Project Steering Committee Meeting
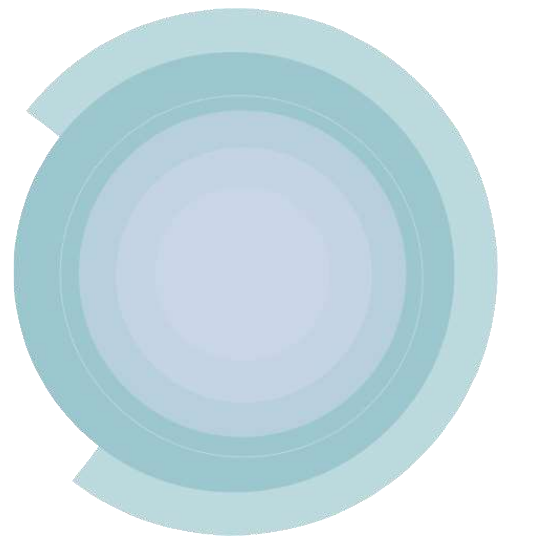
July 17, 2025

CalSAWS

Agenda

1. Call Meeting to Order.

2. Confirmation of Quorum and Agenda Review.

3. Public Comment: Public opportunity to speak on any item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

   Note: The public may also speak on any Item ON the Agenda by waiting until that item is read, then requesting recognition from the Chair to speak.

Action Items
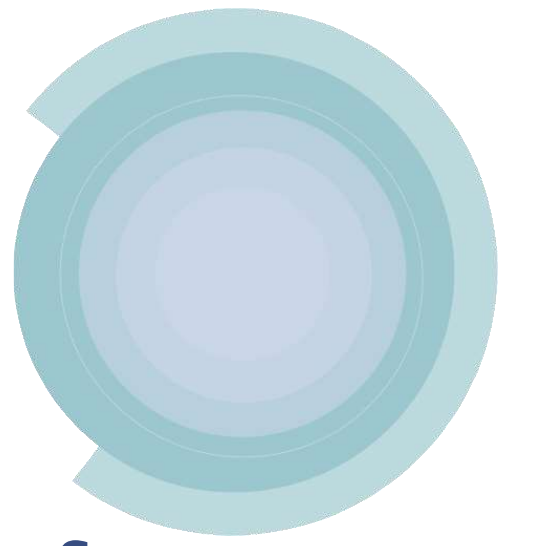
4. Approval of the Minutes and review of the Action Items from the June 27, 2025 PSC Meeting.

Informational Items

CalSAWS Conference Debrief

Overall Experience

The conference duration (day and a half) provided the right amount of time to cover topics.

4.1

The conference was well-organized.

4.3

The conference had the right balance of sessions and free time.

4.2

There were the right number of plenary sessions.

4.0

there were the right number of breakout sessions.

3.9

Overall, the conference was a valuable experience.

4.3

Strongly disagree   **Strongly agree**

91

Plenary #1

Plenary Session #1 - CalSAWS Priorities and Objectives

The plenary session was appropriate in duration.

4.0

The plenary session was relevant and engaging.

4.0

The plenary session presenter was knowledgeable about the topic, and I felt I learned something new.

4.0

Strongly disagree   **Strongly agree**

60

Plenary #2

Plenary Session #2 - GenAI Call Summary Prep and Tool

The plenary session was appropriate in duration.

4.3

The plenary session was relevant and engaging.

4.1

The plenary session presenters and panel members were knowledgeable about their topic, and I felt I learned something new.

4.1

Strongly disagree

Strongly agree

52

Plenary Session #3 - Collaboration Model Redesign

The plenary session was appropriate in duration.

4.1

The plenary session was relevant and engaging.

3.8

The plenary session presenters and panel members were knowledgeable about their topic, and I felt I learned something new.

3.9

Strongly disagree   **Strongly agree**

47

Breakout Session #1

Breakout Session 1 - Harnessing Analytics for Better Decisions

The plenary session was appropriate in duration.

4.0

The plenary session was relevant and engaging.

3.9

The plenary session presenters and panel members were knowledgeable about their topic, and I felt I learned something new.

3.9

Strongly disagree   **Strongly agree**

45

Breakout Session #2

Breakout Session 2 - Using Gamification to Improve Contact Cente

The plenary session was appropriate in duration.

4.1

The plenary session was relevant and engaging.

3.7

The plenary session presenters and panel members were knowledgeable about their topic, and I felt I learned something new.

3.8

Strongly disagree

Strongly agree

44

Breakout Session #3 - Cracking the Code on Return Mail

The plenary session was appropriate in duration.

4.5

The plenary session was relevant and engaging.

4.5

The plenary session presenters and panel members were knowledgeable about their topic, and I felt I learned something new.

4.5

Strongly disagree

Strongly agree

43

Breakout Session #4 - Networking with a Mission

The plenary session was appropriate in duration.

3.7

The plenary session was relevant and engaging.

3.0

The plenary session presenters and panel members were knowledgeable about their topic, and I felt I learned something new.

3.1

Strongly disagree   **Strongly agree**

42

Favorite Part of the Conference

The BCR Song

Gamification
(Breakout 2)

Collaboration Model
Reminds us of community focus and impact

CalSAWS Priorities and Objectives
was very informative

GenAI and Call Center Functionality demo

Return Mail
(Breakout 3)

Analytics Session
(Breakout 1)

Networking Session
Time to network with colleagues
Meeting new people

Working our county CBOs and advocates to bridge the gaps to better serve our customers.

Plenary Panels

Keynote Speakers
connected the why of what we do and how things are done

Location and length of sessions

All was very interesting. Enjoyed the conference as a whole.

I felt the conference was well organized and gave us as attendees the right amount of information to take back to our counties.

Meaty Topics

Great Theme and Location

How Can We Improve?

Slides were hard to read

Better chairs

Add an additional day

BenefitsCal User Experience Focus

Better organized and have handouts

I wish I could have attended every session. Don't want to have to choose.

Add a fun mixer thing (like an evening at the bar, so I know where the cool kids will be)

More sessions
More breakout sessions
More detailed sessions
(county practices)

Just need 2 plenary sessions (1 per day). More time for breakout sessions.

