The pie chart above represents Incidents resolved since BenefitsCal Go-Live on 09/27/21.

Figure 4.1-7 – BenefitsCal ServiceNow Incidents by Resolution Code

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

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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

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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
08/11/24	08/11/24 08:00 pm –9:30 pm PST	BenefitsCal Production Deployment – 24.08.11

Table 4.3-1 – BenefitsCal Outages

Scheduled Date	Outage Timeframe	Application Mode
08/29/24	8:00 pm – 9:30 pm PST	BenefitsCal Production Deployment – 24.08.29

Table 4.3-2 – BenefitsCal Upcoming Maintenance

Ticket ID	Description	Impact Date/Time	Impact	Status	Owner
PRB0049770	Modoc County users at the 120 North Main Street, Alturas site is unable to access CalSAWS and associated systems due to a power outage.	08/02/24 1:36 pm – 08/02/24 8:55 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
PRB0049774	Mono County users at the 107384 Highway 395, Coleville site are unable to access CalSAWS and associated systems due to a power outage.	08/02/24 4:53 pm – 08/02/24 6:44 pm PST	Mono County users at the Coleville site will not be able to access CalSAWS and associated systems until the issue is resolved.	Resolved	CalSAWS
PRB0049793	Sierra County users at the 22 Maiden Lane, Downie Ville site is unable to access CalSAWS and associated systems due to a power outage.	08/06/24 10:19 am – 08/06/24 2:51 pm PST	Sierra County users at the Downieville site will not be able to access CalSAWS and associated systems until the issue is resolved.	Resolved	CalSAWS

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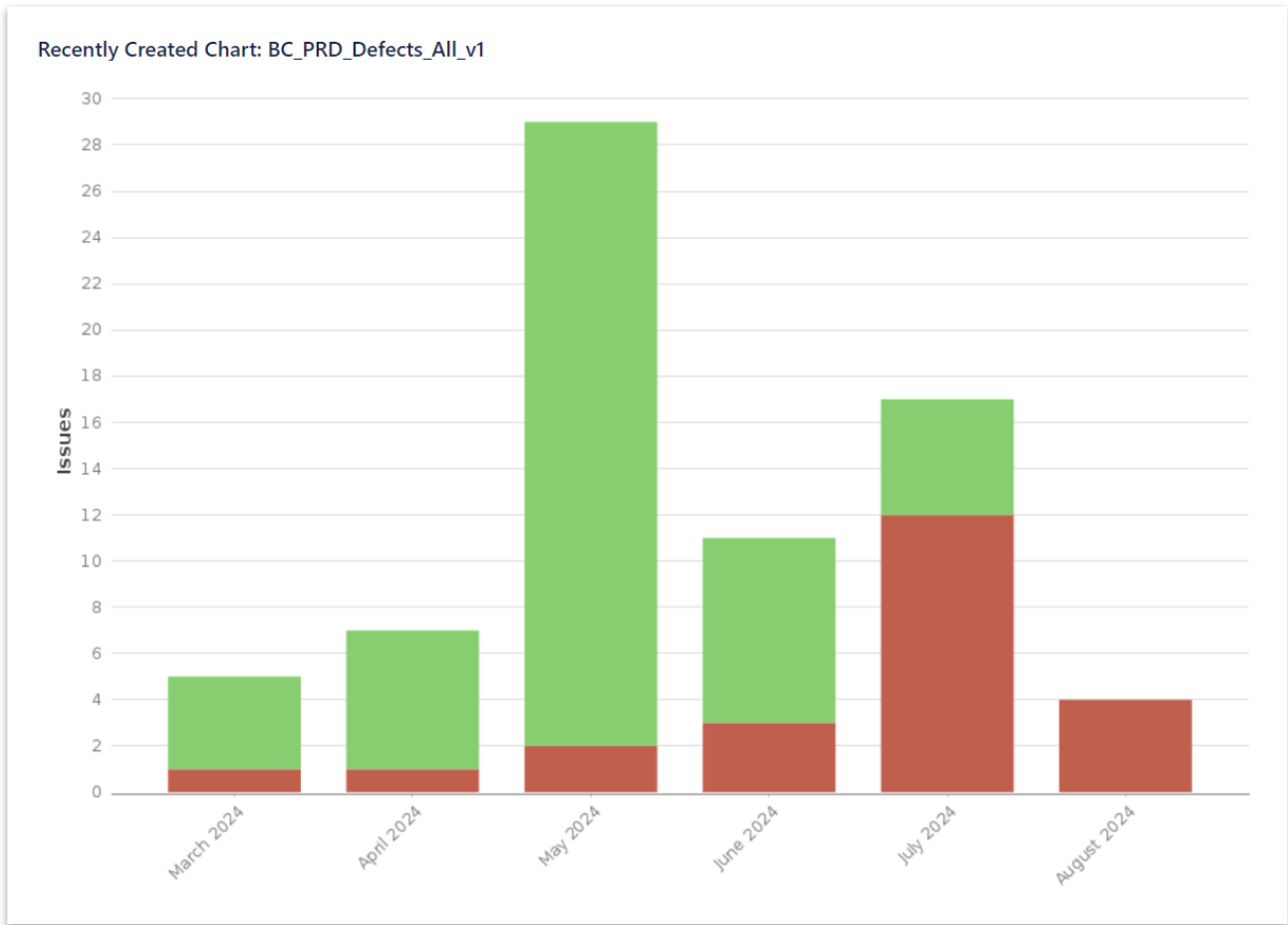
Period: July 29, 2024 to August 11, 2024

