

Welcome Back

Breakout Session 1

***Mission:
Possible***

The logo consists of the words "Mission:" and "Possible" stacked vertically. "Mission:" is in a bold, italicized, black sans-serif font, while "Possible" is in a lighter, italicized, teal sans-serif font. The text is centered within a circular graphic made of concentric rings, with a teal-to-white gradient. The background of the entire slide is a futuristic, teal-toned digital environment with floating data screens, network maps, and glowing lines.

Mission:
Possible

Breakout Session 1:
Mission Critical: Harnessing
Analytics for Better Decisions

Presentation Team

CalSAWS Special Agent

**SANDEEP
AJI**

Code Name: Fuchsia EDBC Operative

Assignment:

CalSAWS Chief Technology Officer

Specialties:

**Technology Innovation, Data, AI and
Cloud Architectures**

Current Location:

Undisclosed, USA

Random fact:

**Hosts Curry and Karaoke parties at
home**



Lead Agent

CalSAWS Special Agent

**WENDY
BATTERMANN**

Code Name: Canary Cash Striker

Assignment:

QA Executive

Specialties:

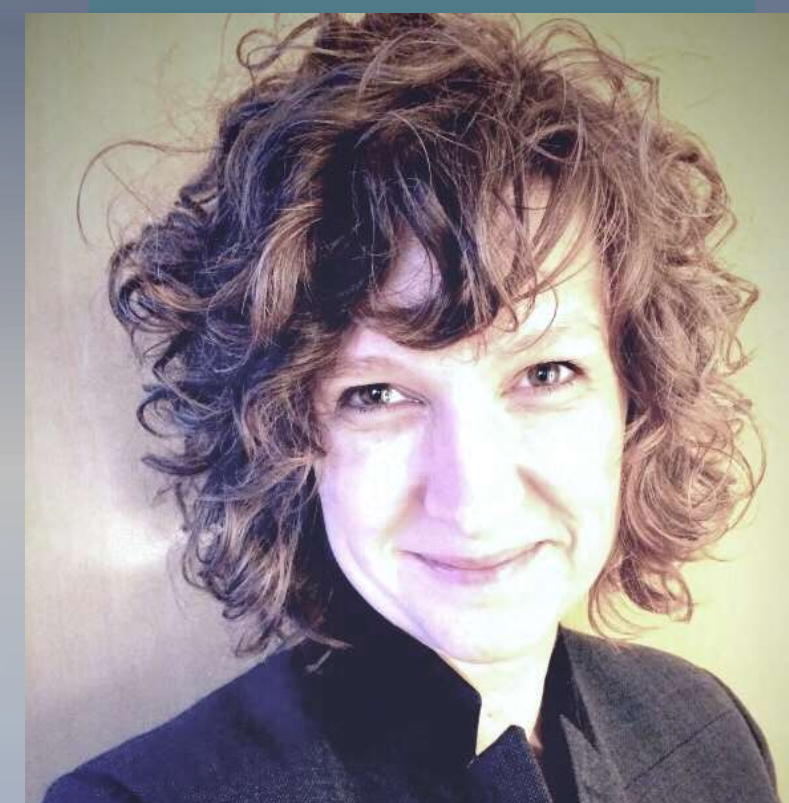
**QA, Project Management, Making
Things Better / Getting It Done**

Current Location:

Undisclosed, USA

Random fact:

Likes dogs, plants, and dad jokes



Our Top Agents

Panel Members



County Special Agent

**SHAWN
AMIEL**

Code Name: Fuchsia EDBC Striker

Assignment:
**Los Angeles Division Chief and
Region 6 PSC Member**

Specialties:
**GR, GR's WTW program START, and
CalFresh Programs**

Current Location:
Undisclosed, USA

Random fact:
Has been skydiving twice.



