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

Reporting Period: August12, 2024 to August 25, 2024

08/26/24

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1.0   Executive Summary

1.1   Executive Summary Agenda Topics

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC
4.2	Upcoming BenefitsCal Monthly Release **24.08.29** on **08/29/24**

August Enhancements (Release 24.08.29)	➢ **Six (6) enhancements will be delivered to Production in August 2024 Monthly Release:**
	     o **One (1) Policy Enhancement:**
	        ▪ CSPM-69828: Update link for Register to Vote on the Home page and Help page.
	     o **One (1) Collaboration Model Enhancement:**
	        ▪ CSPM-68266: Link to YouTube Videos on the dashboard and banner.
	     o **Two (2) Partner Support Enhancements:**
	        ▪ CSPM-69825: Update Student Info Mapping in App Transfer.
	        ▪ CSPM-74427: Restrict the number transactions reported on EBT 2259 to 126.
	     o **Two (2) Technical Enhancements:**
	        ▪ CSPM-71737: Technical improvement to limit the data available in a browser session.
	        ▪ CSPM-74664: Runtime upgrade of python lambdas from 3.8.

GCF (GetCalFresh) Parity Items	➢ **Premise approved and planning continued for the below Parity items:**
	 ➢ **#22, 44: Immigrant specific help and FAQs**
	     o CDSS (California Department of Social Services) CF (CalFresh) provided written confirmation on 06/12/24 stating that BenefitsCal recommendations will meet the gap, also provided the links to be added for Immigrants in the Help Center.
	 ➢ **#24: Update CalFresh Application Flow to reduce questions.**
	     o CDSS CF provided written confirmation on 08/08/24 stating they agree with the BenefitsCal recommendations.
	 ➢ **#30, 32: Release of Information (ROI)**
	     o Contingent on the ROI workgroup outcomes.
	 ➢ **#34: CDSS CF Prime Contractor Reports**
	     o CDSS CF provided written confirmation on 06/12/24 stating that the BenefitsCal recommendations will meet the gap.
	 ➢ **#46, 51: Automated reminder emails and text messages for customers**
	     o BenefitsCal provided the baseline used for providing the SCERFRA response and the recommendations to CDSS.
	     o CDSS confirmed the recommendations would meet the gap in the GCF Parity meeting held on 07/10/24.

STATUS REPORT SUBSECTION	STATUS AGENDA TOPIC

	➢ **#52: Update utilities options for CalFresh applicants in BenefitsCal**
	  o Assumptions confirmed by CDSS CF on 10/03/23.
	➢ **#55: Suggest SAR 7 documents to be uploaded by the customers in BenefitsCal.**
	  o Assumptions confirmed by CDSS CF on 10/03/23.

User Centered Design (UCD) Activities	➢ **Customer Experience (CX) Measurements Data**
	  o Monitored the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues.
	➢ **User Engagement**
	  o Conducted county staff generative research sessions for Orange Banner [CSPM-71552].
	  o Recruited customers for Orange Banner [CSPM-71552].
	  o Conducted generative research sessions for Orange Banner [CSPM-71552].
	➢ **Enhancements**
	  o Continued designs for ABAWD (Able-Bodied Adults Without Dependents).
	  o Finalized designs for Update styling of selected answers in Chatbot [CSPM-74599].
	  o Finalized designs for Allow customers to remove their phone number [CSPM-71750]
	  o Conducted generative research sessions with County workers and Customers for Orange Banner [CSPM-71552].
	➢ **Advocate Engagement**
	  o Prepared for and facilitated the August UCD monthly meeting with Advocates.
	  o Sent the August UCD monthly meeting comment log to the Advocates.

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2   BenefitsCal Project Status Dashboard

Topic	Status	Highlights
Availability	🟢	The BenefitsCal System did not experience any unplanned outages.
Defects	🟢	There are twenty-seven (27) active Production defects.
Incidents	🟢	There are nine (9) open Tier 3 incidents.

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

Table 1.2-1 – Status Dashboard

1.3   Highlights from the Reporting Period

➢ **Priority Release** – None for the reporting period.
➢ **Emergency Release** – None for the reporting period.
➢ **Monthly Release** – None for the reporting period.

Planned Outages

➢ None for the reporting period.

2.0   Project Management

2.1   Deliverables/Work Products

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/Work Products Summary

Del #	Name	Team	Status [1]	Status
WP 24.25	CX Bimonthly Report (June/July 2024)	UCD	🟢	DWP submitted 08/12/24 FWP submitted 08/22/24 FWP approval 09/02/24
WP 25.29	Monthly M&O Report – July 2024	M&O	🟢	DWP submitted 08/09/24 FWP submitted 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 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.

2.1.3   Activities for the Next Reporting Period

Deliverable and Work Product submissions for next reporting period:

- ➢ None for the reporting period.

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
0125-24	PPOCs (All); Regional Managers (All)	CalSAWS M&E	BenefitsCal Public-Facing Changes: CalSAWS Enhancement Request (CER) vs Collaboration Model Enhancement Request (ER)	08/12/24	Marsale Eramya	Carrie White
0132-24	PPOCs (All); Regional Managers (All); Self-Service Portal Committee (All)	CalSAWS M&E	Automation of e-Application Status, Updates and Reminders	08/22/24	Dymas Pena	Cathy Vaisau
0133-24	PPOCs (All); Regional Managers (All); Foster Care Committee (All)	CalSAWS M&E	SCR CA-277036 ACL 24-04 Dual Agency Rate Eligibility for Dual Agency Children & NMD's in Foster Family Agency Resource Homes (Alternate Process)	08/22/24	Ignacio Lazaro	Laura Ould

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 BenefitsCal in 2022 is at risk until features are added to BenefitsCal. **Status Updates:** September 2, 2022: - Had multiple meetings with CDSS to discuss the GetCalFresh Gap List with Consortium and CWDA, latest on 08/29/22. There is a biweekly meeting cadence. Currently there are few enhancement suggestions from CDSS on partial gaps. Teams are going to continue having working sessions to decide any of these must have or nice to have. September 30, 2022: - Continued working sessions with CDSS, CWDA, Consortium and CalSAWS. With the CDSS's analysis, there is total of 41 gaps. 32 are logged as enhancements for prioritization and the remaining 9 will be discussed at upcoming working sessions. There is also a plan to identify/classify must have vs nice to have items. Next working session is scheduled for 10/05/22. January 6, 2023: - BenefitsCal team has started working on the effort estimations for the gaps list (31 gaps/52 enhancements). Targeting to complete the estimations by 01/16 and propose prioritization. CDSS, CWDA and Consortium	Open	Low	Medium	05/10/21