Ticket ID	Description	Impact Date/Time	Impact	Status	Owner
PRB0049803	Some users are experiencing slowness while navigating through and performing transactions in CalSAWS.	08/07/24 11:25 am – 08/07/24 12:55 pm PST	Some users may experience slowness while navigating through and performing transactions in CalSAWS until the issue is resolved.	Resolved	CalSAWS
PRB0049811	Some sites from San Bernardino, Riverside, Inyo, and Trinity Counties may experience slowness due to the Frontier (network provider) links being down.	08/08/24 7:00 am – 08/08/24 11:38 pm PST	Few sites may experience slowness navigating through and performing transactions in CalSAWS until the issue is resolved.	Resolved	CalSAWS
INC0152117	CalSAWS API /form/VOB is responding with 500 error code	08/07/24 10:00 pm – 08/07/24 11:00 pm PST	User will not be able to access API/site in the period	In Progress	CalSAWS
INC0151900	CalSAWS API /case-details and /notices are responding with 500 error code	08/06/24 7:00 pm – 08/06/24 8:30 pm PST	User will not be able to access API/site in the period	On Hold	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 (resolved Production defects – Green), month-over-month. Defects are closed upon system test validation and release deployment to Production.



■ Closed Production Defects ■ Open Production Defects

Figure 4.4-1 – Production Defects Backlog Monthly Trend

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4.4.1 Release Schedule Production Defect Fix

Severity	Release 24.08.29	Release 24.09.19	Release 24.09.26	Total
1-High	0	0	0	0
New	0	0	0	0
In Progress	0	0	0	0
Closed	0	0	0	0
2-Normal/Medium	1	0	1	2
New	0	0	0	0
In Progress	1	0	1	2
Closed	0	0	0	0
3-Normal/Low	6	1	12	19
New	0	0	0	0
In Progress	6	1	12	19
Closed	0	0	0	0
4-Cosmetic	0	0	0	0
New	0	0	0	0
In Progress	0	0	0	0
Closed	0	0	0	0
Total	7	1	13	21

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

- BenefitsCal Priority Release 24.08.11 was successfully deployed on 08/11/24 to BenefitsCal Production. One (1) production defect were planned for User Error Handling, Exception Handling, and Application Summary.