County Special Agent

**RACHEL
EBEL-ELLIOTT**

Code Name: Crimson MEDS Maverick

Assignment:
**Deputy Director of
Mendocino County DSS, R3 PSC**

Specialties:
Medi-Cal, Inter-County Transfers

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County Special Agent

**PHILLIP
MAU**

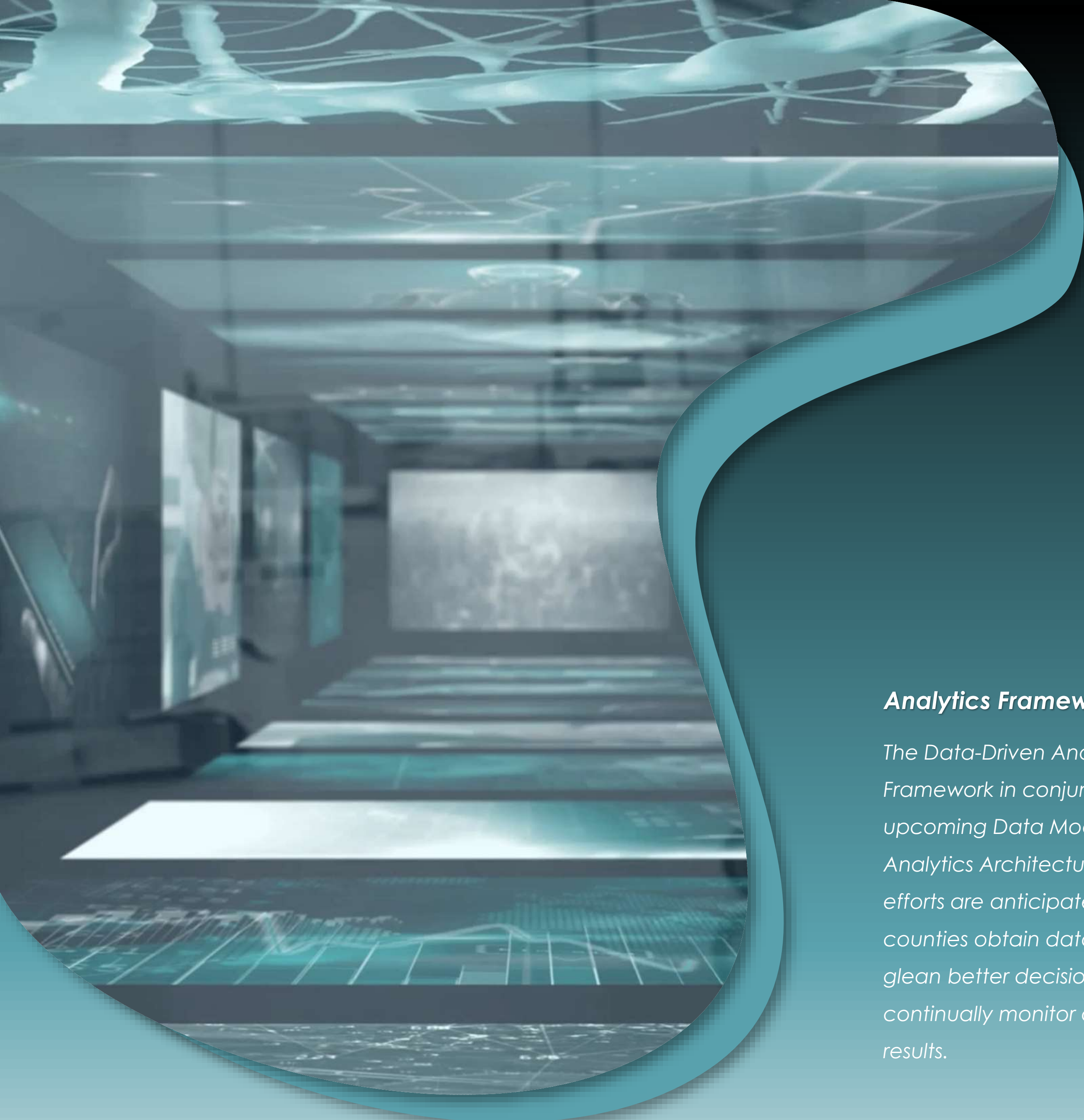
Code Name: Rose Ad Hoc Ops Specialist

Assignment:
**San Francisco Alignment and
Guidance Program Director**

Specialties:
Data and Reports

Current Location:
Undisclosed, USA

Random fact:
**Plays with a Rubik's cube when
can't solve a problem.**



AGENDA

Mission Critical: Harnessing Analytics for Better Decisions

Analytics Framework for Decisions

The Data-Driven Analytics Framework in conjunction with the upcoming Data Modernization and Analytics Architecture evolution efforts are anticipated to help counties obtain data more easily to glean better decisions and then continually monitor and improve results.

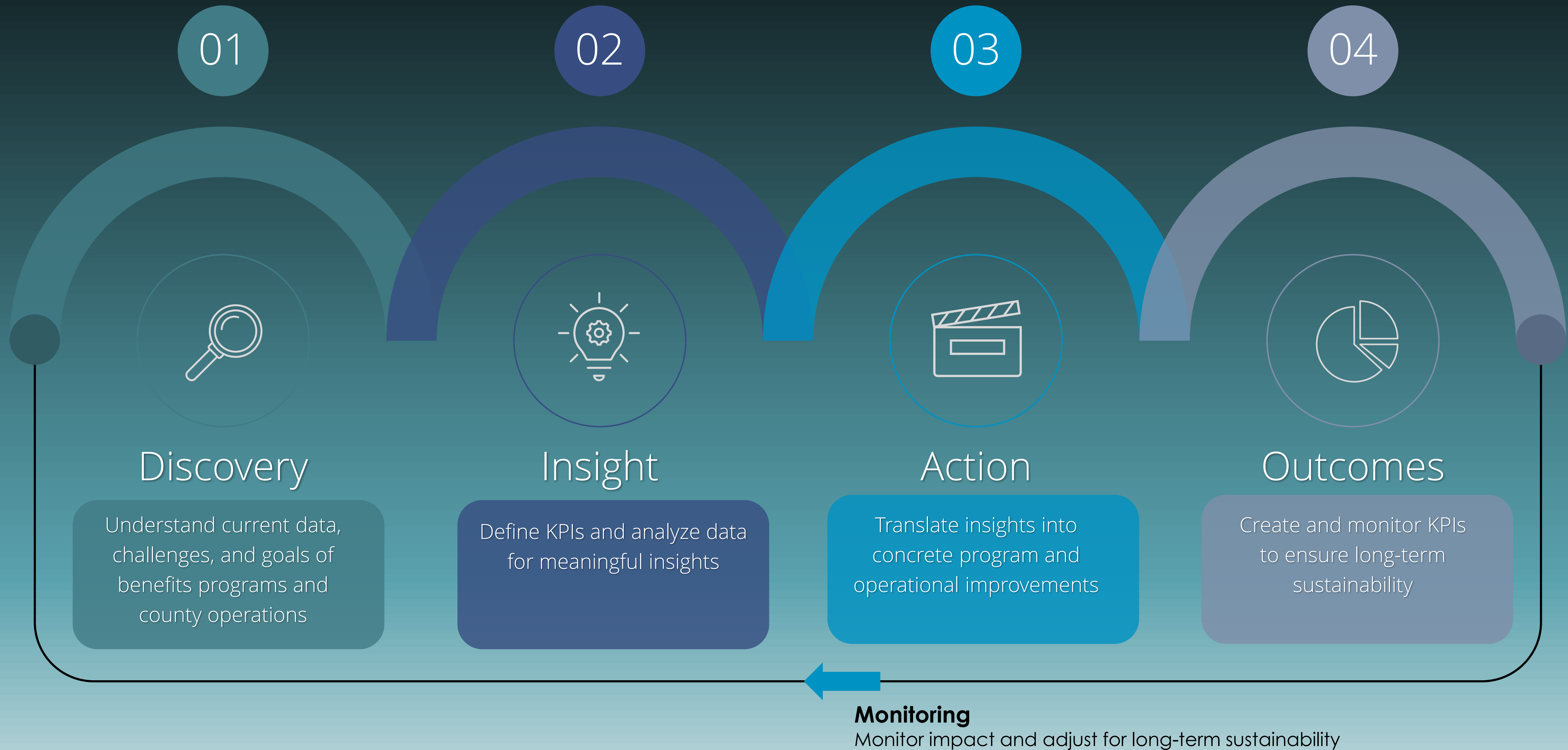
- Introductions
- Data-Driven Decisions and Analysis Framework
- Counties Using Data-Driven Framework
- Understanding CalSAWS Data Architecture
- CalSAWS Data Modernization Efforts, including how they support CalSAWS Objectives
- Panel Discussion

What is a Data-Driven Decision?

Decision based in facts, metrics, and data that helps guide business and strategic decisions to better align with and meet goals, objectives, and priorities.