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		will provide direction on the implementation schedule. January 11, 2023: • Prioritization is requested by end of month so it can be incorporated into the roadmap. February 2, 2023: • Provided responses to CDSS SCERFRA with estimates for GCF parity list items. CDSS to confirm the SCERFRA approval and prioritization to establish a roadmap for implementation. February 3, 2023: • Attended meeting with CDSS, CalSAWS, and CWDA for the GCF Parity List on 02/02/23. Provided responses to CDSS SCERFRA with estimates for GCF parity list items. March 3, 2023: • RMG: Attended meeting with CDSS, CalSAWS, and CWDA for the GCF Parity List on 03/01/23. CDSS to confirm the SCERFRA approval and prioritization to establish a roadmap for implementation. April 7, 2023 • Attended meetings with CDSS, CalSAWS, and CWDA for the GCF Parity List on 03/22/23 and 04/05/23. CDSS shared decommissioning timeline got GCF components/CDSS will map the components planned for decommissioning to parity list items to confirm the SCERFRA approval, funding source and prioritization to establish a roadmap for implementation. April 28, 2023: • Attended meetings with CDSS, CalSAWS, and CWDA for the GCF Parity List on 03/22/23 and 04/19/23. CDSS is currently mapping the components planned for decommissioning to parity list items and will confirm the SCERFRA approval for SCERFRA 23-512, CDSS is also confirming the funding source to				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		establish a roadmap for implementation. Next meeting is scheduled on 05/03/23. June 2, 2023: • Participated in the biweekly meetings on 05/03/23 and 05/17/23. Worked with the California Welfare Directors Association (CWDA) and the Consortium and provided line-item level analysis for a Legislative request on 05/19/23. Next biweekly meeting is scheduled for 06/07/23. The California Department of Social Services (CDSS) continued mapping the components planned for decommissioning to the parity list items. June 9, 2023: • BenefitsCal and CalSAWS teams connected with ODI on Friday 06/09/23. Next steps identified for ODI to provide the raw data from GCF to begin the analysis. June 30, 2023: • Biweekly meeting conducted with CDSS, CWDA, Consortium and CalSAWS on 06/21/23. CDSS to provide final list of excel extract of items based on legislative response. Also, teams continued to work with ODI team on the analysis and data needs/questions. July 28, 2023: • A working session is scheduled for 08/02/23 to talk about SCERFRA 23-500, SCERFRA 23-512 (SSA flow) and CF 303 – Benefit Replacement with CDSS, CWDA, Consortium and CalSAWS. September 1, 2023: • Multiple working sessions have been facilitated by CDSS with participation by CWDA, Consortium, BenefitsCal, and CalSAWS. Since August 02, 2023, out of 26 items, 4 items have been closed, 4 items are in-plan. 9 items are awaiting confirmation/ response by CDSS				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		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. September 8, 2023: • Working session facilitated by CDSS with participation by CWDA, Consortium, BenefitsCal and CalSAWS on 09/06/23. CDSS is going to provide offline response for the remaining items. Next working session is schedule on 10/04/23. Also working with ODI on recommender widget analysis. Next meeting is on 09/12/23. September 29, 2023: • Continue to participate in working sessions facilitated by CDSS with participation from CWDA, Consortium, BenefitsCal and CalSAWS. Project has provided revised estimate for 5 parity items on 9/22 via SCERFRA 23-500 that includes SSA Flow, CF-303 and three other changes. Next meeting with CDSS is scheduled for 10/4/23 where 9 remaining items will be discussed. October 6, 2023: • Participated in sessions facilitated by CDSS on 09/19/23, with participation from CWDA, Consortium and BenefitsCal for parity list. BenefitsCal responses for parity list SCERFRA 23-500 for tracking IDs 9, 19, 20, 31, 63 are provided to CDSS on 09/22. Another working session is facilitated on 10/04/23 with participation from CWDA, Consortium, BenefitsCal and CalSAWS. 1 item is resolved, and 8 items are remaining where CDSS and CFA to provide confirmation to finalize. November 3, 2023:				

ID	Title	Details	Status	Risk Level	Severity	Date Logged

		• 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.
		
		November 10, 2023:
		• Work order #14 is submitted on 10/23/23 including the following items:
		  o GCF Parity#20: CalFresh Application "Joint Processing" by Social Security Administration and County Welfare Departments in BenefitsCal – Development and Implementation
		  o GCF Parity#31: CF303
		  o GCF Parity#9: Vaccination
		  o GCF Parity#19: Self Employment Help Text
		  o GCF Parity#63 Language Specific URLs
		
		December 1, 2023:
		• Work order 14 is presented during JPA board meeting in November 2023.
		• BenefitsCal and CalSAWS teams provided the revised version of the estimates for the SCERFRA 23-500 including the 5 parity items (#s 22, 38, 44, 52, 55) on 11/17/23.
		• CDSS is currently reviewing the estimates.
		• Next working sessions is scheduled on 12/06/23.
		• 4 items are pending clarification from CDSS & CFA before proceeding forward.
		
		December 15, 2023:				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		• 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. December 29, 2023: • Next working session is scheduled for 01/03/24. Work is in progress for the items documented in Work Order #14. January 12, 2024: • 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. February 9, 2024: • Items #9, #19, and #63 implemented and deployed to production with January 24.01 release. • Working sessions were conducted on 02/07/23. 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. March 8, 2024: • A working session was conducted on 03/06/24 with the CDSS, Consortium, and CWDA on Premise funding for implementation timeline.				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		• 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. April 5, 2024: • 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). April 17, 2024: • 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				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		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. May 3, 2024: - A working session was conducted on 05/01/24 with CDSS, Consortium on open items Item #20 (SSA Assisted Apps) is on schedule to be delivered with the May 24.05 baseline release. - CDSS confirmed funding will be provided for items #22, #34, #44, #52. - For #55, CDSS will confirm whether the Pre-populated SAR 7 funds can be utilized or not. - Discussions will continue for the closure of remaining (3) parity items #24, #46, and #51. May 17, 2024: - 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 May 31, 2024: - Next meeting is scheduled on 6/5/2024 with CDSS, Consortium, CWDA and CalSAWS on the open items. June 14, 2024: - Working session is conducted with CDSS, CWDA and Consortium on 6/5/2024.				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		• 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. June 28, 2024: • Funding and Prioritization meeting facilitated by CDSS on 6/28/24. Next working session is scheduled on 07/03/2024. July 12, 2024: • 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. August 9, 2024: • Received confirmation from CDSS for 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				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers	Recently issued Release of Information (ROI) policy is not detailed enough, nor is it consistent between the two state Departments (CDSS and DHCS). The policy as written may create customer information privacy/security, safeguard and county operations concerns, and liabilities. As the policy was released after the completion of ROI design, development, and testing of the functionality in BenefitsCal and CalSAWS, counties have not had sufficient time to assess the ROI functionality with the high-level policy and to be able to determine impacts to their county operations and the associated alignment with the existing BenefitsCal/CalSAWS design. The policy as written does not give clear direction on County responsibilities associated with the establishment of CBO agreements, provisions of those agreements and monitoring of CBO compliance with the agreements. Counties also have not had sufficient time to be able to determine if their current CBO agreement language is adequate and includes provisions and protections to further protect customer information when being accessed by CBOs via BenefitsCal. BenefitsCal/ CalSAWS initial design and implementation has been postponed until final/revised policy is issued by both CDSS and DHCS and there is operational clarity agreed to by all parties. **Status Updates:** June 16, 2023: • Responded to SIRFRA 1270/1271 regarding Expanding the Release of Information Feature with set of questions to DHCS from BenefitsCal, CalSAWS, and CWDA on 06/12/23. June 30, 2023: • Risk was reduced to probability of 30% which brings it to an overall medium level. State partners to confirm the topics and agenda items for the workgroup discussions. Topic was also covered during the	Open	Medium	High	05/19/23

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		June JPA Board meeting on 06/29/23. July 28, 2023: • 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. September 1, 2023: • 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. September 22, 2023: • 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.) November 3, 2023: • Applicant/recipient roles/responsibilities matrix (e.g., Authorized Representatives, Power of Attorney, CBOs, etc.) is currently jointly being developed. It will address Medi-Cal, CalFresh and CalWORKs programs. Next workgroup meeting is scheduled on 11/13/23. December 1, 2023: • Workgroup sessions #6 conducted on 11/13/23. Group continued working on roles and responsibilities matrix as well as the liability and contract				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		spectrum of the Next workgroup meeting is scheduled on 12/04/23. December 15, 2023: • Workgroup session #7 and #8 conducted on 12/04/23 and 12/11/23. Discussions continued around additional chart for responsibilities to be developed to cover scenarios when contracts are in place or not. • Next workgroup meeting is scheduled on 01/08/24. December 29, 2023: • Next workgroup meeting is scheduled on 01/08/24. Stakeholders received updates regarding the workgroup progress during the Quarterly Stakeholder meeting held on 12/20/23. February 9, 2024: • Most recent working session held on 02/05/24. Team provided a demonstration of the ROI functionality in BenefitsCal and CalSAWS (based on the original design). Working with the Stakeholders on applicant/recipient roles/responsibilities;(e.g., Authorized Representatives, Power of Attorney, CBOs, etc.); matrix, which addresses Medi-Cal, CalFresh and CalWORKs programs completed, will be included in future Errata or state letter by both DHCS and CDSS. Additional chart for responsibilities in progress to cover scenarios when contracts in place or not. This chart is to be included in future letter. • Next meeting dates scheduled: 03/04/24, 03/18/24, and 04/08/24. March 8, 2024: • Workgroup session conducted on 03/04/24 with the Stakeholders.				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		• 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. April 5, 2024: • 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. April 17, 2024: • Workgroup session conducted on 04/08/24. • Focus of the meeting was to begin reviewing the use cases and the data points to identify any other policy clarifications or guidance that may be needed to help support counties and public. • Counties worked with CWDA to capture outstanding concerns, and these have been shared with DHCS and CDSS. • Next meeting is scheduled for 04/29/24. May 3, 2024: • 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				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		processes (for Counties and CBO/Assistors). • Next meeting is scheduled for 05/13/24. May 17, 2024: • 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. May 31, 2024: • 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 14, 2024: • The workgroup session scheduled on June 10, 2024, is cancelled since the draft policy letters from DHCS and CDSS are pending. June 28, 2024: • Updated trigger date to July 31, 2024, to re-evaluate the risk once the draft policy letters from DHCS and CDSS are published. July 12, 2024: • 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. August 9, 2024: • Next workgroup session is on 8/26/2024. • CDSS and DHCS will share the final policy after reviewing the inputs from the stakeholders.				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		• CalSAWS and BenefitsCal will conduct an impact assessment based on the final policy				
303	Unauthorized BenefitsCal Users could access CalSAWS data without Digital Identity Verification when case linking functionality is enabled	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. **Status Updates:** April 5, 2024: • New risk introduced. April 18, 2024: • 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. May 3, 2024: • Discussion between Accenture Security and IVR teams held to review the components and flow of the IVR user verification process. • Analysis of how IVR meets or does not meet the guidelines from NIST 800-63. • Identity Verification guidelines pending additional analysis, etc. 05/17/24. May 17, 2024:	Open	Low	Low	03/18/24