BenefitsCal Emergency

- None for the reporting period.

BenefitsCal Monthly Release

- None for the reporting period.

Release	Release Date	Summary
24.08.29 – Monthly	08/29/24	Seven (7) production defects and six (6) 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

- Continued design work for August 2024 enhancements.
- Continued working with the development and testing teams on the SSA (Social Security Administration) Application on BenefitsCal enhancement CSPM-74637.
- Hosted the BenefitsCal CWDA Check-In on 07/29/24 and 08/05/24.
- Attended ROI Workgroup on 07/29/24.
- Attended SCERFRA 24-908 discussion with State and Consortium on 07/29/24.
- Attended SAR 7 Prep-Pop Follow Discussion with State and Consortium on 07/29/24.
- Hosted the BenefitsCal CWDA Check-In on 07/30/24, 08/01/24, 08/06/24, and 08/08/24.
- Attended BenefitsCal Data metrics with State and Consortium on 07/30/24.
- Attended App Dev Meetings with CalSAWS and Consortium on 07/30/24 and 08/06/24.

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- Attended Formatted Forms Discussion on 07/30/24.
- Hosted ABAWD design Sessions with CDSS on 08/01/24.
- Cohosted SSA Expense discussion with CalSAWS on 08/05/24.
- Cohosted ABAWD timeline Discussion with CalSAWS on 08/05/24.
- Attended SCERFRA 24-908 discussion with State and Consortium on 08/05/24.
- Co Hosted the SSP Committee on 08/06/24.
- Attended SCERFRA 24-526 Discussion on 08/06/24.
- Hosted UCD/CX Check In on 08/06/24.
- Attended CBO Organization Data Discussion with CalSAWS and FR and Consortium on 08/07/24.
- Hosted ABAWD Design Session with Advocates on 08/07/24.
- Attended DHCS CalSAWS Touchpoint Meeting on 08/07/24.
- Co-hosted SSA BenefitsCal Flow - CF HH Expense Meeting with CDSS on 08/08/24.
- Hosted the BenefitsCal PM Stand-Up Meeting with the Consortium on 08/08/24.

Release 24.08.11 Development

- Completed Development for one (1) defect.
- Provided support to SIT and Independent Test teams for the Release 24.08.11 defect.

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

Release	Release Date	Summary
24.08.11	08/11/24	Finalized Design, continued Development, provided test support and deployed to Production.

Table 5.1-2 – BenefitsCal Enhancements Development Status

5.2.2 Activities for the Next Reporting Period – Requirements and Design

Designs and Design Meetings

- Continue design work for August 2024 enhancements.
- Begin design work for September 2024 enhancements.
- Continue working with the development and testing teams on the SSA (Social Security Administration) Application on BenefitsCal enhancement CSPM-74637.
- Host the BenefitsCal CWDA Check-In on 08/12/24 and 08/19/24.
- Host Premise Items Planning Call with CalSAWS on 08/12/24.
- Attend County Validation Calls for 24.09 on 08/12/24, 08/13/24, 08/14/24, 08/15/24, 08/16/24, 08/19/24, 08/20/24, 08/21/24, 08/22/24, and 08/23/24.
- Host the DDI and M&O Biweekly calls on 08/13/24, 08/15/24, 08/20/24, and 08/22/24.
- Attend App Dev Meetings with CalSAWS and Consortium on 08/13/24 and 08/20/24.
- Host BenefitsCal Pipeline Call on 08/13/24.

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- Host the BenefitsCal PM Stand-Up Meeting with the Consortium on 08/14/24 and 08/21/24.
- Attend Application Flow Discussion on RCA TCVAP on 08/19/24.
- Attend CAPI Workgroup on 08/20/24.
- Host the UCD Monthly Meeting with Advocates and State Partners on 08/21/24.
- Attend SAWS Policy Implementation Call on 08/21/24.
- Attend DHCS CalSAWS Touchpoint Meeting on 08/21/24.