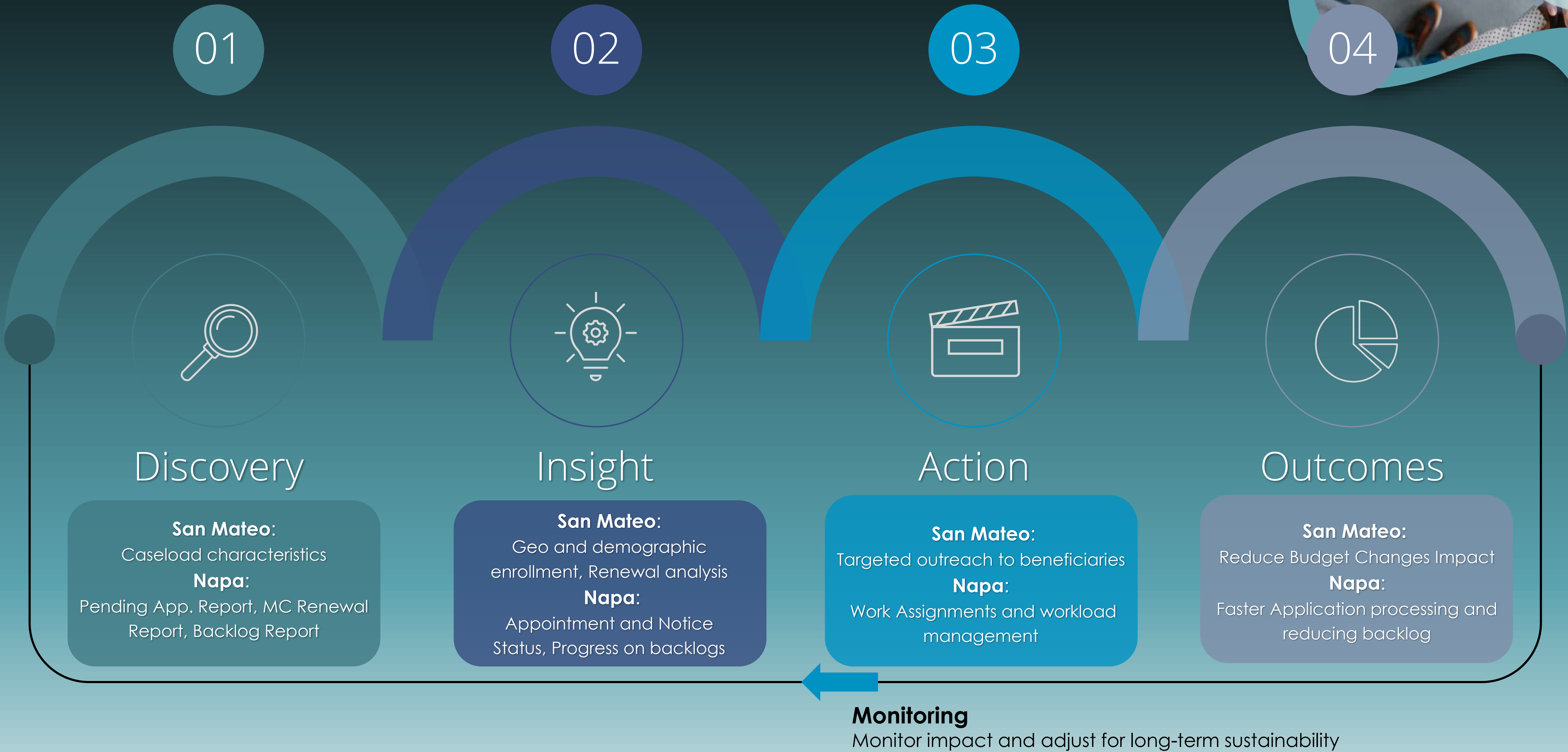
How do I use it my organization?

Data-Driven Analysis Framework



Napa and San Mateo

Data-Driven Decision Examples





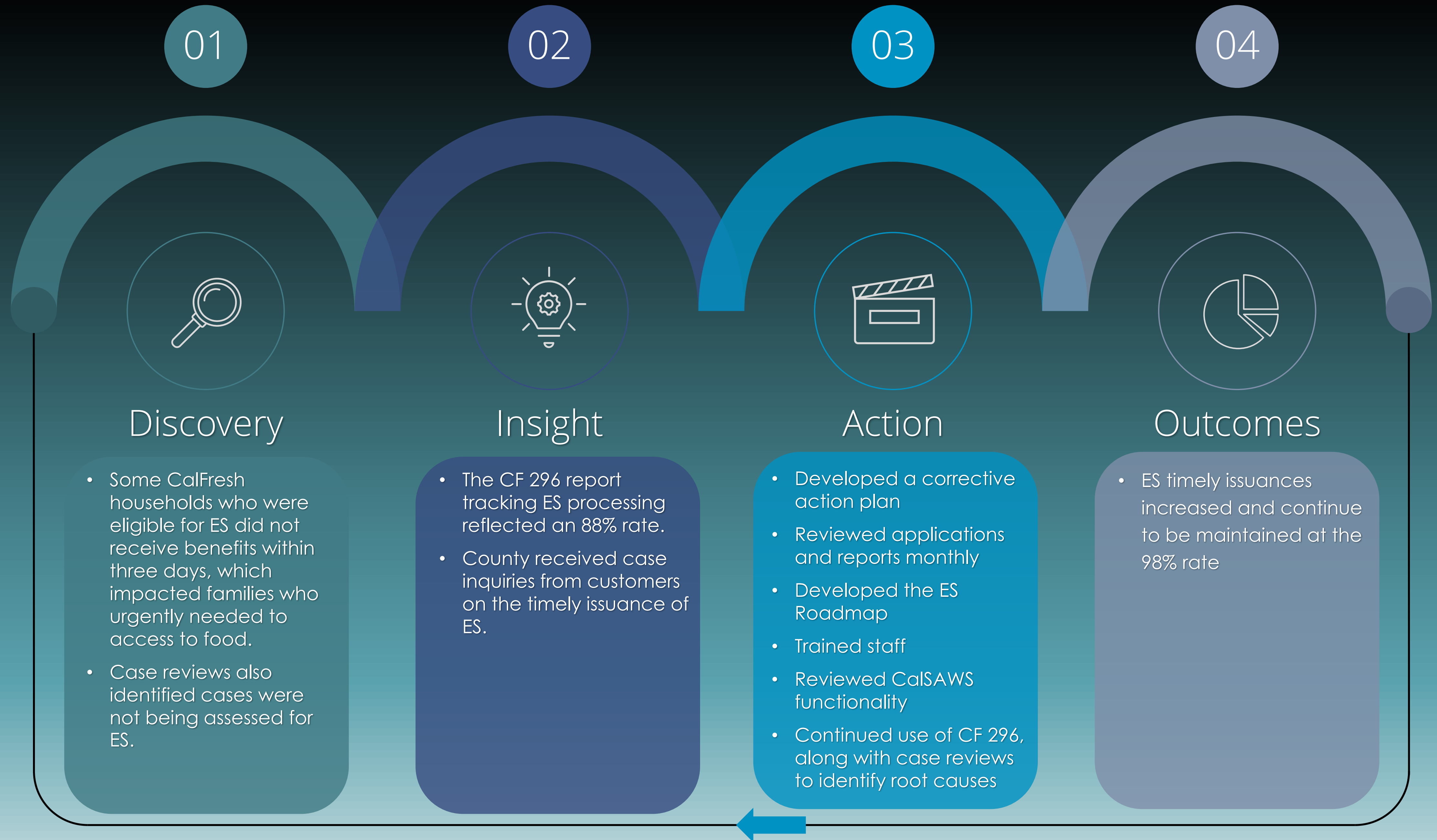
***Mission:
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Counties Using Data-Driven Framework

CalFresh Expedited Services Processing Case Study

- CalFresh regulations state that all applications must be evaluated for Expedited Services (ES) within three days of the application date.
- The ES rate should be at 90% or above.