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		• 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. May 31, 2024: • 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. June 14, 2024: • 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). June 28, 2024: • IVR: Risk to remain open until a true identity verification solution can be incorporated into the authentication flow				
304	Unless production notification process is	Currently the BenefitsCal application in the training environment utilizes a non-production version of ForgeRock (ID-DEV) for authentication and	Open	Low	Low	04/29/24

ID	Title	Details	Status	Risk Level	Severity	Date Logged
	adapted to include BenefitsCal Training environment, end users may not receive timely notification of issues impacting the environment	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. **Status Updates:** May 3, 2024: • New Risk May 17, 2024: • 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: • The workgroup session scheduled on June 10, 2024, is cancelled since the draft policy letters from DHCS and CDSS are pending. May 31, 2024: • 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: • Tech-Ops will communicate to BenefitsCal technical teams when we there are issues with DEV ForgeRock. August 9, 2024: • Updated the Production Communication plan for BenefitsCal Training environment Update 01 – OWD – CalSAWS – Production Communications • Review with BenefitsCal, ProdOps, TechOps, QA Prepare				

ID	Title	Details	Status	Risk Level	Severity	Date Logged
		for Off-Cycle submission and approval				

<div align="center">

Table 2.3-1 – Project Risks

</div>

Project Issues

ID	Title	Details	Status	Priority	Date Logged
300	Stability of the CalSAWS Enterprise Identity and Access Management Services	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.) May 31, 2024: - 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 June 5, 2024: - 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	2 - Open	High	06/05/24 (Originally logged as Risk #300 on 12/06/23)

ID	Title	Details	Status	Priority	Date Logged
		the DR region restored services Changes to session-management were reverted over the weekend and ForgeRock restored to primary region Partnering with QA to implement deployment validation process that verifies configuration between east and west regions (risk status). June 28, 2024: - 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. July 12, 2024: - 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. August 9, 2024: - The July 12, 2024, release has been running performantly and stabile in the East region			

ID	Title	Details	Status	Priority	Date Logged
		since its deployment. Typical response times in production are between 10-20ms. We see occasionally outlier response times of 1000ms; these are seen a few times per day. • The next scheduled ForgeRock deployment is August 23, 2024. Having demonstrated stability in the East region, the team plans to resume running in the West region.			