Code name challenge was overwhelming… Loved fun facts on the name tags.

Create Fraud Prevention and Detection
as a breakout session by harnessing AI capabilities of CalSAWS

Plenary Session 2 was repetitive of CWDA Conference and other meetings

This was great as it was.
Keep up the good work!
All good!
I cannot think of anything at this time.

January 2026 JPA Member Representatives Meeting

January 29, 2026 | Zoom and CalSAWS Office, Gold River, CA

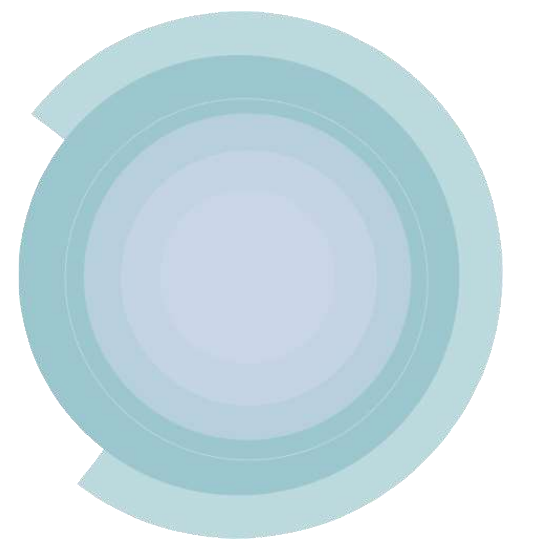# June 2026 Conference and JPA Member Representatives Meeting

June 25-26, 2026 | San Francisco, CA

BenefitsCal Document Upload Research Update

BenefitsCal Document Upload Research Update

## Concerns and Findings

Delayed Document Availability

- Documents uploaded during the eApplication process are not viewable by workers until the application is submitted.
    - Customers may mistakenly believe documents are already submitted, leading to incomplete applications.

Lost or Misplaced Documents Resulting in Additional Requests for Documents

- Unsubmitted applications prevent documents from being uploaded and attaching to a case.
    - Potential BenefitsCal enhancement to provide clear disclaimer

- Some workers are unaware that uploaded documents are accessible on the eApplication page or where to find them once linked to a case.
    - "Point of Service" allows users to see the BenefitsCal documents submitted within the past 90 days.
    - Additional Trainings and training resources may improve awareness among workers.

- Documents may have been submitted but do not meet eligibility requirements, requiring workers to request additional documentation or further clarification.

BenefitsCal Document Upload Research Update
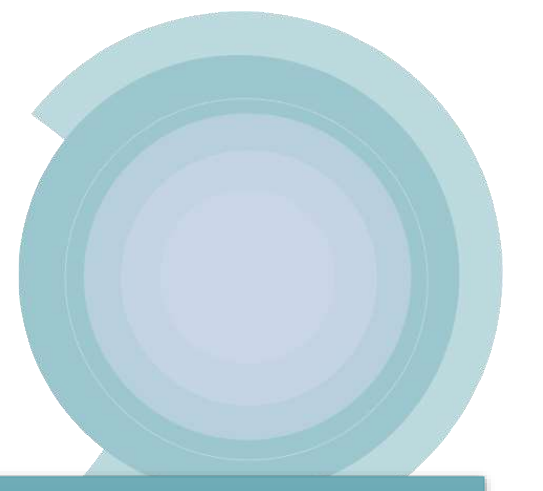
Ongoing Steps

Coordination and Follow-up

- Examples received from Advocate co-leads continue to be investigated and results are being shared.
  - Five cases sent in early June
  - Two cases sent in mid June*

- Additional examples have been requested from the Advocate co-leads to continue to research this item.
  - One case sent in early July (research ongoing)

- County Learning Exchange (CLE) may provide user-focused training based on identified confusion or workflow gaps (August CLE topic: BenefitsCal – in planning stages).

Training and Communication

- CalSAWS Learning Exchange sessions held on June 3 and 5, focused on Imaging
  - Recorded and available for counties.

- Monthly Enhanced Imaging Communications include:
  - Training videos, Quick Reference Guides, Tips and updated materials on system enhancements.
- Two Quick Guides currently in internal review – one worker facing, one public facing

Potential System Enhancements

- BenefitsCal enhancement - Add disclaimer clearly informing users that documents are not uploaded until the application is submitted.

- CalSAWS enhancement - Add "BenefitsCal Images" button to Case Summary page.
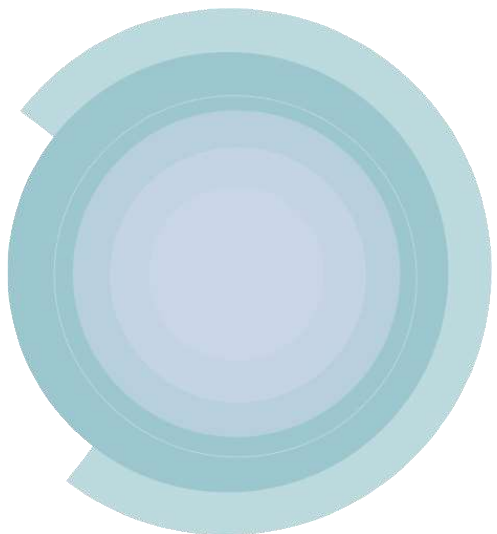
Note: No SCRs are currently documented at this time.

*an additional 7 cases were sent in mid June related to Two-Way Messaging

BenefitsCal Update

GetCalFresh Sunset & Support

Ensuring Seamless Service Closure and Providing Ongoing Assistance for Beneficiaries and Stakeholders

| 2023 | 2024 | 2025-Q1 | 2025-Q2 | 2025-Q3 |

May – June 2025
Support for CDSS Outreach efforts

✓ Reviewed resources and supported communications
✓ Supported County Readiness
✓ Supported CBO Readiness

July 2025 Onward
Support and Monitor

✓ Track Applications on BenefitsCal
✓ Review Customer Surveys

January 2023 – April 2025
BenefitsCal Enhancements to Support GCF Sunset is *Complete*.
Benefits collaborated with CDSS to complete **34** system enhancements

April 24, 2025
Systematic changes complete.