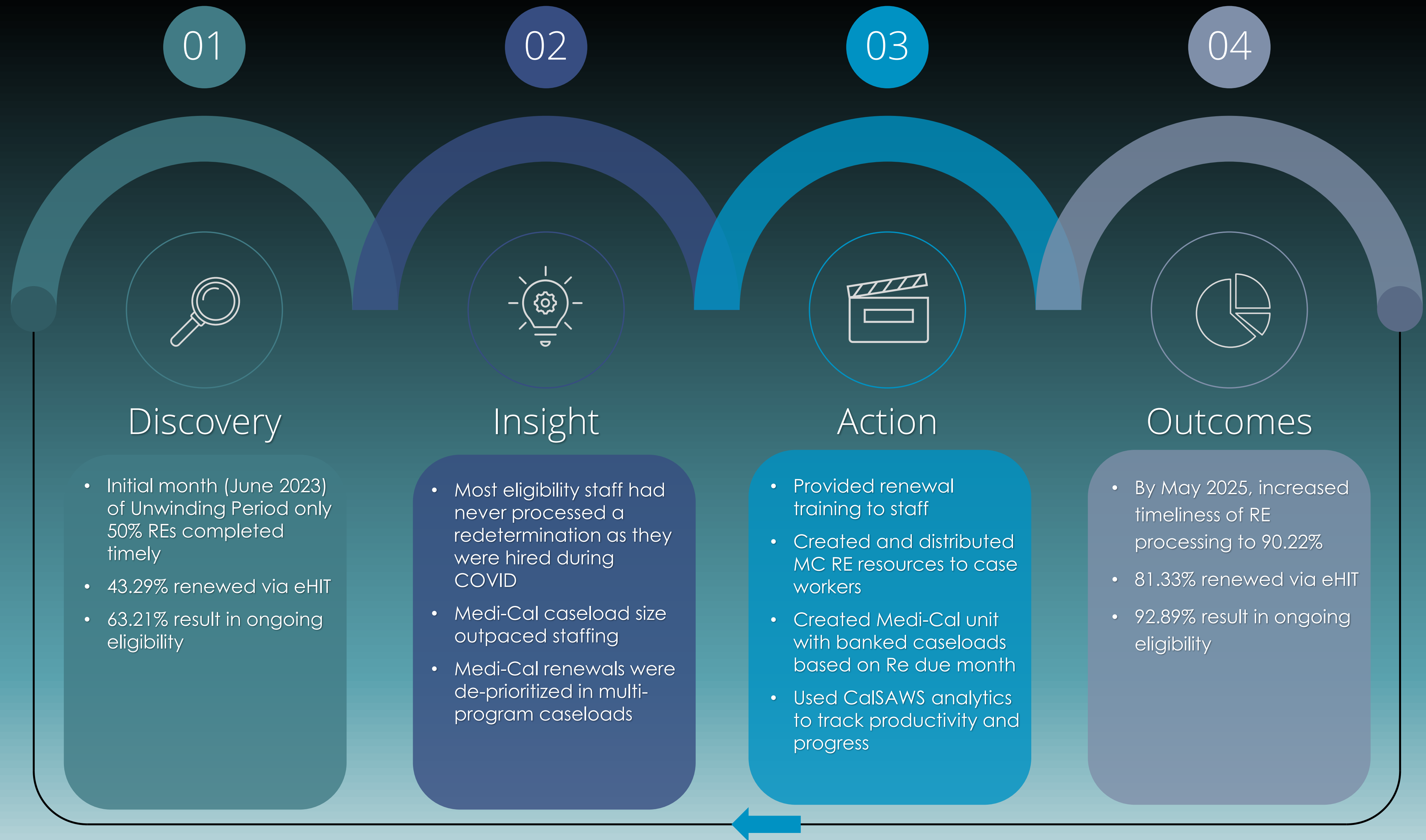
Medi-Cal Redeterminations--Unwinding

Case Study



***Mission:
Possible***

- Annual redeterminations for Medi-Cal shall be completed within 60 days of the recipient's annual redetermination date.
- State target for timely processing of Medi-Cal redeterminations is 90% .



CalFresh/Medi-Cal Contact Center Case Study

- High abandon rate, wait times, and call backs after being on CalSAWS for 2 months
- Leveraged SOS calls every day
(SOS = all workers needed on the phone due to the long wait times)
- Contact Center clients were being sent to local offices
- High number of overdue tasks



01



Discovery

- Began to investigate high abandon rate, wait times, and call backs after 2 months on CalSAWS
- Data Reporting and Analytics (DRA) team began pulling data daily from Calabrio and AWS
- Lobby clients indicated they tried to call the Contact Center and were told to go into the office

02



Insight

- For overdue tasks, workers were informing call-in clients that their assigned worker would look into their case
- DAR team noticed that workers were taking calls that were less than 1 minute, but After Call Work – 15 minutes was consistently at 15 minutes

03



Action

- Implemented FCR
- HR instructed staff to reduce Language Line usage – it dramatically increased since migrating to CalSAWS
- DAR team worked directly with CalSAWS to look at AWS Routing profiles to explore how to connect monolingual clients to bilingual workers

04



Outcomes

- May 2024 - Abandon rates reduced **from 36.9% to 1%** during 1-10 days of month
- April 2025 - Abandon rate at **0.22%**, 14 seconds average wait time, average 1,221 calls/day
- SOS calls are rarely used
- 3-Minute time threshold for monolingual speakers

CalFresh/Medi-Cal Contact Center

Case Study



Trends

June 2023 [Avaya]
Abandon Rate: 12%
Average Incoming Calls/Day: 1,384
Average Wait Time: 4.3 Minutes
Average Phone Staffing: 47 in AM/48 in PM
Average Call Backs/Day: N/A

January 2024
Abandon Rate: 36.9%
Average Incoming Calls/Day: 1,652
Average Wait Time: 21.9 Minutes
Average Phone Staffing: 59 in AM/70 in PM
Average Call Backs/Day: 210
Customers in Lobby for CF/MC: 4,346

May 2024
Abandon Rate: 1%
Average Incoming Calls/Day: 1,159
Average Wait Time: 36 Seconds
Average Phone Staffing: 55 in AM/65 in PM
Average Call Backs/Day: 13
Customers in Lobby for CF/MC: 3,944

Any Questions?