<center>**Table 2.3-2 – Project Issues**</center>

2.4   Project Work Plan Reports

Project Timeline
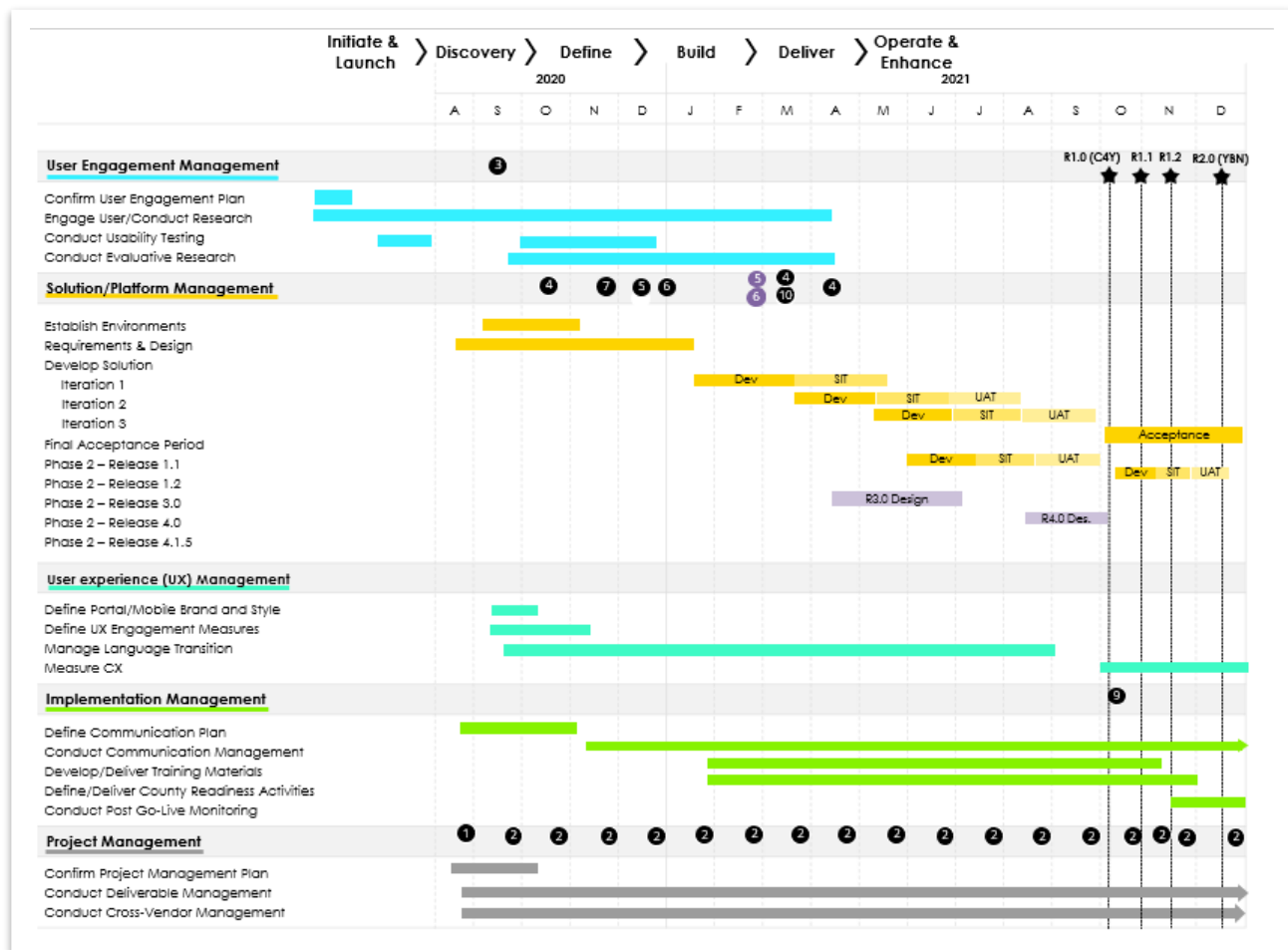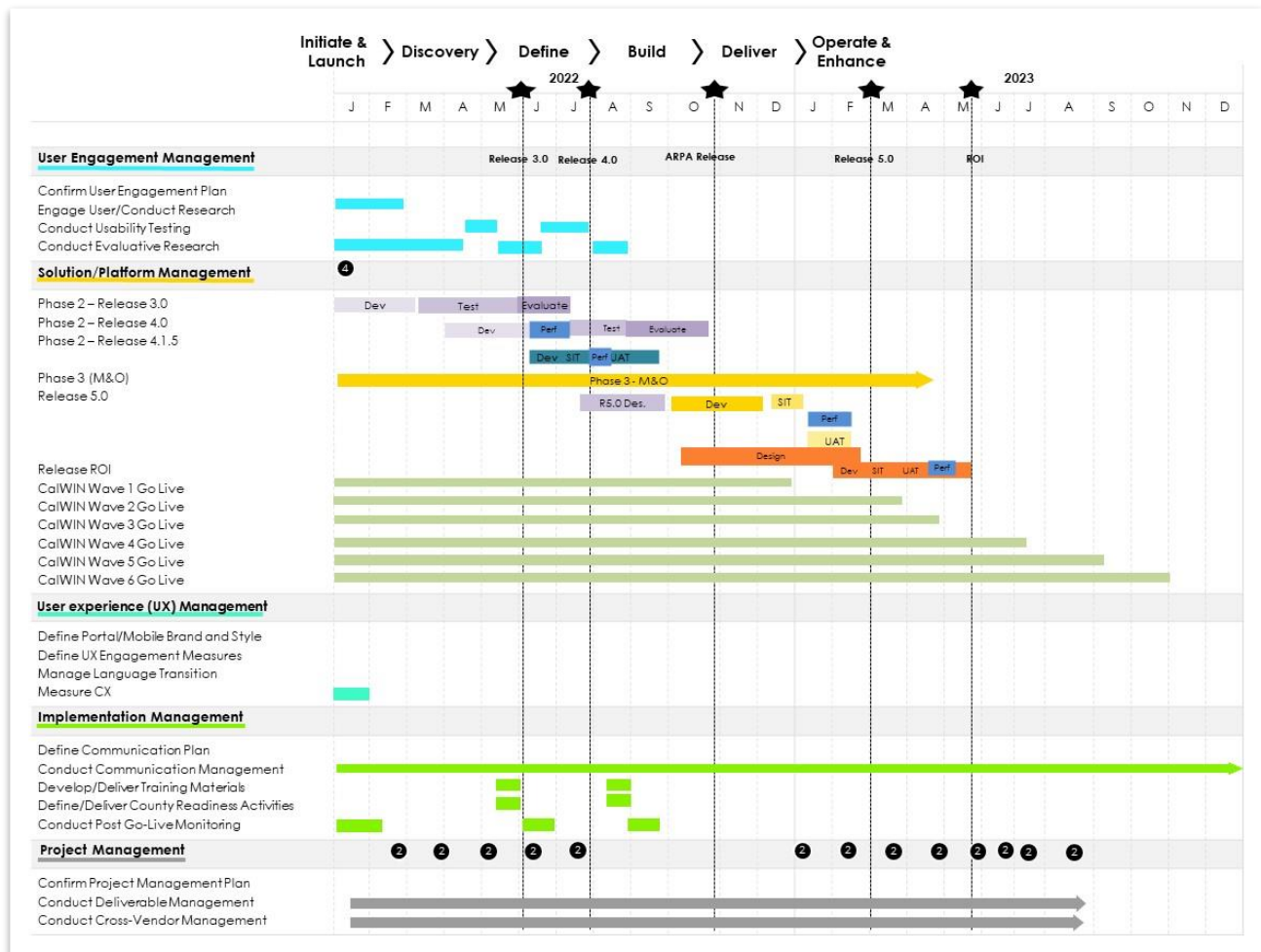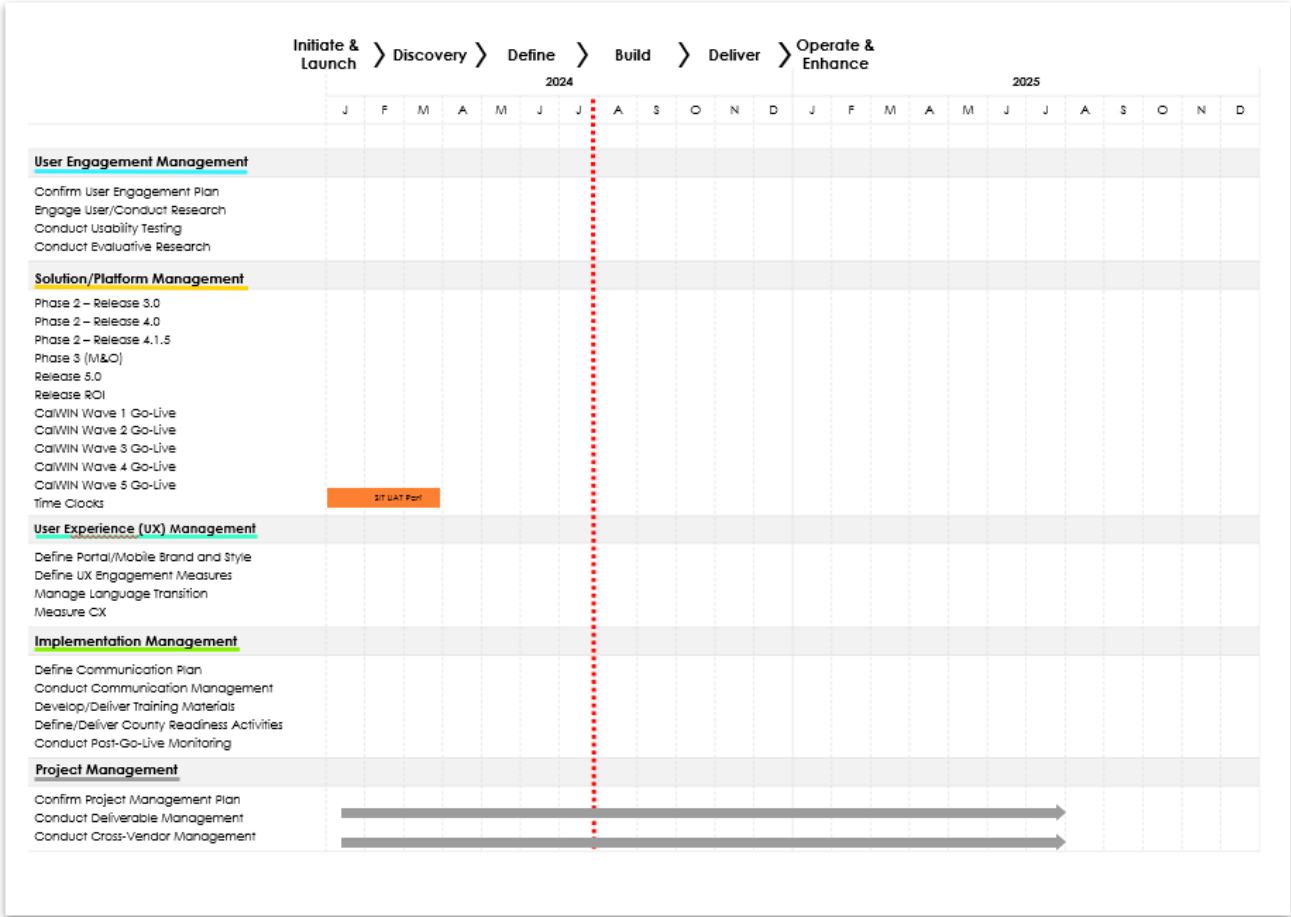
Project Action Items – Overdue

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

ID	Description	Owner	Due Date
None.			

Table 2.4-1 – Overdue Action Items

2.5   SCIRFRA/SCERFRA/SIRFRA/SARRA Information

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

Status	Total
Rejected	0
New/Assigned	0
Completed	3
Reopened	0
In Review	0
Withdrawn	0
Total	**3**

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

Completed

➢ 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)
➢ CSPM-75063: SCERFRA 24-531 – Child support passthrough for Former CalWORKs recipients: Opt Out Option

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	Ready for Review	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	Ready for Review	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	In Progress	Research In Progress; Recruitments done, and focused group sessions scheduled.
Enhancement	CSPM-68266	Link to YouTube Videos on the dashboard and banner	UAT Deployed	Development & SIT Completed; Deployed to UAT.
Enhancement	CSPM-67761	Update Application and RE/SAR 7 Status Tracker	Analysis In Progress	Prioritized for September 2024. Estimation done and consortium approval captured. Analysis In Progress.
Research Item	CSPM-74232	Display RE Steps in Renewal Tracker	Not Started	Prioritized for September 2024. Estimation done and sent for Consortium approval.
Enhancement	CSPM-68268	Update the language options in BenefitsCal to include Mandarin	Ready for Prioritization	Prioritized for October 2024 Monthly Release. Estimation done and sent for Consortium approval.
Research Item	CSPM-74230	Back Button	Not Started	Prioritized for October 2024 Monthly Release. Estimation done and sent for Consortium approval.
Research Item	CSPM-74819	CBO Account Manager Change	Not Started	Prioritized for October 2024 Monthly Release. Estimation done and sent for Consortium approval.

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	Conclude the research.	08/31/24
Research Item	CSPM-71543	Document Upload – Multiple Docs	Conclude the research.	08/31/24
Research Item	CSPM-71552	Orange Banner	Conclude the research.	08/31/24
Enhancement	CSPM-68266	Link to YouTube Videos on the dashboard and banner	Support UAT & Deploy to PRD.	08/29/24
Enhancement	CSPM-67761	Update Application and RE/SAR 7 Status Tracker	Begin with the development.	09/26/24
Research Item	CSPM-74232	Display RE Steps in Renewal Tracker	Capture consortium approval and create research plan	09/30/24
Enhancement	CSPM-68268	Update the language options in BenefitsCal to include Mandarin	Capture consortium approval and start with the development efforts.	10/31/24
Research Item	CSPM-74230	Back Button	Capture consortium approval and create research plan.	10/31/24
Research Item	CSPM-74819	CBO Account Manager Change	Capture consortium approval and create research plan.	10/31/24

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

> ➢ Two (2) incidents were created in the biweekly reporting period for the BenefitsCal Tier 3 Team.

