Project Steering Committee Meeting

August 21, 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 July 17, 2025 PSC Meeting.

Informational Items

Project Delivery Office

Project Delivery Office

The Bridge Between Strategy and Delivery

PDO Team Focus

01 Enterprise-wide visibility and reporting

02 Coordination across the multi-vendor production environment

03 Risk reduction across the enterprise

04 Continuous improvement

PDO & PMO Alignment

	PMO	PDO
Purpose	• Standards and governance • Methodology and oversight • Budget/Finance	• Efficient and effective project delivery • Continuous improvement • Enterprise-wide visibility
Scope	• Program oversight • Enterprise-level reporting	• Multi-vendor enterprise coordination • Risk and issue resolution
Standards	• Project templates and standards	• Templates to gain cross-project visibility
Success Measures	• Governance compliance • Process adoption • Enterprise maturity	• Project delivery • Stakeholder satisfaction • Operational readiness

Next Steps

Two-Week Sprints

Weeks

1-2

- Team Establishment
- Project Definition

3-4

- Gap Analysis
- PDO Tool Requirements

5-6

- PDO Tool Assessment
- HR 1 Pilot Project Planning

7-8

- HR 1 Pilot Project Implementation

PDO Pilot

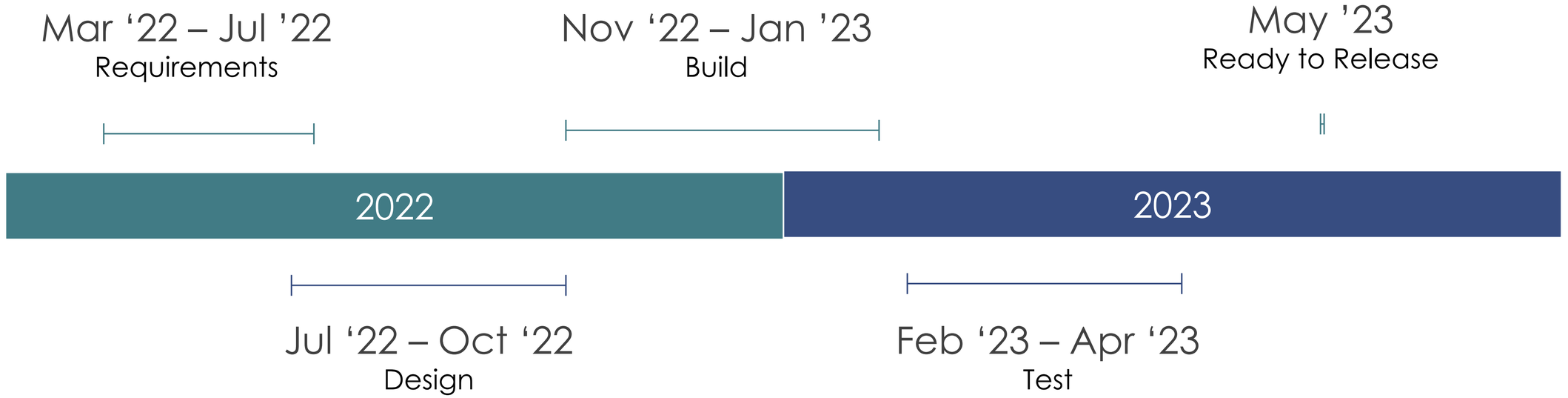
BenefitsCal Update

Release of Information - Prior Implementation and Timeline

Summary of Implementation:

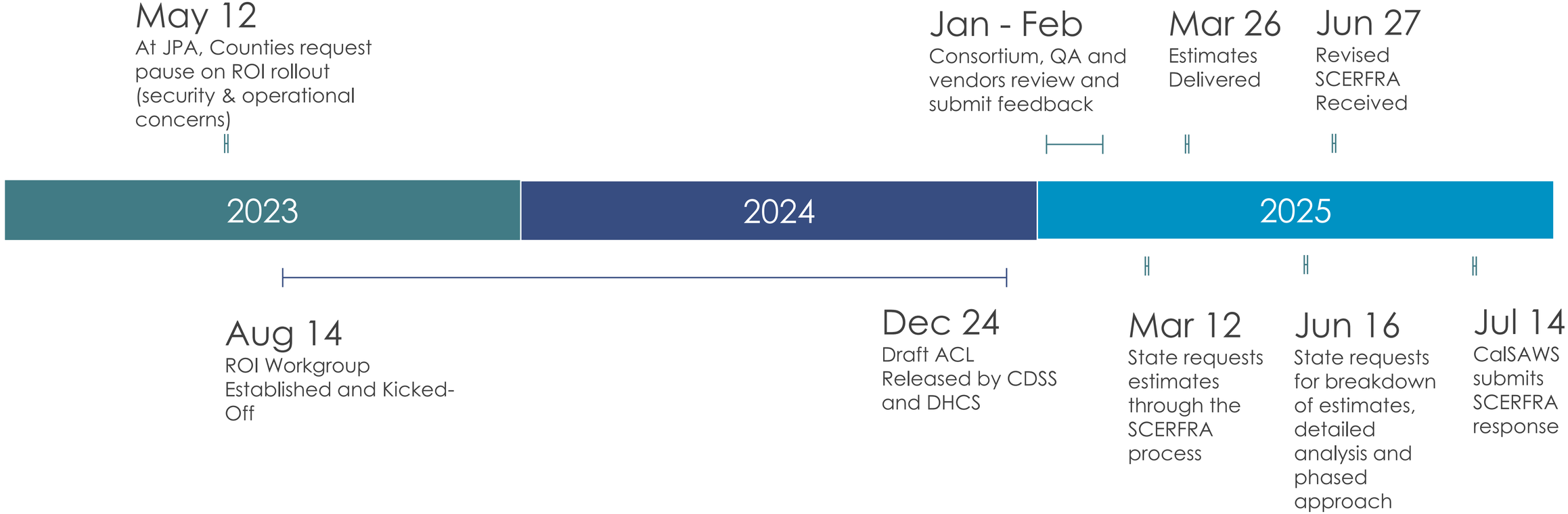
- Ability for Customers and CBOs to submit ABCDM 229s through BenefitsCal.
- Ability for Customers to view ROI details and CBOs to view customer case details released.
- Ability for Customers to revoke and manage ROIs.
- Ability for Counties to manage ROIs in CalSAWS.
- APIs to support data transfer between systems.
- Training Materials (YouTube, Help Center, Webinars, FAQs, Fact Sheets etc.)

Implementation Timeline:



Key Events

History of Release of Information Functionality



ROI Phased Implementation Plan

ROI is proposed to be implemented in four phases in consultation with State partners, Advocates and Counties.

Phase 1A

1. Refine Requirements.
2. Clean Up Existing CBOs.
3. Confirm CBO Identifiers and Structure.
4. Draft Terms & Conditions, Rights & Responsibilities.
5. Identify Communication and Training needs

~4-6 Months

Phase 1B

1. Merge Existing Code.
2. Implement T&C and R&R.
3. Update ForgeRock/Ping CBO Structure.
4. Update BenefitsCal and CalSAWS with new form.
5. Update CBO Search-ability for customers and counties.
6. Training Materials.
7. Update CBOs ability in BenefitsCal to submit ROI forms via Doc Upload.
8. Update CalSAWS to capture telephonic sign. for ROI.

~ 6 Months after Phase 1A

Phase 2

1. Update CalSAWS to capture ABCDM 229 for CBOs that do not have a BenefitsCal Account.
2. Update CalSAWS to nudge and search for pending ROIs at the time of renewals, re-applications and for ESAP households.