June 30, 2025
GetCalFresh Sunset: GCF customers submit applications via BenefitsCal.
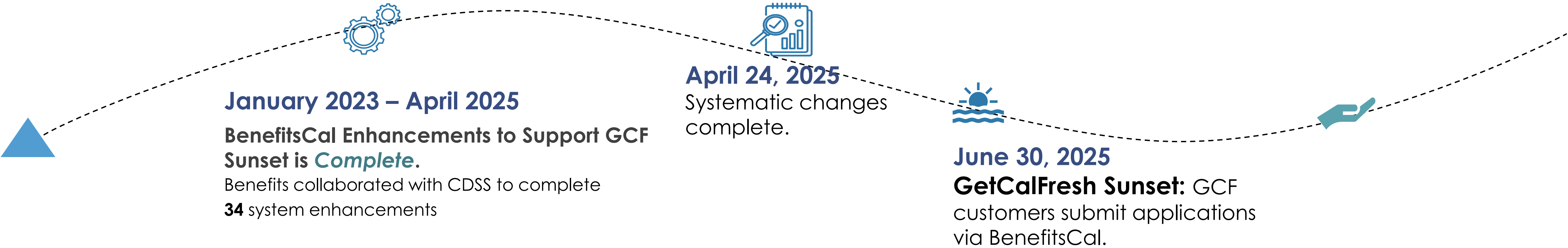
BenefitsCal Public Facing Enhancements

2025 Q-3 Public Facing Feature Updates

July Release 25.07

- **Document Upload Tooltip:** Modify the help text to inform users of the 8MB document upload size limit.
- **Customer Dashboard**: Reorder linked cases by case recency, simplify case view.
- **Periodic Report (SAR7):** Display family size, current income, and IRT.

September Release 25.09

- **Student Exemption for LPIE:** Modify the student exemption options to include the LPIE exemption during application.
- **CBO Experience**: Changes to account creation to clearly identify the difference between a CBO and customer.
- **Medi-Cal SSApp**: Simplify Medi-Cal apps by aligning to recommended policy changes for Single Streamlined Application.

August Release 25.08

- **Pronoun Continuity:** Display gender neutral pronouns throughout BenefitsCal.
- **Demographics Selections:** Reorder the "I prefer not to answer" selection as the last option on demographic questions.
- **Errors Display:** Auto-scroll the user to the error message when an error displays.

Application Completion and Page Exit Rate

Customer | Completed within 7 Days | Q1 (Jan-Mar 2025)
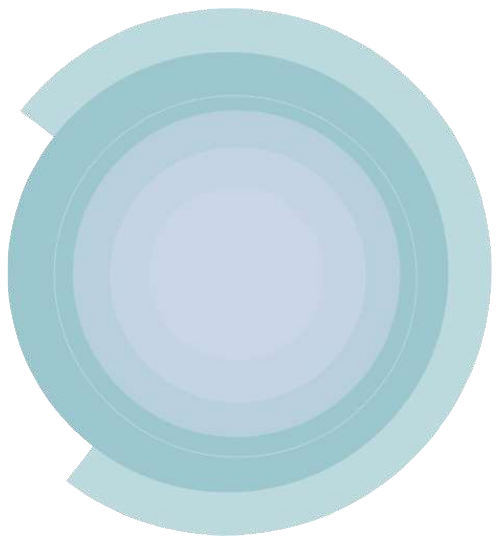
In Q1, from Jan-March 2025,

328K

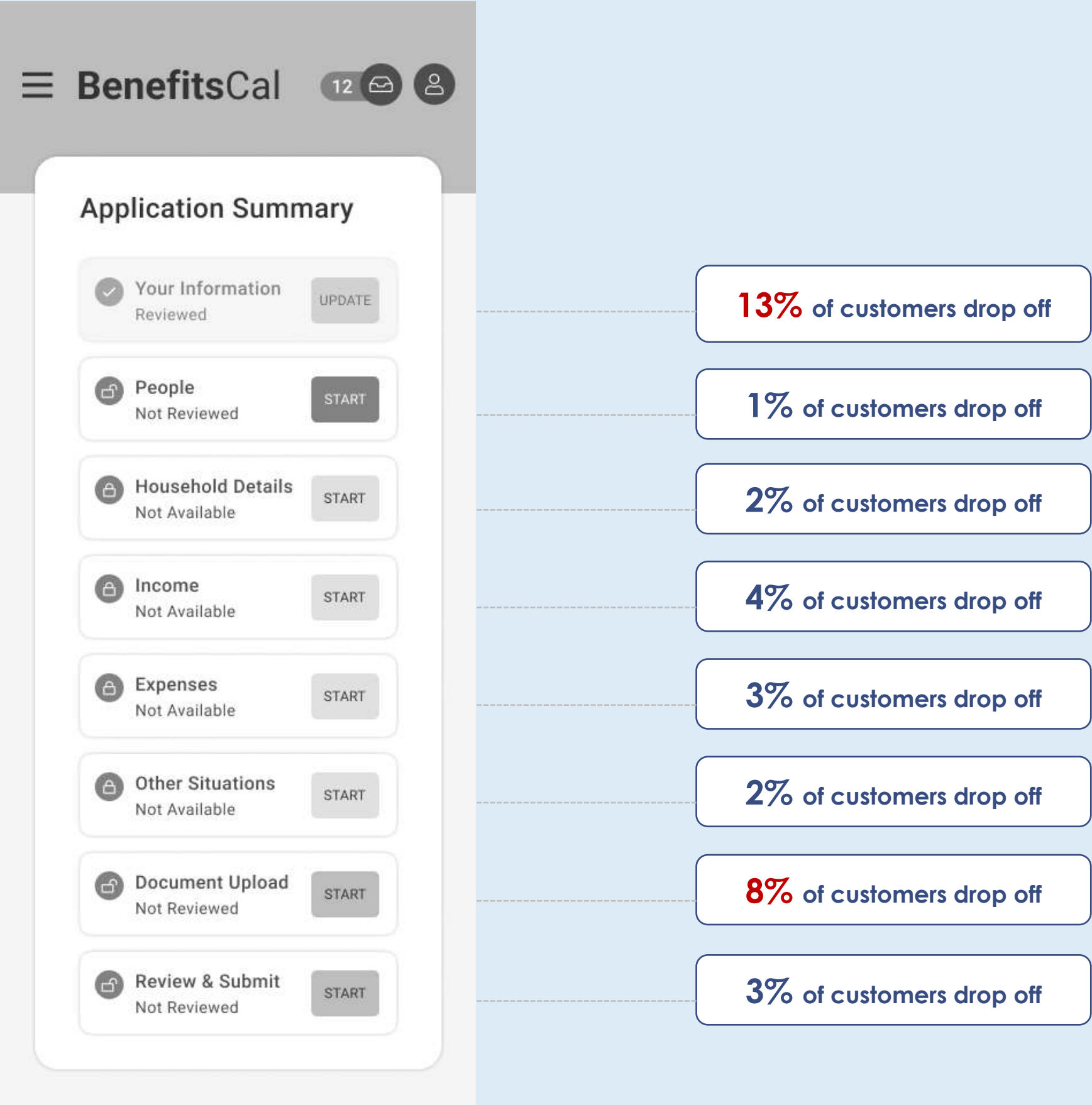customers **started** new BenefitsCal applications.