Incidents Resolved

> ➢ The BenefitsCal Tier 3 Team resolved one (1) incident in the biweekly reporting period.

Incidents Closed

> ➢ The BenefitsCal Tier 3 Team closed two (2) incidents in the biweekly reporting period.

Incidents Triaged

> ➢ The BenefitsCal Tier 3 Team has triaged fifty-six (56) incidents in the biweekly reporting period.

Problems Created

> ➢ The BenefitsCal Tier 3 Team created one (1) problem tickets in the biweekly reporting period.

Problems Resolved

> ➢ The BenefitsCal Tier 3 Team resolved one (1) 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.
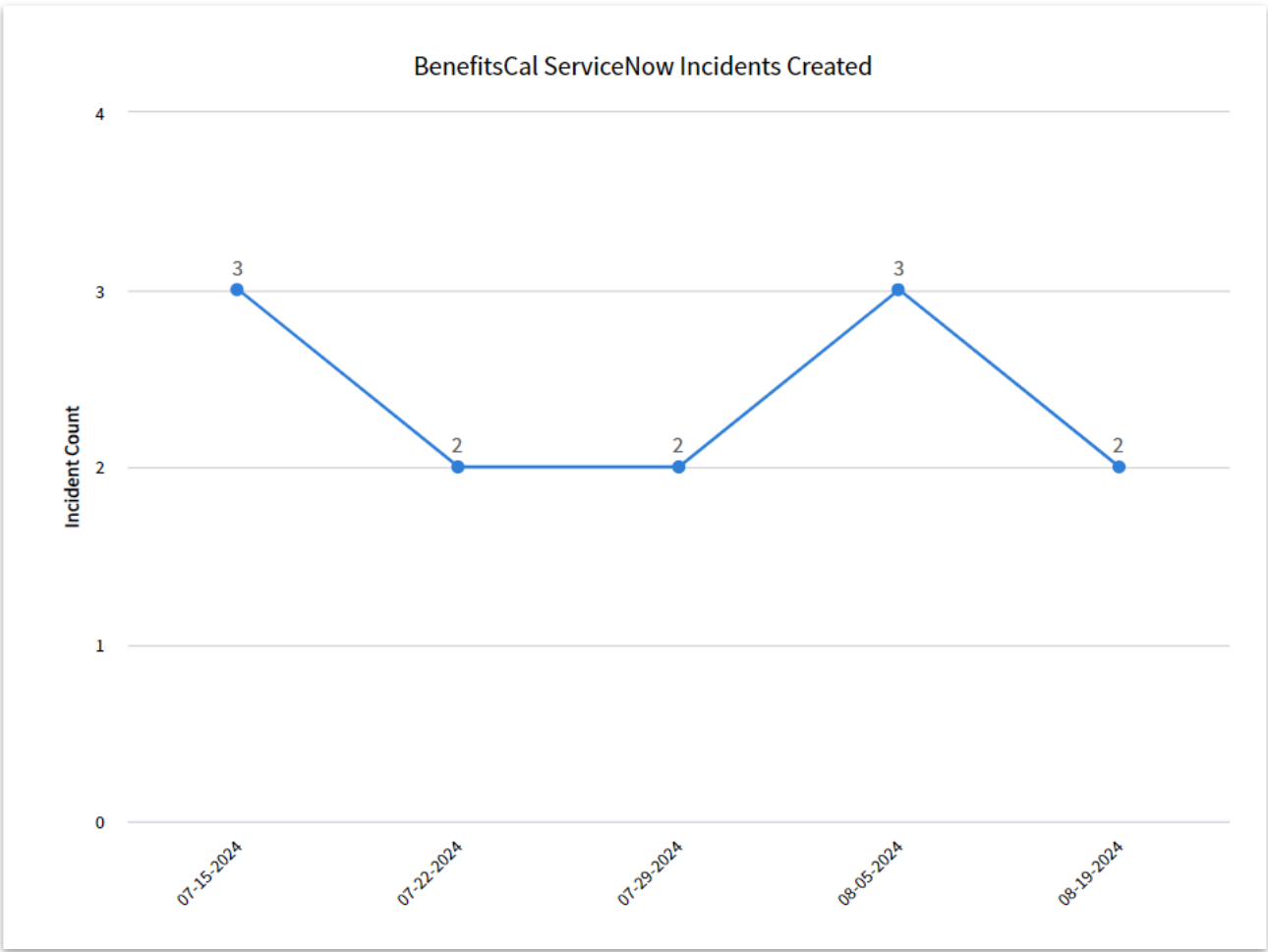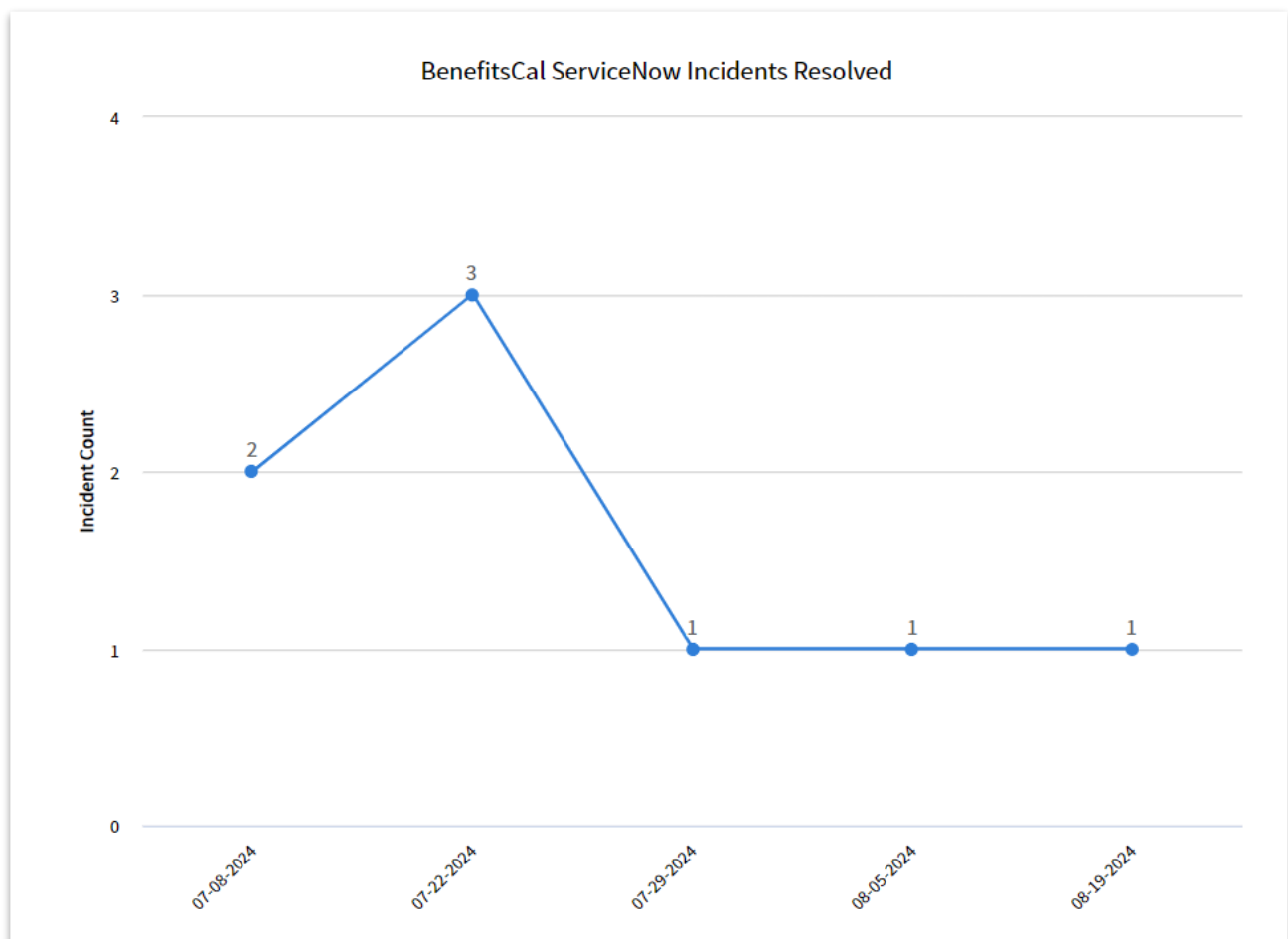
BenefitsCal ServiceNow Incidents Resolved