Panel Members



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**SHAWN
AMIEL**

Code Name: Fuchsia EDBC Striker

Assignment:
**Los Angeles Division Chief and
Region 6 PSC Member**

Specialties:
**GR, GR's WTW program START, and
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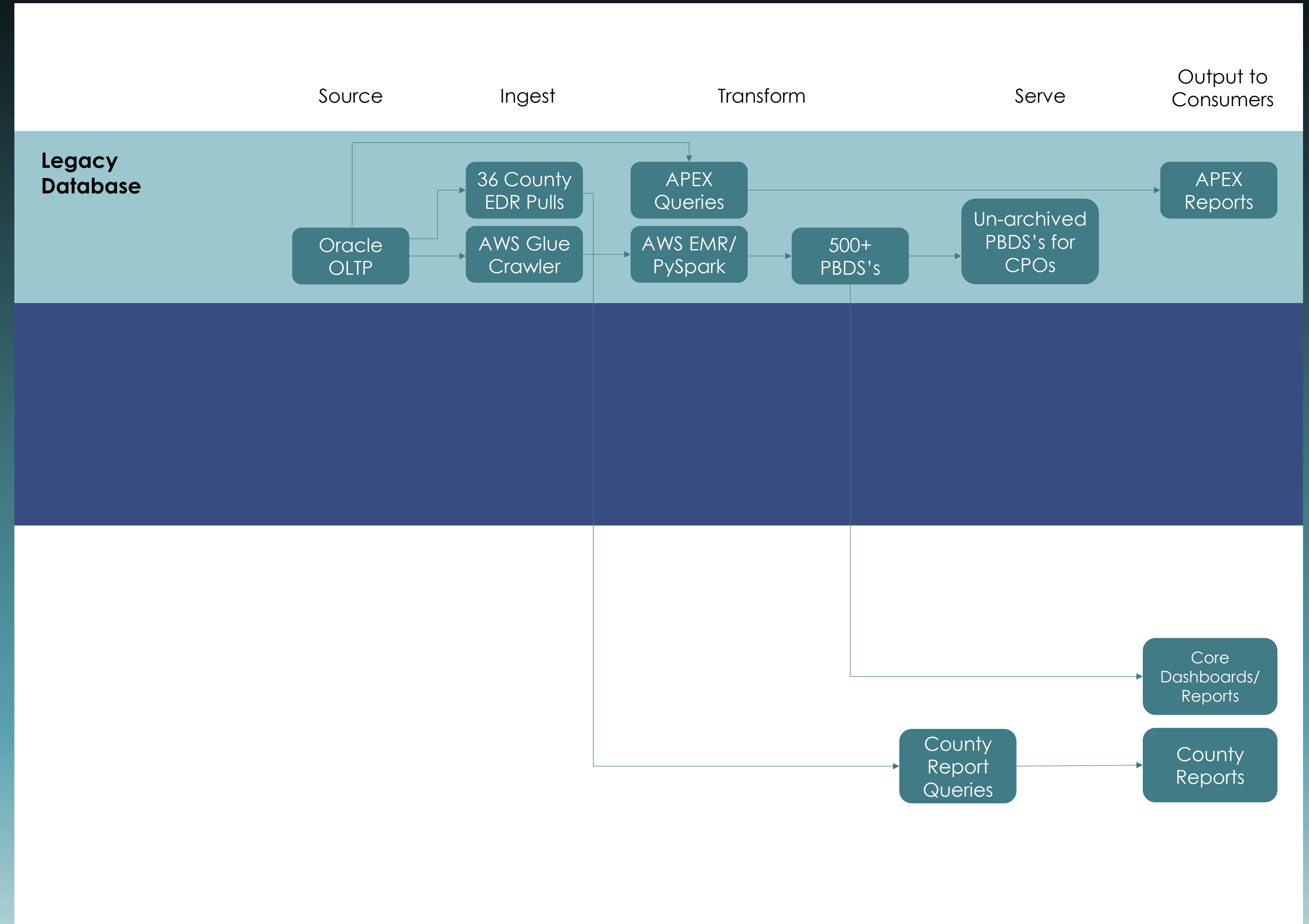
***Mission:
Possible***

Understanding CalSAWS Data Architecture

Current CalSAWS Data Ecosystem

Highlights

- Data is transformed from the CalSAWS transactional database directly to the datasets that feed each core report and dashboard.
- APEX is used by many counties for supplemental reports.
- 36 counties pull CalSAWS data to their local databases to use as a local reporting data source.
- Ancillary data not available (Contact Center, BenefitsCal, etc.)