In 7 days	In 30 days
64%	**68%**

of these applications were **completed.**

In 7 days	In 30 days
36%	**32%**

Of all new BenefitsCal customer applications result in drop-offs.

Where in the BenefitsCal application do customers tend to drop off?

BenefitsCal 12

Application Summary

- **Your Information** Reviewed — UPDATE → **13%** of customers drop off
- **People** Not Reviewed — START → **1%** of customers drop off
- **Household Details** Not Available — START → **2%** of customers drop off
- **Income** Not Available — START → **4%** of customers drop off
- **Expenses** Not Available — START → **3%** of customers drop off
- **Other Situations** Not Available — START → **2%** of customers drop off
- **Document Upload** Not Reviewed — START → **8%** of customers drop off
- **Review & Submit** Not Reviewed — START → **3%** of customers drop off

Most page exits occur in the **Your Information** section and **Document Upload** section.

Your Information – Section Drop-Offs Drilldown

Customer | Completed within 7 Days | Q1 (Jan-Mar 2025)
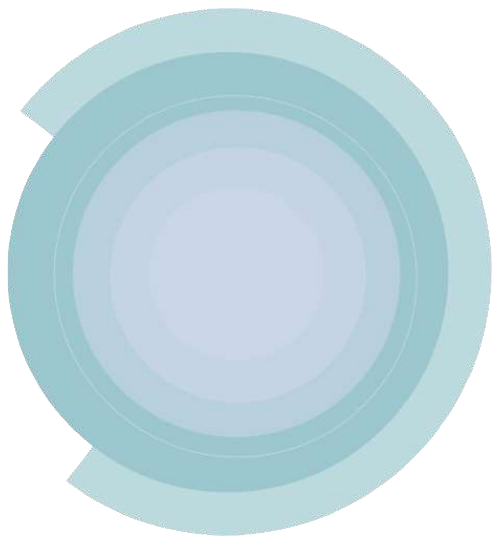
39K or **13%**

of all new BenefitsCal customers drop off at the **Your Information** section.

Impacted Cohort:

- Customers belonging to 40–50 age group

- Customers with more than 3 household members

Where in the Your Information section do customers tend to drop off?

BenefitsCal
Your Information

Out of 39k customers,

🔒 Preferred Language	**15%** of customers drop off
🔒 Your Name	**23%** of customers drop off
🔒 Disability	**3%** of customers drop off
🔒 Your Address	**13%** of customers drop off
🔒 Program Selection	**23%** of customers drop off
🔒 Your Contact Information	**5%** of customers drop off
🔒 Contact Preference	**2%** of customers drop off
🔒 Date of Birth	**9%** of customers drop off
🔒 Social Security Number	**2%** of customers drop off
🔒 Marital Status	**0%** of customers drop off
🔒 US Citizen Status	**2%** of customers drop off
🔒 Sexual Orientation/Gender Identity (SOGI)	**0%** of customers drop off
🔒 Hispanic/Latino/Spanish Ethnic Origin	**0%** of customers drop off
🔒 Race/Ethnic Origin	**2%** of customers drop off

Most page exits occur in **Preferred Language, Name, Address,** and **Program Selection** pages.

Release &
Policy Updates

Release and Policy Update

System Updates

Since we last met....

- Deployed 25.05 (70 SCRs, ~34,000 hrs)
  - San Bernardino County went live with the automated GA/GR solution. The first county to be added to this solution post migration
- Deployed 25.06 (9 SCRs, ~11,000 hrs)
- Completed Case Purge
  - First run for all 58 counties
  - ~1.38M cases purged; largest run to date

- Deployed SCATL application and completed conversion from WDTIP to SCATL

Release and Policy Update

SCATL

Background:

- Post 58 county migration, it was approved to move the WDTIP TRAC data into CalSAWS. The benefits of this include:
  - Retirement of a +25-year, mainframe, COBOL system, saving the state funding each year by retiring this legacy system. System is available in read only mode through June 2026
  - Removal of an interface that required on-going reconciliation
  - Faster and easier sharing of Time on Aid records across counties, ease of use and improvements to workers regular tasks

- The initial request was a "lift and shift" of current CalSAWS/WDTIP functionality. We went on a step further:
  - New look and feel that enhances usability
  - Moving time clocks from PERS to CIN level