5.2.3 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 Always on survey data for the month of July.

User Engagement

- Conducted CBO and county staff generative research sessions for document upload: List of options [CSPM-71544].
- Conducted CBO and county staff generative research sessions for document upload: Multiple Docs [CSPM-71543].
- Conducted usability testing for ABAWD ACL [CSPM-73600].

Enhancements

- Continued designs for ABAWD.
- Finalized designs for Restrict the number transaction reported on EBT2259 to 126 [CSPM-74427].
- Continued designs for Restrict BIC replacement requests [CSPM-64211].
- Continued designs for Login MFA Phase 3 [CSPM-71750].
- Conducted CBO County staff generative research sessions for document upload: List of options [CSPM-71544].
- Conducted CBO and county staff generative research sessions for document upload: Multiple Docs [CSPM-71543].
- Synthesized generative research findings for document upload: List of options [CSPM-74427].
- Synthesized generative research findings for document upload: Multiple Docs [CSPM-71543].

Advocate Engagement

- Responded to July UCD Monthly Meeting comment log.
- Prepared for and facilitated ABAWD design session with Advocates.

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5.2.4 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

- Conduct customer outreach for generative research sessions for Orange Banner [CSPM-71552].
- Conduct generative research sessions with customers for Orange Banner [CSPM-71552]

Enhancements

- Continue work on ABAWD designs.
- Continue designs for Update: Allow customers to remove their phone number [CSPM-71750].
- Continue designs for Restrict BIC replacement requests [CSPM-64211].

Advocate Engagement

- Continue prep for August UCD Monthly Meeting.
- Review comment log from ABAWD design session.