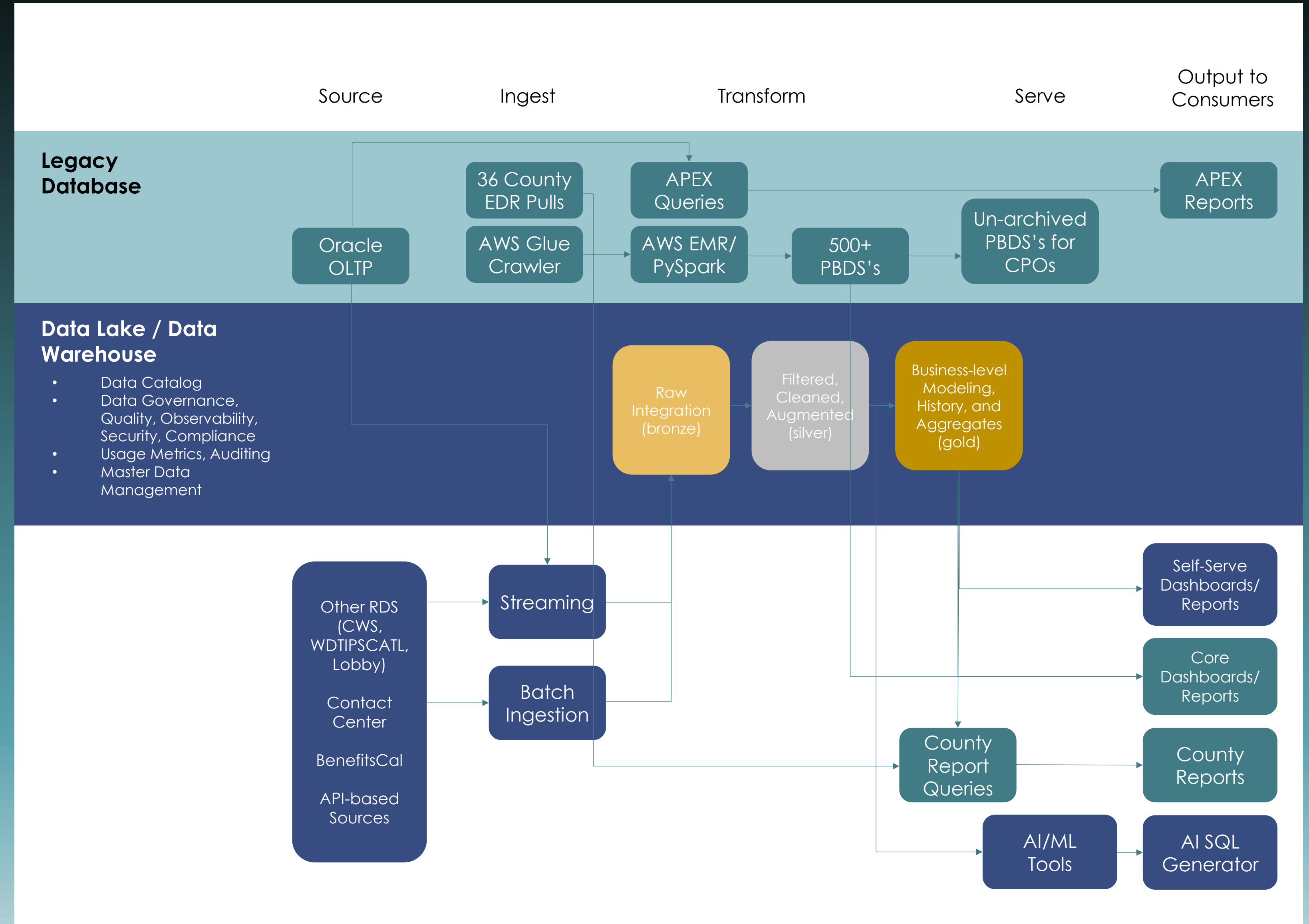
Current Data Analytics Challenges

DATA CHALLENGES	USAGE CHALLENGES
MULTIPLE SOURCES OF DATA	DATA SILOS PREVENT 360-DEGREE VIEWS
NO ANALYTICS DATA MODEL	INCOMPLETE DATA CATALOG, DATA LINEAGE, DOCUMENTATION
DATA RECONCILIATION CHALLENGES	NO SELF-SERVE OPTIONS FOR REPORTS OR DASHBOARDS
“HONOR SYSTEM” DATA ACCESS	HISTORIC DATA LACKING
REPORTS/DASHBOARDS ARE TIME-CONSUMING TO MODIFY	NO SUPPORT FOR AI/ML TOOLS

Conceptual Modern Analytics Architecture

Highlights

- Data Warehouse layer is introduced.
- Core CalSAWS reports, supplemental reports, county reports – would all use the same source data.
- Data catalog, data governance, security, master data management, compliance, and data lineage would be part of the proposed solution.



Modern Analytics Platform

Data-Driven Decisions to Meet Objectives

Objective 1: Enhance Self-Service Access

This objective is about increasing the adoption of BenefitsCal and other ancillary features that may be available through CalSAWS, as well as continuously improving the self-service experience.

- ✓ **Customer Access Pain Points and Successes**
- ✓ **Productivity Analysis**
- ✓ **Eligibility Analysis**
- ✓ **Application Processing Performance**
- ✓ **Call Center Analysis**



Modern Analytics Platform

Data-Driven Decisions to Meet Objectives

A graphic in the top right corner featuring a circular seal with the text "Mission Possible" in a stylized font. The seal is overlaid on a background image of several people's hands stacked together in a circle, symbolizing teamwork and collaboration.

***Mission:
Possible***

Objective 2: **Streamline Administrative Processes**

This objective includes reducing the time spent on administrative tasks by eligibility staff through automation. Assisting with the accuracy of data entry, imaging, and processing in the system through error checking/quality control alerts. Workload management and Inter-county transfers (ICTs) would also fall under this objective.

- ✓ **Churn Analysis**
- ✓ **Program Participation**
- ✓ **Administrative Processing Times**
- ✓ **Staffing Needs, Levels, and Constraints**
- ✓ **Trends on Efficient Service Delivery Methods**

Modern Analytics Platform

Data-Driven Decisions to Meet Objectives



***Mission:
Possible***

Objective 3: **Enhance User Experience & Support**

This could include increasing the intuitive nature of CalSAWS through Contextual Assistance: The system offers real-time help, explanations, or tips tailored to the user's actions. This could be in the form of tooltips, brief descriptions, or visual cues that explain what each step does and why it is necessary, helping users understand the process as they go. Or, implementing a comprehensive online self-help portal and guided navigation for BenefitsCal, reducing the need for phone or in-person support.

- ✓ **Demographic Analysis**
- ✓ **Language Analysis**
- ✓ **Geographic Analysis**
- ✓ **Customer Experience Journey/Trends**
- ✓ **Customer Support Successes**
- ✓ **Additional Support Areas**

Modern Analytics Platform

Data-Driven Decisions to Meet Objectives



Objective 4: Enhance Reporting, Analytics, and Client Communication Capabilities for Greater Flexibility and Insights

This includes improved ad hoc reporting functionality and evaluating current reporting needs. Streamlining to client correspondence/notices.

- ✓ Insights Into Staff/Department Successes And Areas
- ✓ County/Department Productivity
- ✓ Data Dashboards to Provide Real-time Insights
- ✓ Missing/Incomplete Data
- ✓ Error Rate Monitoring
- ✓ Duplicate Records Analysis
- ✓ Duplicate Benefits Analysis
- ✓ Household Data Consistency
- ✓ AI/Machine Learning Models to Flag High-Risk Applications

CalSAWS Analytics Milestones - Proposed

		MILESTONE 1	MILESTONE 2	MILESTONE 3
		Foundational Platform & Migration	Continued Integration & Governance	Analytics Refinement
Features Enabled		<ul style="list-style-type: none"> Stand up Data Lakehouse Establish best practices Automate ingestion Migrate existing reports/dashboards 	<ul style="list-style-type: none"> Additional data sources Self-service business intelligence Stream data for real-time performance Chat-based analytics interface 	<ul style="list-style-type: none"> Ingest images and documents Provide Customer 360 view Integrate key additional data sources
Value for Counties		<ul style="list-style-type: none"> Direct County access to gold layer data Limited disruption to existing reports Ease of finding right data for business needs 	<ul style="list-style-type: none"> Insights from Call Center, BenefitsCal, etc. Customizable reports and dashboards Faster insights available to more users Optimized workload management 	<ul style="list-style-type: none"> Single, unified, data platform Analysis across multiple data sources Improved customer service Eliminate need for complex County ETLs
Value for CalSAWS		<ul style="list-style-type: none"> Increased performance of data pipelines Timely and accurate data ingestion Faster report rendering 	<ul style="list-style-type: none"> Proactive alerting to data issues Less time spent on fixing defects Improved security, governance and compliance 	<ul style="list-style-type: none"> More time for value-added tasks Leverage user behavior data Improved program integrity Improved compliance insights



Video Message

Analytics Platform Demo



Importance of Data in
Effective Decision-Making

Panel Discussion

Panel Members



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Any Questions?