Release and Policy Update

SCATL
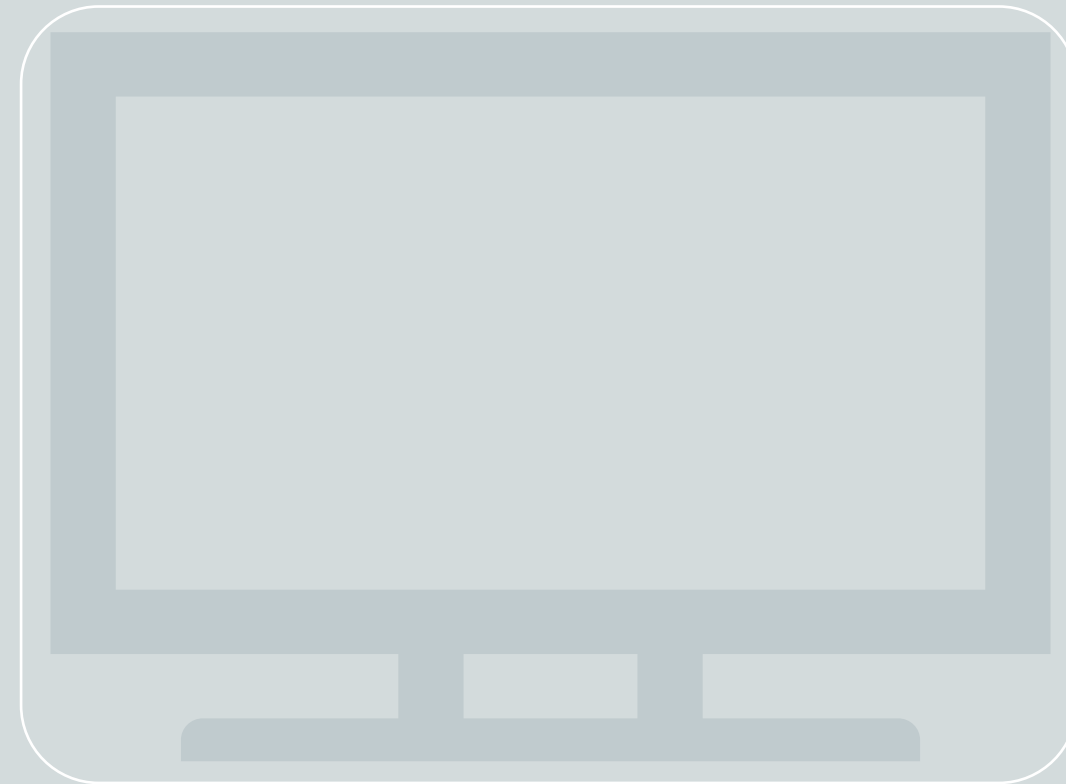
Technology

AWS Relational database

React front-end

Serverless lambdas

Real time integration with CalSAWS/EDD

Data

½ Billion records converted

Three mocks plus one successful conversion completed ahead of schedule!
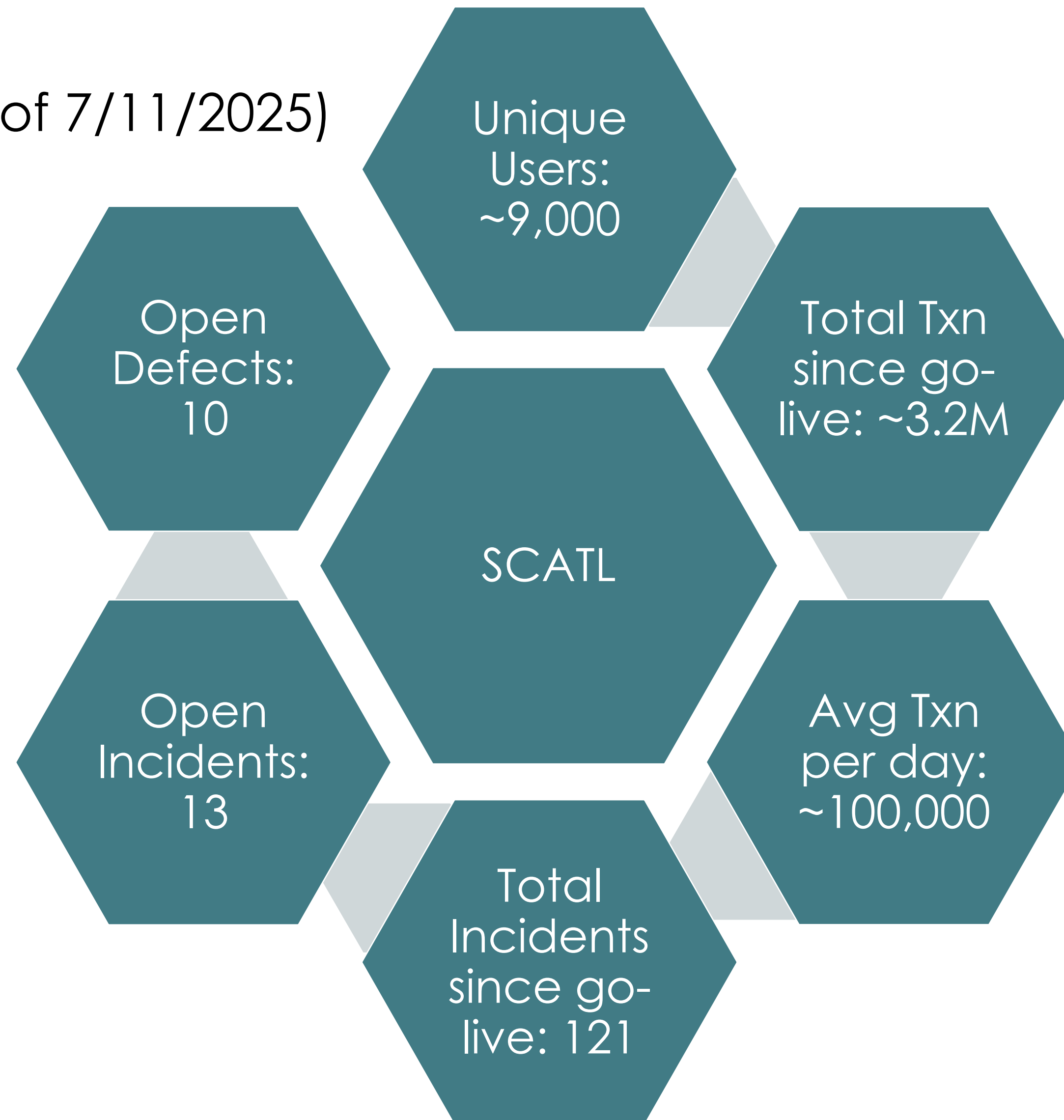
People