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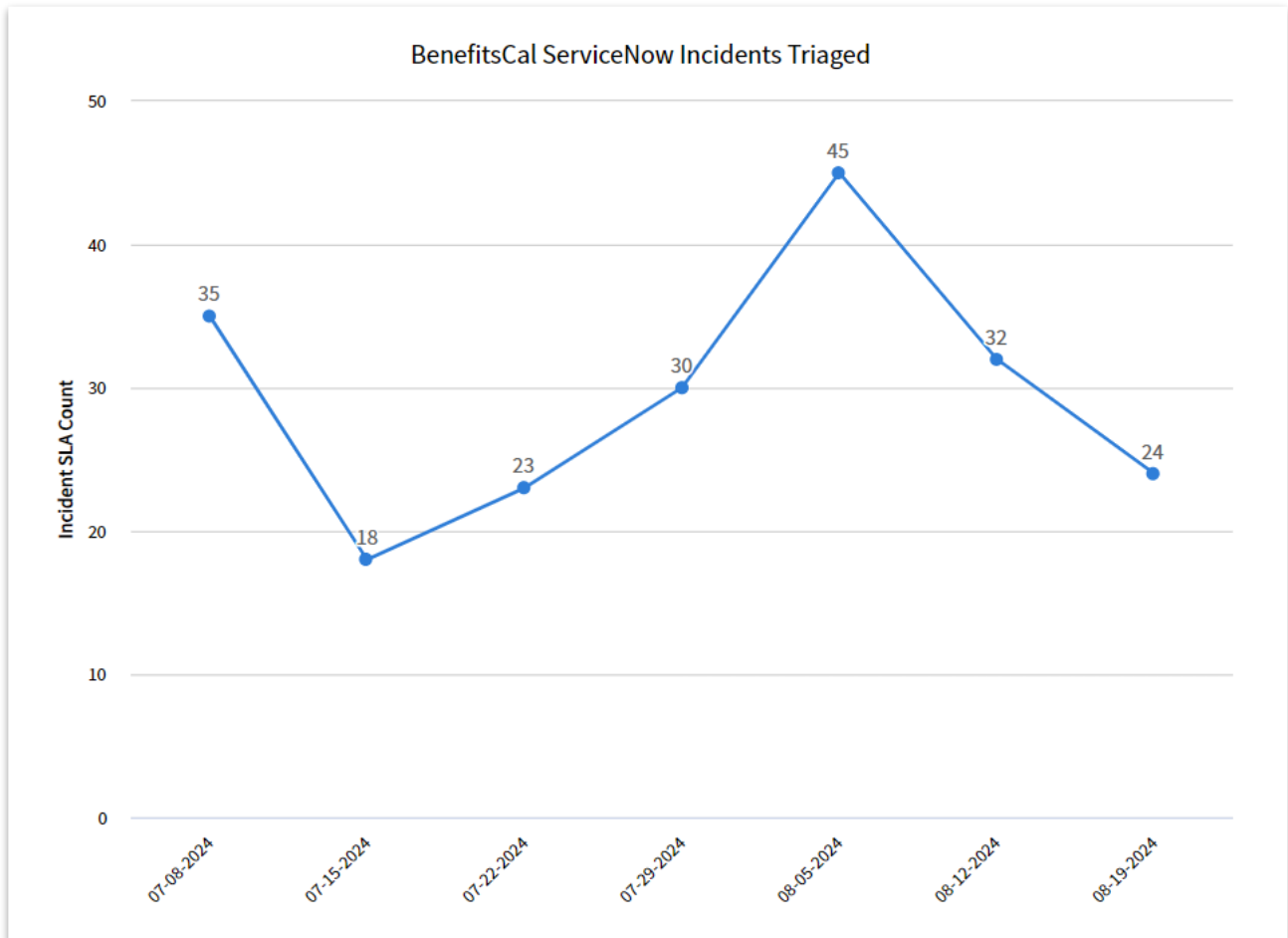
Note: *The graphs represent the ServiceNow incidents associated to all 58 Counties. Incidents represent the first level of ticketing that enters the ServiceNow system. The dates on the x-axis represent the start of week. The metrics does not include "Tier 3 App Support – BenefitsCal Questions (DLT)."*

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

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.

BenefitsCal ServiceNow Problems Created

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

BenefitsCal ServiceNow Incidents by State and Age

Aging Category State	1-5 Days	11-15 Days	16-30 Days	30-60 Days	60-180 Days	>180 Days	Count
New	2	0	0	0	1	0	3
On Hold	0	0	3	3	0	0	6
Resolved	0	0	0	0	0	1	1
Closed	0	73	342	163	122	2	702
Count	2	73	345	166	123	3	712

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

BenefitsCal ServiceNow Incidents by Resolution Code

Legend	
■ Multiple Outreach At... = 884 (19.68%)	
■ How To - Steps to Pr... = 875 (19.48%)	
■ Defect Fixed = 796 (17.72%)	
■ Customer Confirmed I... = 743 (16.54%)	
■ Not a System Error -... = 509 (11.33%)	
■ Customer Requested C... = 264 (5.88%)	
■ Linked to SCR = 150 (3.34%)	
■ Outage / Performance... = 65 (1.45%)	
■ Solved (Permanently) = 64 (1.42%)	
■ Unable to Recreate I... = 59 (1.31%)	
■ Additional Informati... = 57 (1.27%)	
■ Duplicates = 15 (0.33%)	
■ Other = 11 (0.24%)	

Resolution code	Incident SLA Count	Percentage of Incident SLAs
Multiple Outreach Attempts – No Response	884	19.68%
How To - Steps to Proceed Provided	875	19.48%
Defect Fixed	796	17.72%
Customer Confirmed Issue is Resolved	743	16.54%
Not a System Error - With Explanation	509	11.33%
Customer Requested Closure	264	5.88%
Linked to SCR	150	3.34%
Outage / Performance Degradation	65	1.45%
Solved (Permanently)	64	1.42%
Unable to Recreate Issue	59	1.31%
Additional Information Needed	57	1.27%
Duplicates	15	0.33%
Other	11	0.24%
Total	**4,492**	**100%**

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

BenefitsCal ServiceNow Incidents Created by Category

Category(u_category)	Incident SLA Count	Percentage of Incident SLAs
BenefitsCal > Access Issue > Customer	706	15.61%
BenefitsCal > System/Technical Issue	509	11.26%
BenefitsCal > Document Upload	484	10.7%
BenefitsCal > Case Link Request	426	9.42%
BenefitsCal > Renewal/Redetermination/Recertification	263	5.82%
BenefitsCal > Apply for Benefits	260	5.75%
BenefitsCal > Error Message	226	5%
CalSAWS Application/Related Systems > Production > Case Intake/Case Maintenance > E-Applications	215	4.75%
BenefitsCal > Customer Dashboard	206	4.56%
BenefitsCal > Cannot View Case Information	200	4.42%
BenefitsCal > Notices/Documents/Images	195	4.31%
BenefitsCal > Access Issue	189	4.18%
Other	643	14.22%
Total	**4,522**	**100%**

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

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 Programing 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
08/17/24	08/17/24 6:00 am – 3:00 pm PST	CalSAWS Application maintenance (Offline mode)
08/18/24	08/18/24 2:00pm – 6:30 pm PST	CalSAWS Application maintenance (Offline mode)
08/23/24 – 08/24/24	08/23/24 9:30 pm – 2:00 am PST	CalSAWS Application maintenance (Maintenance mode)
08/23/24 – 08/24/24	08/23/24 10:00 pm – 1:00 am PST	CalSAWS Application maintenance (Holding Document transfer queues for Hyland maintenance activity)

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
PRB0049837	Riverside County users are unable to access CalSAWS and associated systems.	08/12/24 7:00 am – 08/12/24 1:00 pm PST	Riverside County users will be unable to access CalSAWS and associated systems until the issue is resolved.	Resolved	CalSAWS
PRB0049889	San Bernardino County users are unable to access CalSAWS and associated systems.	08/16/24 2:15 pm – 08/16/24 3:27 pm PST	San Bernardino County users will be unable to access CalSAWS and associated systems until the issue is resolved.	Resolved	CalSAWS