Let's Take a Quick Break

We will resume in the
California Ballroom at 3:15 PM

***Mission:
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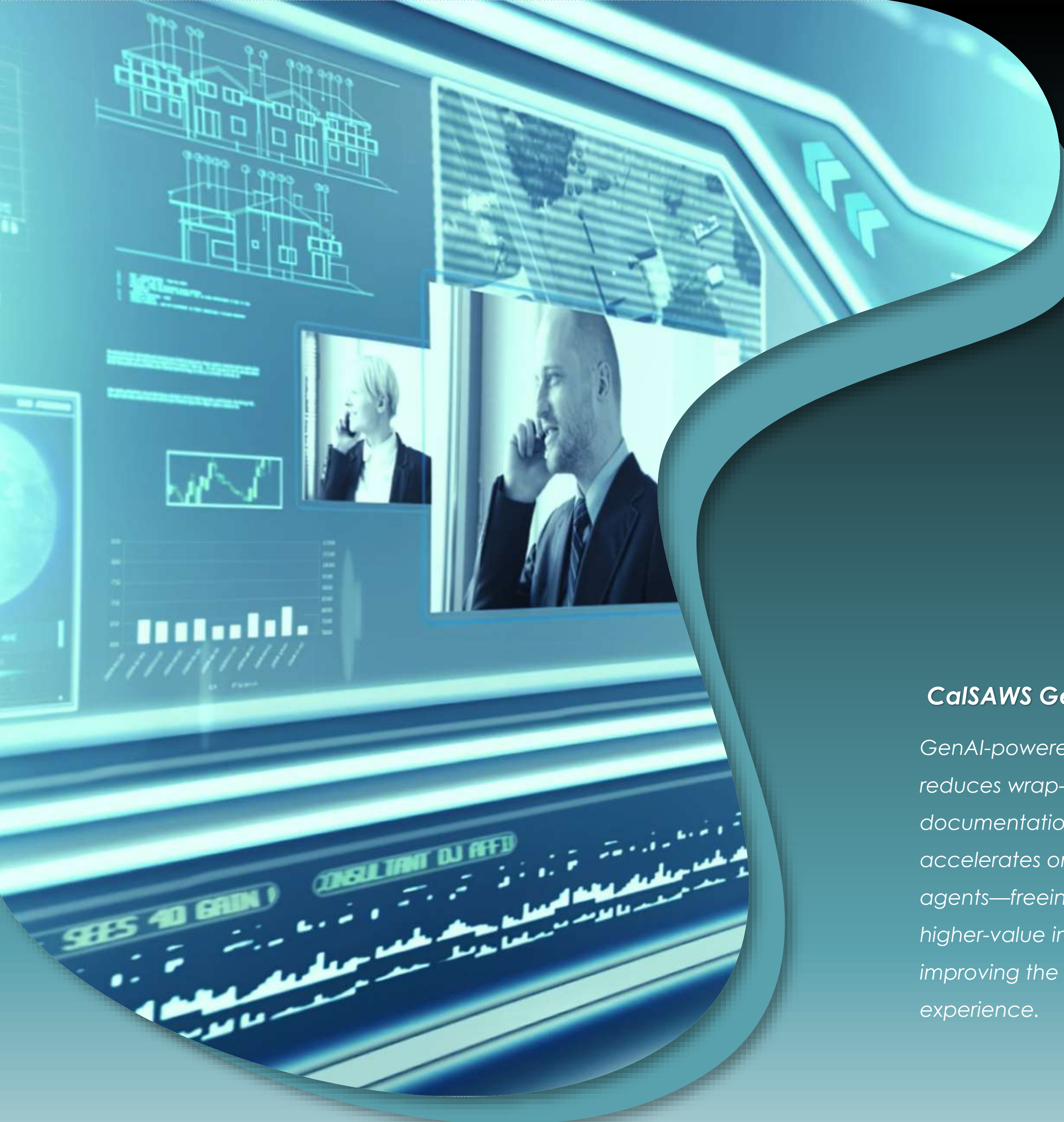
Welcome Back

Plenary 2

***Mission:
Possible***

Plenary 2
Mastermind: Gen AI Call
Summary Prep and Tools





AGENDA

Mastermind: Gen AI Call Summary Prep and Tools

CalSAWS Gen AI Capabilities

GenAI-powered call summarization reduces wrap-up time, improves documentation accuracy, and accelerates onboarding for new agents—freeing up staff to focus on higher-value interactions and improving the overall customer experience.

- Welcome and Introductions
- Intro in GenAI Summarization
- How to Prepare for Your GenAI Implementation
- Q&A
- Closing and Key Takeaways

Presentation Team

CalSAWS Special Agent

MIKE TOMBAKIAN

Code Name: Maroon Confidentiality
Ops Specialist

Assignment:

Contact Center Technology Manager

Specialties:

**Contact Center, Gen AI, Child
Welfare, Application Security**

Current Location:

Undisclosed, CA

Random fact:

**My first IT job was to fix my
teachers computer in 6th grade.**



Lead Agent

CalSAWS Special Agent

ROBERT LUSK

Code Name: Crimson KinGap Jedi

Assignment:

Technical and Operations Director

Specialties:

**Technical ProdOps, Contact Center &
Self-Service, and TechOps Security**

Current Location:

Undisclosed, CA

Random fact:

**Ridden Harley from Key West to
Sacramento and San Diego to British
Columbia**



Our Top Agents

Panel Members

CalsAWS Special Agent

**ANDI
CLAMAN**

Code Name: Olive Security Falcon

Assignment:
GenAI Consultant

Specialties:
**GenAI Design, Testing,
Implementation, and Maintenance**

Current Location:
Undisclosed, USA

Random Fact:
Certified yoga teacher!



County Special Agent

**NOU
YANG**

Code Name: Turquoise OCAT Falcon

Assignment:
Contact Center Manager

Specialties:
**Eligibility Services, Operations,
Data Analytics**

Current Location:
Undisclosed, USA

Random Fact:
Weekend Autocrosser



Our Top Agents



Mission:
Possible

GenAI Call Summary Assist

Intro to GenAI Call Summary Assist

Benefits of the Solution



The GenAI Call Summary Assist solution streamlines the post-call summarization process for Contact Center eligibility by automatically generating and populating a draft of the call summary on the Call Log Detail page. The eligibility workers can review and modify the GenAI generated summaries before saving them to the system.

CalSAWS Objective 2: Streamline Administrative Processes



Reduced Average Wrap Time and Handle Time

Increased Call Summary Consistency

- ✓ Allows for increased productivity throughout the day in other areas
- ✓ Automation allows for thorough summaries capturing pertinent call details

CalSAWS Objective 3: Enhance User Experience & Support



Better Experience for County Workers

Improved Service to Customers

- ✓ More time spent on higher value tasks
- ✓ Shorten learning curve for new employees
- ✓ Enables more active listening
- ✓ Increased engagement with customers