Simplified UI

Single sign-on

Demos, fact sheets, quick guides

Agile workgroup met every week

Release and Policy Update
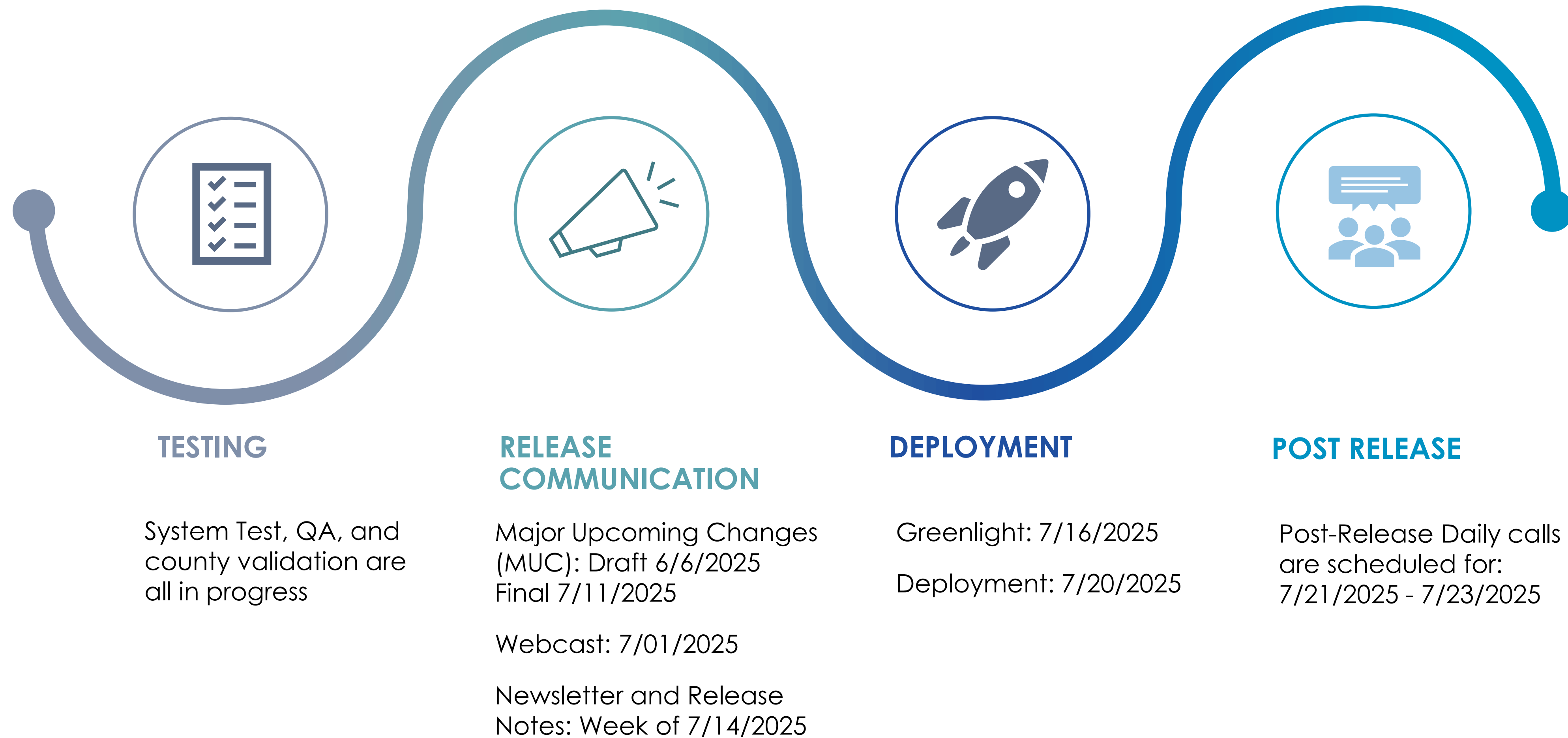SCATL

Post Go-live stats (as of 7/11/2025)

Unique Users: ~9,000

Total Txn since go-live: ~3.2M

Open Defects: 10

SCATL

Avg Txn per day: ~100,000

Open Incidents: 13

Total Incidents since go-live: 121

Release and Policy Update

Upcoming Releases

July	August	September	October
Baseline (7/21/2025) and Priority Releases	**Priority Releases**	**Baseline (9/22/2025) and Priority Releases**	**Priority Releases**

July

7/XX/2025:
- ACL 25-XX AAP, FC, KG, CNI Rate Increase for Year 2025-2026 COLA Values
- ACL 25-XX AAP, FC, KG, CNI Rate Increase for Year 2025-2026 - Batch EDBC COLA

7/21/2025:
- ACL 22-85 - CalFresh CF 296 and Expedited Service Redesign
- ACL 10-01, ACL 15-94, ACL 15-94E - CF 387 CalFresh Request for Information for Residency

August

8/XX/2025:
- 2025-2026 CalFresh COLA; Update CalWORKs (CW) IRT Levels for 2025-2026
- Update Homeless Mapping for TANF Clock as per WDTIP TRAC Guide

September

9/XX/2025:
- ACIN I-XX-25- FFY 2025-2026 CalFresh COLA; ACL 25-XX CW IRT - Run Batch EDBC
- ACL 21-45 - Add new CW and WTW Notices

9/22/2025:
- Send MEDS Non-Extended Aid Codes For Foster Care & Kin-GAP Infants
- MEDIL I 25-07 - 2025 Updates to the Single Streamlined Application
- ACL 13-96 - Add additional forms to CalSAWS CW - CF - CW/CF and ESAP RE Packets

October

10/XX/2025:
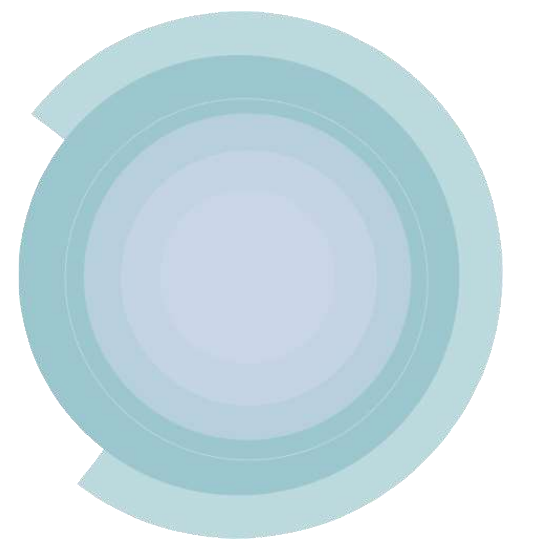- ACL 25-41 - Informational ABAWD Waiver Ending Mass Mailer