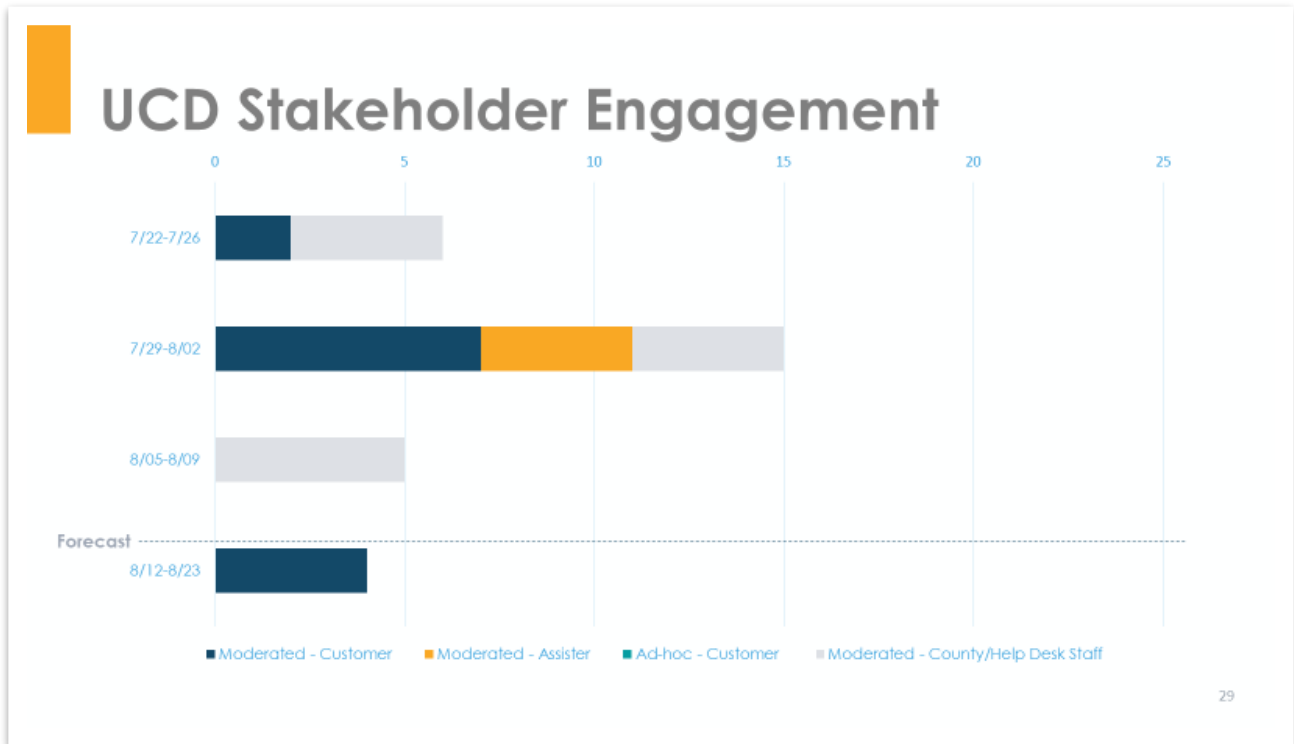


Figure 5.2-1 – UCD Stakeholder Engagement

5.3 Developments

5.3.1 Highlights of the Reporting Period – Development

Enhancements (M&E)

Release	Planned for Week Ending 08/09/24	Actual for Week Ending 08/09/24	Total Planned for the Release	Comments
Release 24.08.11	1	1	1	Release 24.07.25 was deployed to production on 08/11/24.
Release 24.08.29	4	4	6	Release 24.08.29 is planned for deployment on 08/29/24.

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 08/16/24	Total Planned for the Release	Total Completed for the Release	Comments
Release 24.08.11	1	1	1	Release 24.07.25 was deployed to production on 08/11/24.
Release 24.08.29	1	6	2	Release 24.08.29 is planned for deployment on 08/29/24.

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 September 2024.

5.4 System Test Execution

5.4.1 Highlights of the Reporting Period – System Test Execution

Release 24.08.11 – August Priority Release

- Validated the tickets tagged to the August Priority Release and deploy this in Production on 08/11/24.

5.4.2 Activities for the Next Reporting Period – System Test Execution

Release 24.08.29 – August Monthly Release

- Validated the tickets tagged to the August Monthly Release.

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 24.07.25 – July Monthly Release

- Deployed the July Monthly Release into Production on 07/25/24.

5.6.2 Automated Regression Test (ART) Coverage

The following are the automated regression scripts executed for regression in BenefitsCal for Release 24.07.25.

Release	# of Scenarios Executed	# of Scenarios Passed	# of Scenarios Failed	Overall Pass%	Pass of Executed	Coverage
24.07.25	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), TWM along with Appointments, Administrative, ROI and SSA 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 24.08.29 – August Monthly Release

- The BenefitsCal team has identified the scope of August monthly release as two (2) enhancements, “Technical – Minimize the data available to the customer in the browser” and “Runtime Upgrade of python lambdas from 3.8.” No new script development is anticipated; however, four (4) existing scripts need to be updated/re-scripted to incorporate this release changes. The performance tests are planned with mock services.

Cycle	Start Date	End Date	Scope	Test Cases Status	Execution Status
13	07/22/24	08/23/24	Release 24.08.29 – August Monthly Release	<p>Scope: The BenefitsCal August 2024 monthly release has two (2) security and technology upgrade enhancements and Performance testing is planned for the entire suite including all the scripts.</p> <p>Executions: BenefitsCal isolated Load tests with mock services:</p> <ul style="list-style-type: none"> • Monday, August 19 • Tuesday, August 20 	50%

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

[REDACTED]

[REDACTED]

DAST

- Executed the biweekly 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 08/09/24.

[REDACTED]

[REDACTED]

7.2.2 Activities for the Next Reporting Period – Security

[REDACTED]

[REDACTED]

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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

- BenefitsCal Release notes for Priority Release 24.08.11 were distributed on 08/09/24.

8.2 Activities for the Next Reporting Period

- BenefitsCal Release notes for monthly release 24.08.29.