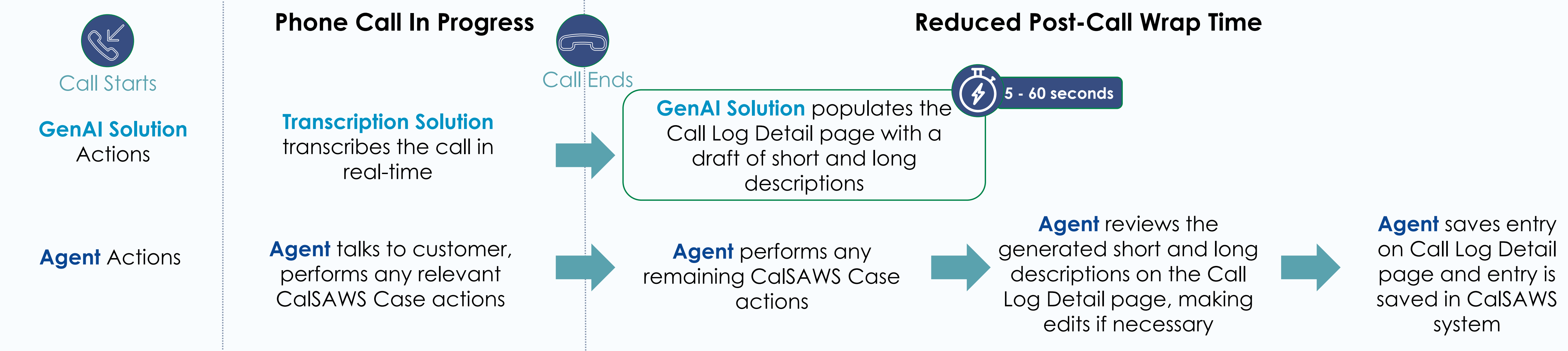
English and Spanish Solution Overview

GenAI Call Summary Assist

Call flow prior to GenAI



Call flow with GenAI





Video Message

GenAI Demonstration

The logo features the words "Mission:" and "Possible" in a stylized font, with "Mission:" in black and "Possible" in a teal color. The text is set against a circular background with a radial gradient and a wavy teal border.

Mission:
Possible

How to Prepare for Your GenAI Implementation

How We Got Here

GenAI Call Summary Assist



Fresno's Story



Leveraging
Generative AI



Journaling and
Post Call Summarization

Preparation Considerations

GenAI Call Summary Assist

1

Staff Engagement and Training

- **Communications**
 - County Business Process and Decisions
- **Identify Key Staff to participate in the implementation process**
 - GenAI Summarization Subject Matter Expert (SME)
 - County Trainers
 - User Acceptance Testing (UAT) Participants (multilingual where applicable)



Preparation Considerations

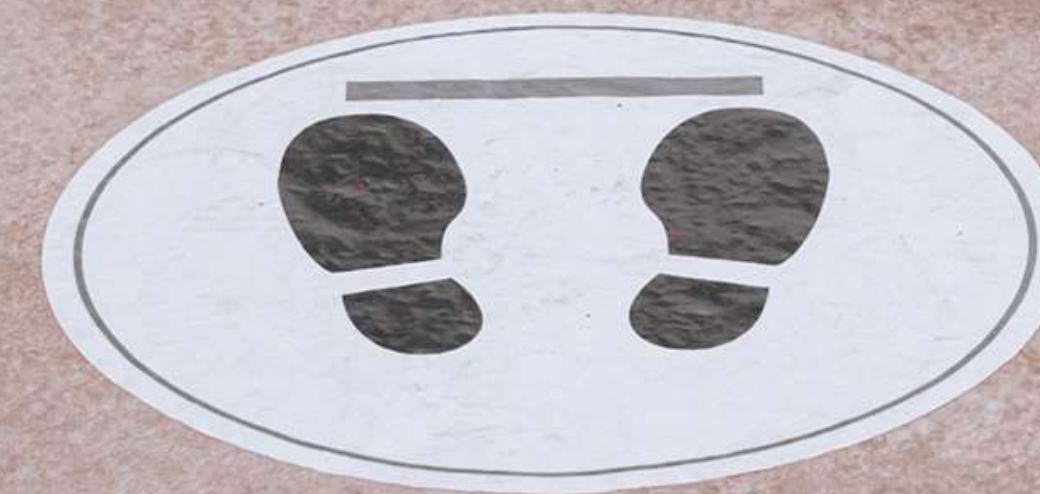
GenAI Call Summary Assist

2

Queue Selection

Our recommendation is for a multi-phased deployment:

- Rolling out GenAI summarization in phases allows us to minimize risk and closely monitor performance.
 - Phase 1: Deploy to an English call queue
 - Minimizing Risk and Performance Monitoring
 - Phase 2: Expand to the rest of the queues and supported languages



Preparation Considerations

3

GenAI Call Summary Assist

Dictionary Updates

- An Editable Custom Vocabulary File allows us to upload words and pronunciations as needed to improve transcription of words
 - Place names may not automatically match English phonetics, so we use the dictionary file to enhance the model's ability to capture words correctly
 - Without updates “Fresno” might be transcribed as “freeze no”, or “Medi-Cal” as “medi cow” or “medical”
 - Think about the place names that are commonly spoken in your county.



Preparation Considerations

GenAI Call Summary Assist

4



Stakeholder Engagement

- Labor groups
- Agents / Supervisors
- Helpdesk / Support team



Preparation Considerations

5

GenAI Call Summary Assist

Develop a Best Practices Document

Examples:

- Reminders
 - *Please do not remove brackets in summary*
- Encouraged summary edits
 - *Please correct spelling of name, if applicable*



Preparation Considerations

GenAI Call Summary Assist

6



County Changes and their Impacts

Examples:

- First Contact Resolution
- Staffing

Helpful metrics for monitoring:

- Average Wrap Time
- Average Handle Time
- Summary Generation Time



Key Metrics From Most Recent Deployment

Fresno English Queues



Key Performance Metrics 6/28/24 to 5/30/25		
281K+ Summaries Generated	100% Summaries Generated Within 60 Seconds	9 seconds Average Call End to Summary End

Post Go-Live Jun 2024 - Oct 2024	
4% Average Wrap Time Savings	5% Average Handle Time Savings

Post Business Process Change Nov 2024 - May 2025	
+12% Average Wrap Time Increase	+7% Average Handle Time Increase

Key Metrics From Most Recent Deployment

Fresno Spanish Queues



Key Performance Metrics 2/28/25 to 5/30/25		
11K+	100%	10 seconds
Summaries Generated	Summaries Generated Within 60 Seconds	Average Call End to Summary End

Post Go-Live	
26%	18%
Average Wrap Time Savings	Average Handle Time Savings

In-depth Discussions and Requests

Regional Managers are your first source

- Please direct County-specific questions to your Regional Managers:
 - Implementation Effort
 - Implementation Timelines
 - Implementation and M&O Costs
 - Priorities





Gen AI Call Summary Prep and Tools

Panel Discussion and Questions

Panel Members

Our Top Agents



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Next Steps

- **What can I do now?**

- Download the **GenAI Checklist and Best Practices document** from www.CalSAWS.org
- Start identifying queues
- Communication plan
- Identify County Trainers and SMEs
- Keep an eye out for the upcoming CalSAWS Request for Information (CRFI)



Enjoy Your Evening!

See you tomorrow morning!