Release and Policy Update

Upcoming Releases – 25.07

TESTING

System Test, QA, and county validation are all in progress

RELEASE COMMUNICATION

Major Upcoming Changes (MUC): Draft 6/6/2025
Final 7/11/2025

Webcast: 7/01/2025

Newsletter and Release Notes: Week of 7/14/2025

DEPLOYMENT

Greenlight: 7/16/2025

Deployment: 7/20/2025

POST RELEASE

Post-Release Daily calls are scheduled for:
7/21/2025 - 7/23/2025

Release & Policy Update

ACWDL 25-13 Medi-Cal Expansion Freeze for those with Unsatisfactory Immigration Status
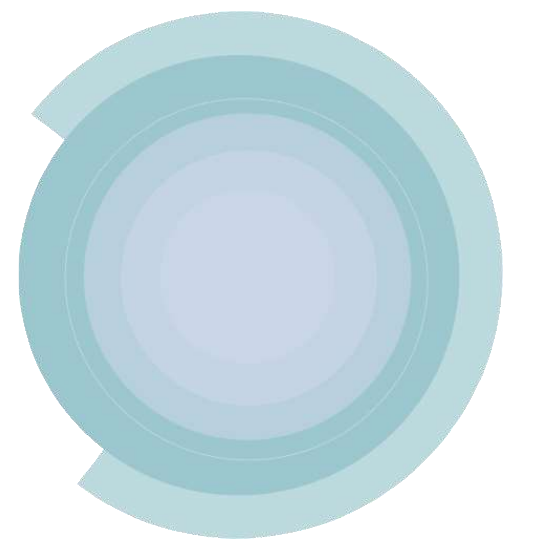
Effective January 1, 2026 – New Medi-Cal (MC) applications submitted on or after this date for individuals without satisfactory immigration status will only be eligible for restricted-scope Medi-Cal.

- **SCR 291142** will implement the necessary system changes to support this policy update. It is tentatively scheduled for a priority release on **December 22, 2025**. The Medi-Cal Committee will review and provide feedback on this SCR once the design is complete.

Release & Policy Update

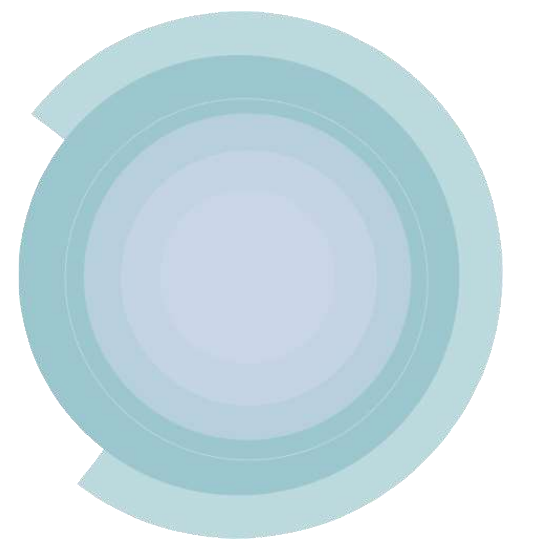ACWDL 25-14 – Reinstatement of Assets Limits for Non-MAGI Programs

Starting January 1, 2026, the asset test for all Non-MAGI programs will be reinstated, including Medicare Savings Programs and Long-Term Care. The asset limits will apply to new applicants and existing members at renewal or when eligibility is reviewed due to a change in circumstances.

- **SCR 291144** will implement the necessary system changes to support this policy update. It is tentatively scheduled for a priority release on **December 22, 2025.** The Medi-Cal Committee will review and provide feedback on this SCR once the design is complete.

Release & Policy Update

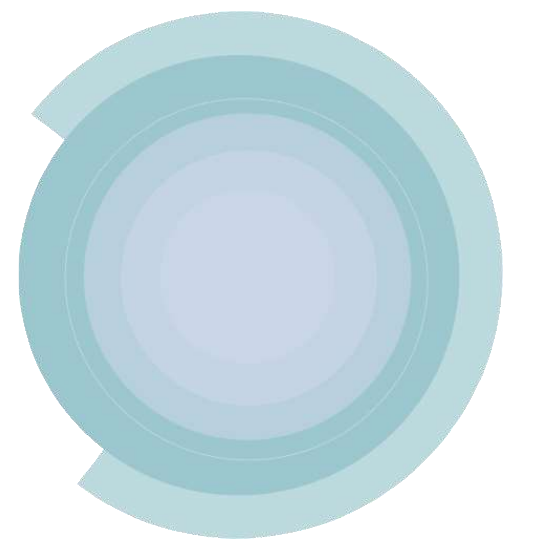ACWDL 25-14 – Reinstatement of Assets Limits for Non-MAGI Programs

Beneficiaries will be required to report asset information at their redetermination (RE). To support this, DHCS is providing updated forms. SCR 291144 will include adding the updated forms to applicable MC RE packets.

January and February 2026 RE packets are mailed in November and December 2025. DHCS is creating a new asset report form (name and number TBD) to use until the updated forms are ready for March REs and beyond. Gainwell, the Central Print vendor, will add the form to the packets before mailing.

To meet the State's timeline, the initial version of the new form will be available in English and Spanish. The GEN 1365 will be included in all packets.

Release & Policy Update

House Resolution 1 (H.R. 1): CalFresh Impacts – What We Know So Far

- Lawfully Present Non-Citizens: Changes impact eligibility and/or benefits.
- ABAWD Requirements: Expands time limits and work requirements for Able-Bodied Adults Without Dependents.
- Standard Utility Allowance (SUA)
    - ❑ Limits SUAS benefit to households with elderly and disable members only
    - ❑ Excludes the cost of basic internet service from SUA calculations.
- Thrifty Food Plan: Imposes restrictions on future updates or changes.
- CalFresh Healthy Living: Eliminates federal funding for this program.