Ticket ID	Description	Impact Date/Time	Impact	Status	Owner
PRB0049887	Imperial County users the 1676 Baseline Road, Winterhaven site are unable to access CalSAWS and associated systems due to a power outage.	08/16/24 2:10 pm – 08/19/24 5:56 am PST	Imperial County users at the Winterhaven site will be unable to access CalSAWS and associated systems until the issue is resolved.	Resolved	CalSAWS
PRB0049906	Mono County users at the 37 Emigrant Drive, Bridgeport site is unable to access CalSAWS and associated systems due to a power outage.	08/20/24 7:00 am – 08/20/24 9:38 am PST	Mono County users at the Bridgeport site will experience issues accessing CalSAWS and associated systems 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	Resolved	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	Resolved	CalSAWS

Table 4.3-3 – BenefitsCal Incident Follow-Up Summary

4.4   Production Defect Backlog

The Production defect backlog bar chart depicts the balance of open (unresolved Production defects – Red) and closed defects – Green), month-over-month. Defects are closed upon system test validation and release deployment to Production.
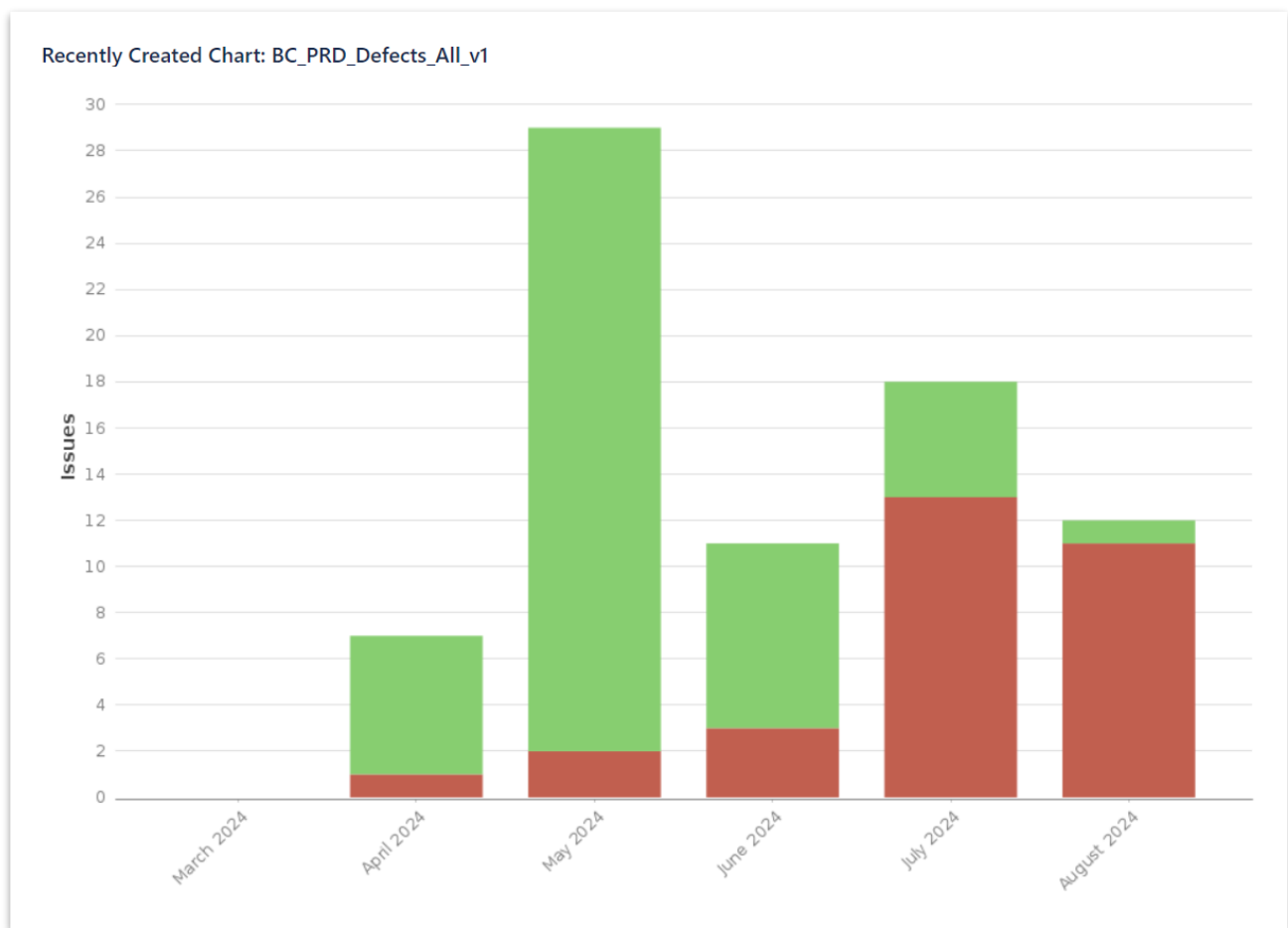
Figure 4.4-1 – Production Defects Backlog Monthly Trend

4.4.1 Release Schedule Production Defect Fix

Severity	Release 24.08.29	Release 24.09.19	Release 24.09.26	Release 24.10.31	Total
1-High	**0**	**0**	**0**	**0**	**0**
New	0	0	0	0	0
In Progress	0	0	0	0	0
Closed	0	0	0	0	0
2-Normal/Medium	**1**	**0**	**0**	**0**	**1**
New	0	0	0	0	0
In Progress	1	0	0	0	1
Closed	0	0	0	0	0
3-Normal/Low	**8**	**1**	**14**	**3**	**26**
New	0	0	0	0	0
In Progress	8	1	14	3	26
Closed	0	0	0	0	0
4-Cosmetic	**0**	**0**	**0**	**0**	**0**
New	0	0	0	0	0
In Progress	0	0	0	0	0
Closed	0	0	0	0	0
Total	*9*	*1*	*14*	*3*	*27*

Table 4.4-2 – Production Defect Fix – Release Schedule

4.5 Production Operations

4.5.1 Root Cause Analysis (RCA)

None for the reporting period.

4.6 Deviation from Plan/Adjustments

None for the reporting period.

5.0   Application Development and Test

5.1   Priority Release Summary

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

BenefitsCal Priority Release

> ➢ None for the reporting period.

BenefitsCal Emergency

> ➢ None for the reporting period.

BenefitsCal Monthly Release

> ➢ None for the reporting period.

Release	Release Date	Summary
24.08.29 – Monthly	08/29/24	Nine (9) 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.
> ➢ Began design work for September 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 (County Welfare Directors Association) Check-In meetings on 08/12/24 and 08/19/24.
> ➢ Hosted Premise Items Planning meeting with CalSAWS on 08/12/24.
> ➢ Hosted a SCERFRA discussion on 08/13/24.
> ➢ Hosted the DDI and M&O Biweekly meetings on 08/13/24, 08/15/24, 08/20/24, and 08/22/24.
> ➢ Attended App Dev meetings with CalSAWS and the Consortium on 08/13/24 and 08/20/24.
> ➢ Hosted a BenefitsCal Pipeline meeting on 08/13/24.
> ➢ Hosted the BenefitsCal PM Stand-Up meeting with the Consortium on 08/14/24 and 08/21/24.

- Hosted a CalFresh-Only Application Flow for FNS (Food and Nutrition Service) review meeting on 08/15/24.
- Hosted the ABAWD (Able-Bodied Adults Without Dependents) Check-in meeting with CalSAWS on 08/15/24.
- Hosted a preparation meeting for the August UCD Monthly meeting on 08/19/24.
- Attended an Application Flow for RCA (Refugee Cash Assistance) TCVAP (Trafficking and Crime Victim Assistance Program) discussion on 08/19/24.
- Attended the SCR CA-257085 and CSPM-64211 discussion meeting on 08/20/24.
- Attended the Connect for BenefitsCal Change – Identify ForgeRock Change meeting on 08/20/24.
- Attended CAPI (Cash Assistance Program for Immigrants) Workgroup on 08/20/24.
- Hosted the UCD Monthly meeting with Advocates and State Partners on 08/21/24.
- Attended the SAWS Policy Implementation meeting on 08/21/24.
- Attended DHCS (Department of Health Care Services) CalSAWS Touchpoint meeting on 08/21/24.
- Attended the BenefitsCal demonstration to FNS on 08/22/24.
- Attended the Response for SCERFRA 24-529 Homeless Assistance on BenefitsCal meeting on 08/22/24.
- Attended the Pre-JAD for Accelerated Enrollment meeting on 08/23/24.