~3 Months after Phase 1B

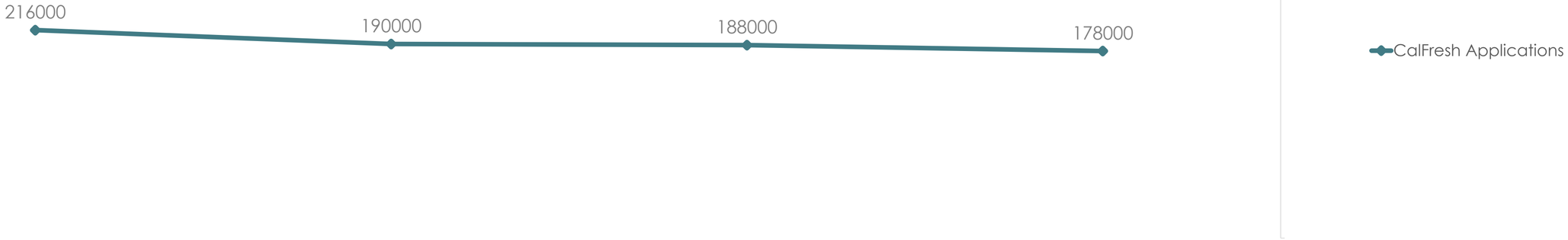
Phase 3

1. Update BenefitsCal to allow CBOs to opt in and out of ROI functionality.
2. Expand ROI to all employees of the CBO.
3. Display termination reasons on CBO and Customer dashboard

~4 Months after Phase 2

GetCalFresh Sunset & Support

Seamless Service Closure and Provide Ongoing Assistance for Beneficiaries and Stakeholders



April | May | June | July | Onwards

Prior to Sunset

GetCalFresh Applications passed to BenefitsCal CalFresh using a CBO Account

GetCalFresh Sunset

After Sunset

GetCalFresh Redirects Customers to BenefitsCal

Future Tracking

- Continue to Monitor Applications.
- Track re-directed customers through referral URL
- Analyze Customer Journey Maps

BenefitsCal Public Facing Enhancements

2025 Q-3/Q-4 Public Facing Feature Updates

August Release 25.08

- **Medi-Cal Renewal No Info on File:** Update the language on Medi-Cal renewal flow if no information is on file for it to be clear and concise.
- **Errors Display:** Auto-scroll the user to the error message when an error displays.
- ***Suggested Citizenship Document Type:** Remove the suggested citizenship/immigration document type when uploading a document in any applicable flows (i.e., Apply for Benefits).

(* Already Delivered)

September Release 25.09

- **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.
- **Document Upload:** Consolidate document upload functionality for a consistent customer experience across the application.

October Release 25.10

- **Student Exemption for LPIE:** Modify the student exemption options to include the LPIE exemption during application.
- **Medi-Cal Renewal Shelter Expense:** Remove the shelter expense collection on Medi-Cal renewal flow.
- **Account Creation OTP:** Modify the account creation flow to reduce the number of OTPs a customer receives.

Release & Policy Updates

Release and Policy Update

Upcoming Releases

August
Priority Releases

8/09/2025:
- ACL 25-49 – AAP CNI Rate Increase for Year 2025-2026 - Batch EDBC COLA
- ACL 25-45 FC, KG CNI Rate Increase for Year 2025-2026 - Batch EDBC COLA

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
Baseline (9/22/2025) and Priority Releases

9/XX/2025:
- ACIN I-XX-25- FFY 2025-2026 CalFresh COLA; ACL 25-XX CW IRT - Run Batch EDBC

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 forms to CalSAWS CW - CF - CW/CF and ESAP RE Packets.