Transition
Update

Infrastructure Transition

Recently Completed and Future Transitions

Imaging

- **Transition Complete**
- Transition of custom application components transitioned June 1, 2025
- SaaS and hosting services continue to be provided by Hyland

Contact Center

- Infrastructure transitioned February 1, 2025
- Application and remaining services transitioned July 11, 2025
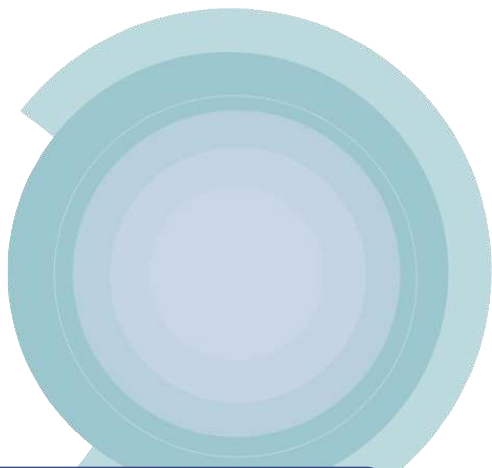- **Remaining Transition** - Call Summarization (Gen AI) on July 31, 2025

Access Mgmt

- **Transition Complete**
- Ping Identity formerly known as ForgeRock
- Infrastructure transitioned February 1, 2025
- Transition of custom application components transitioned June 2, 2025

M&E Transition-In Progress

As of 7/9/2025

Session Status

Knowledge Transfer
94%	241	14
% Complete	Total Sessions	Remaining Sessions

3	227
Completed this Month	Total Sessions Completed

KT Burndown

Job Shadowing
79%	178	38
% Complete	Total Sessions	Remaining Sessions

15	140
Completed this Month	Total Sessions Completed

JS Burndown

Reverse Job Shadowing
53%	89	42
% Complete	Total Sessions	Remaining Sessions

5	47
Completed this Month	Total Sessions Completed

RS Burndown

Release 25.09 [75% Complete]

- **JS/RJS Design & Build**: Complete (15 SCRs)
- **JS/RJS Test:** In-Progress (7/7 test script creation complete, 0/7 testing complete)

Release 25.11 and 25.11.XX

- **Release 25.11: 17 SCRs:** 6 expedited approved, 3 in approval, rest in design.
- **Release 25.12.22 (May Revise):** Design ongoing for 2 Medi-CAL/CalHEERS SCRs; policy finalized 6/30/25; 4 of 5 Risk 317 mitigation steps complete, 1 on track.

CalHEERS 26.02 and 26.06

- **Release 26.02:** JADs in progress for SCRs to finalize designs.
- **Release 26.06:** Pre-JADs in progress for SCRs to finalize requirements; scope under discussion with CalHEERS.

Other Updates

- **Architecture & Innovation:** Assessing business component improvements and innovations; Annual Strategic Plan development, including business priorities, iterative planning for strategy optimizing resources, and improving service alignment to JPA strategic objectives.
- **Security:** SSP draft in progress; 15% of control responses complete.
- **Deliverables & Policy/Legislative:** Ongoing review/submission of deliverables, SIRFRAs, SCERFRAs, CPOs, and Premise Items.

= On Schedule   = Behind less than 15 days   = Behind Greater than or = to 15 days

Monthly Performance Trends

CalSAWS SLAs
Mar 2025 – June 2025*

	Performance	
	M&E	**Infrastructure**
✓ System Availability	100%	100%
✓ Helpdesk Diagnosis	100%	100%
✓ System Response	100%	N/A
✓ Batch Completion	100%	N/A
✓ Training Environment Availability	100%	100%
✓ Standard Report Response	100%	100%
✓ Security Incident Response	100%	100%
✓ Disaster Recovery Response		100%
✓ ForgeRock	100%	100%
✓ Local Repair Services		100%

* June metrics are still be reviewed by Consortium and QA

BenefitsCal SLAs
Mar 2025 – June 2025
Deloitte

	Performance
✓ All Daily Transactions	100%

Imaging SLAs
Apr 2025 – Jun 2025
Hyland Solutions

	Performance
✓ Monthly Uptime	100%
✓ Monthly Page Views	99.36%
✓ Monthly Database Transactions	99.98%
✓ Brainware Processing	99.87%
➢ Technical Resource Response Time	1 (total)

Onshore/Offshore Metrics
SFY24-25

	Onshore %	Offshore %
BenefitsCal Hours	45%	55%
CalSAWS Hours	61%	39%

CalSAWS Cost of Rework

	Onshore %	Offshore %
R25.03	0.61%	1.81%
R25.01 - R24.11	1.23%	2.14%
Target	**≤ 10% (combined)**	

Procurement Update

Procurement Timeline
Key Procurement Tasks

	QA Procurement Event	Dates
1	RFP Development	December 11, 2024 – April 14, 2025
2	Consortium Review and Approvals	April 15 – 23, 2025
3	State Review and Approvals	April 29 – May 30, 2025
4	Federal Review and Approvals	June 4 – August 5, 2025
5	Release RFP	August 11, 2025
6	Conduct Bidder's Conference	August 19, 2025
7	Bidder Question and Answer Period	August 11 – September 2, 2025
8	Consortium Publishes Final Q&A and RFP Addendum	September 16, 2025
9	Proposals Due	October 20, 2025
10	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	October 21, 2025 – May 27, 2026
11	Prepare and Approve Vendor Selection Report	May 28 – July 1, 2026
12	Publish Notice of Intent to Award and VSR	July 2, 2026
13	Contract Negotiations	July 7 – 15, 2026
15	State Contract Approval	July 20 – August 19, 2026
16	Federal Contract Approval	August 20 – October 20, 2026
17	Contingency Period	October 21 – November 13, 2026
18	JPA BOD Approval	November 20, 2026
19	Contract Start	December 1, 2026
20	Transition-In Period (2 Months)	December 1, 2026 – January 29, 2027

State Partners Updates

State Partners Updates

Adjourn Meeting