Release 24.08.11 Development

- Completed Development for one (1) defect.
- Provided support to System test 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

- Finalize design work for August 2024 enhancements.
- Continue design work for September 2024 enhancements.
- Continue working with the development and testing teams on the SSA Application on BenefitsCal enhancement CSPM-74637.
- Host the BenefitsCal CWDA Check-in meetings on 08/26/24 and 09/02/24.
- Attend the Pre-Populated SAR 7 follow-up meeting on 08/26/24.

- Attend the BenefitsCal Design walkthrough for SSA on 08/26/24.
- Host the DDI and M&O Biweekly meetings on 08/27/24, 08/29/24, 09/03/24, and 09/05/24.
- Attend the CA-270693 Swagger Review meeting on 08/27/24.
- Host the BenefitsCal PM Stand-Up meetings with the Consortium on 08/28/24 and 09/04/24.
- Attend the CR 278587 Accelerated Enrollment Enhancement – Pre-JAD 3 meeting on 08/28/24.
- Attend the CalWORKs Homeless Assistance BenefitsCal meeting on 08/30/24.
- Attend the 24.09 Integrated Project Readiness T-3 meeting on 09/03/24.

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.

User Engagement

- Conducted county staff generative research sessions for Orange Banner [CSPM-71552].
- Recruited customers for Orange Banner [CSPM-71552].
- Conducted generative research sessions for Orange Banner [CSPM-71552].

Enhancements

- Continued designs for ABAWD.
- Finalized designs for Update styling of selected answers in Chatbot [CSPM-74599].
- Finalized designs for Allow customers to remove their phone number [CSPM-71750]
- Conducted generative research sessions with County workers and Customers for Orange Banner [CSPM-71552].

Advocate Engagement

- Prepared for and facilitated August UCD monthly meeting with Advocates.
- Sent the August UCD monthly meeting comment log to the Advocates.

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.

➤ Analyze Always-on Survey data for August.

User Engagement

➤ Conduct CBO generative research sessions for Orange Banner [CSPM-71552].
➤ Conduct Customer generative research sessions for Orange Banner [CSPM-71552].
➤ Conduct Customer outreach for 'Take it to the lab' items [CSPM-71947]

Enhancements

➤ Conduct generative research sessions for Orange Banner [CSPM-71552].
➤ Plan and prepare for the "Take it to the lab" items [CSPM-71947]
➤ Continue ABAWD designs.

Advocate Engagement

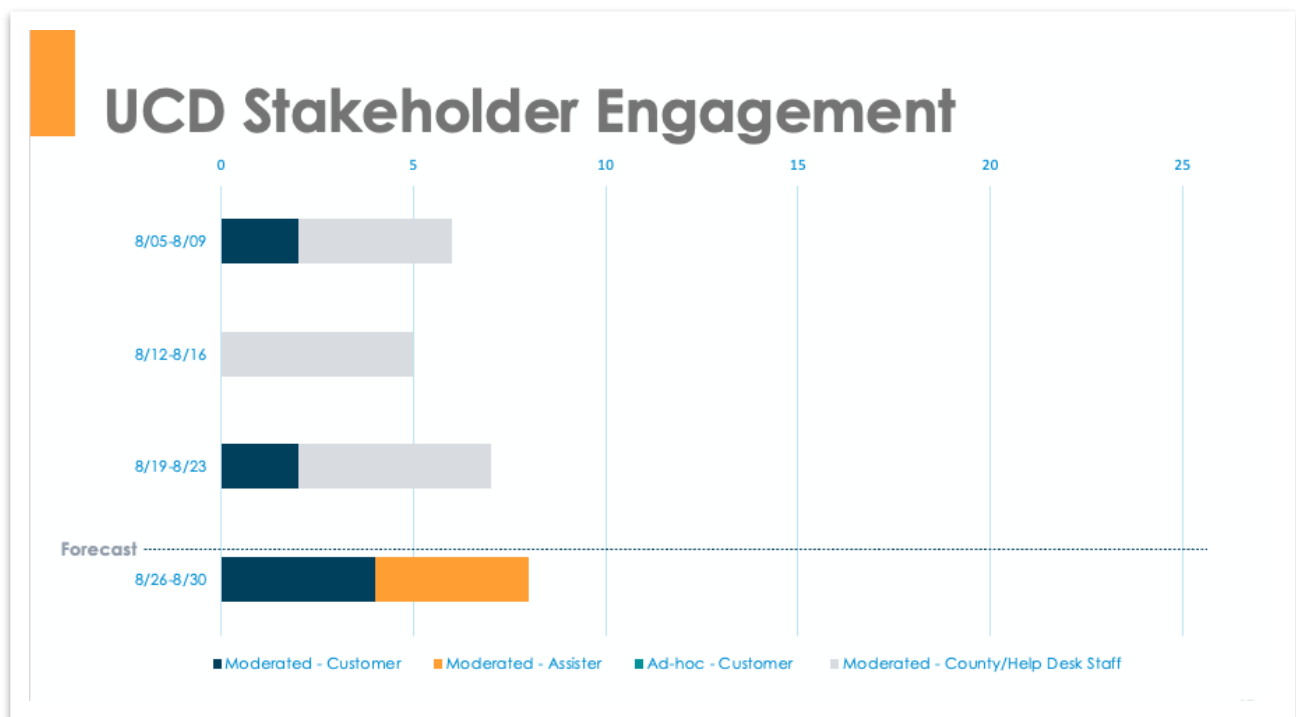➤ Review comment log from the August UCD monthly meeting.

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 08/23/24	Actual for Week Ending 08/23/24	Total Planned for the Release	Comments
Release 24.08.29	1	1	6	Release 24.08.29 is planned for deployment on 08/29/24.
Release 24.09.26	8	8	13	Release 24.09.26 is planned for deployment on 09/26/24. This includes seven (7) GCF Parity enhancements.

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 09/06/24	Total Planned for the Release	Total Completed for the Release	Comments
Release 24.08.11	0	6	6	Release 24.07.25 was deployed to production on 08/11/24.
Release 24.08.29	4	13	8	Release 24.08.29 is planned for deployment on 08/29/24. This includes seven (7) GCF Parity enhancements.

Table 5.3-2 – Planned Enhancement Work

Unscheduled Release Updates

➢ **Chatbot**
  o 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.
  o 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

> ➢ Deployed the August Priority Release in Production on 08/11/24.

Release 24.08.29 – August Priority Release

> ➢ Validated the tickets tagged to the August Monthly Release.

5.4.2   Activities for the Next Reporting Period – System Test Execution

Release 24.08.29 – August Monthly Release

> ➢ Deploy the August Monthly Release in Production on 08/29/2024.

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 24.08.11 – August Priority Release

> ➢ Deployed the August Priority Release in Production on 08/11/24.

Release 24.08.29 – August Priority Release

> ➢ Validated the tickets tagged to the August Monthly Release.

5.6.2   Automated Regression Test (ART) Coverage

The following are the automated regression scripts executed for regression in BenefitsCal for Release 24.08.29.

Release	# of Scenarios Executed	# of Scenarios Passed	# of Scenarios Failed	Overall Pass%	Pass of Executed	Coverage
24.08.29	56	56	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. We will also validate following flows with data in every field – AFB with all programs, CF37, DCF, MC 210, Redet CWF, MC 216, MC 217, CF Only AFB, GA/GR, Redet CW, CW Only AFB, MC Only AFB, RAC, SAR 7

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 successfully executed two (2) rounds of performance tests for the August monthly release with two (2) enhancements (Technical – minimize the data available to the customer in the browser and Runtime Upgrade of python lambdas from 3.8). The team rescripting the scenarios with the release implementations and changes and validated the scripts on the latest build/codebase. After the first test execution, the team observed an overall increased response time across the application resulting in lower achievement of the business metrics as compared to previous baseline result. No root cause was identified for the increased response time from a further deep dive, but the team is troubleshooting the results further to understand the increased response time behavior. The team executed the second test, and the results were consistent in the average response time and errors with the previous baselines. The detailed JMeter reports, and the results comparison spreadsheet are uploaded to the CalSAWS SharePoint.

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	**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. **Executions**: BenefitsCal isolated Load tests with mock services: • Tuesday, August 20 **(Completed)** • Wednesday, August 21 **(Completed)**	100%

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

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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 08/23/24.

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7.2.2   Activities for the Next Reporting Period – Security

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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

➢ None for the reporting period.

8.2 Activities for the Next Reporting Period

➢ BenefitsCal Release notes for monthly release 24.08.29.