October
Priority Releases

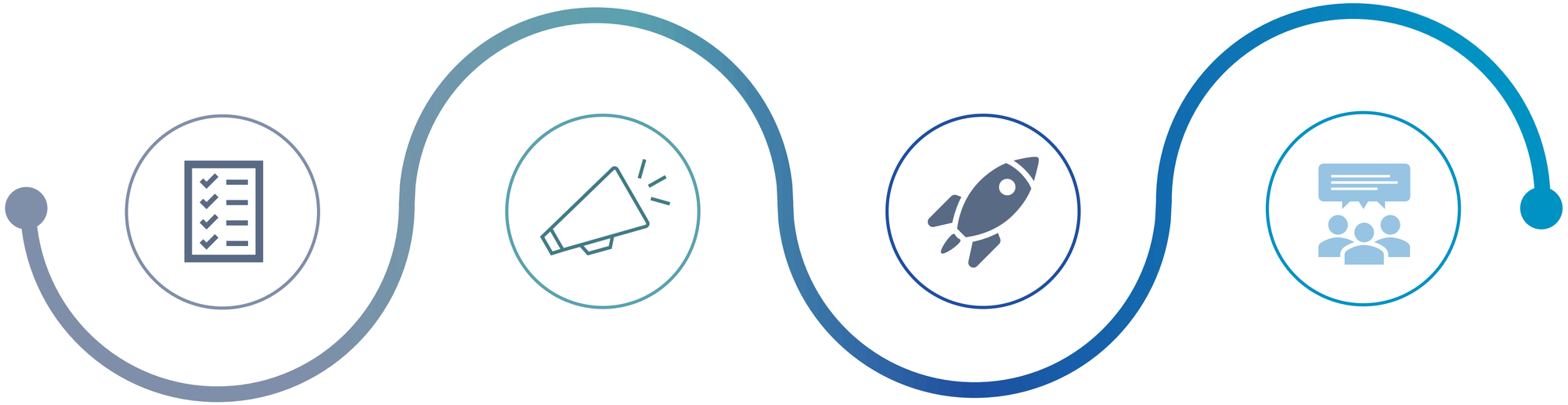
10/XX/2025:
- ACL 25-41 - Informational ABAWD Waiver Ending Mass Mailer

November
Baseline (11/24/2025) and Priority Releases

11/24/2025:
- SB 600 - ACL 25-01 - CalFresh Minimum Benefit Adequacy Act of 2023
- 2026 Social Security Title II and Title XVI Cost of Living Adjustments (SSA COLA)
- WIC 11203(a) - Apply SSP Only OPA for Specific Programs
- ACWDL 18-02E - Update ICT Document Category Type to Include MC RE Packets
- ACL 25-XX - Resource Limit Increase for CW/RCA

Release and Policy Update

Upcoming Releases – 25.09



TESTING

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

RELEASE COMMUNICATION

Major Upcoming Changes (MUC): Draft 8/6/2025
Final 8/28/2025

Webcast: 9/02/2025

Newsletter and Release Notes: Week of 9/15/2025

DEPLOYMENT

Greenlight: 9/17/2025

Deployment: 9/21/2025

POST RELEASE

Post-Release Daily calls are scheduled for:
9/22/2025 - 9/24/2025

HR 1 Introduction

HR 1, signed into law on July 4, 2025, makes major changes to Medi-Cal (MC) and updates policies for the Affordable Care Act marketplaces and the Supplemental Nutrition Assistance Program (SNAP).

As it relates to CalSAWS, here's what we know as of 8/12/2025:

- **CalFresh:**
  - Policy effective dates are not yet set
  - Policy letters are pending
- **Medi-Cal:**
  - Policy letters are pending
  - DHCS, CalHEERS, CalSAWS and CWDA are developing strategies to reduce county/system impacts for changes effective January 1, 2027; therefore, some changes may be delivered across multiple releases ahead of the January 2027 effective date.
- **Workgroups:**
  - Recruiting a workgroup to design and review Medi-Cal changes
  - A CalFresh workgroup may be formed once more details are known

May Revise & HR 1Policy Roadmap*

Dec 22, 2025 (12.22.25)

- **CA-291144/CSPM-80312** - ACWDL 25-14: Reinstatement of Asset Limits for Non-MAGI Programs
- **CA-291142** - ACWDL 25-13: Medi-Cal Expansion Freeze for those with Unsatisfactory Immigration

Policy effective 1/1/2026

Sep 21, 2026 (26.09)

- **CA-293020** - Redefine Qualified Non-Citizen Definition

Policy effective 10/1/2026

Nov 23, 2026 (26.11)

- **CA-286076** - ACWDL 25-06 Update Medi-Cal Members Address
- **CA-292586/CSPM-80928** - Work Requirements for Individuals in MAGI New Adult Group
- **CA-292582/CSPM-80929** - Semi-Annual Redeterminations for MAGI New Adult Group
- **CA-293006** - Deceased Member Verification

Policy effective 1/1/2027

Nov 23, 2026 (26.11)

- **CA-292997/CSPM-80930** Retroactive Medi-Cal Reduced Timeframes
- **CA-291157** - ACWDL 25-XX: Monthly premium for individuals with Unsatisfactory Immigration Status Receiving full scope Medi-Cal Benefits

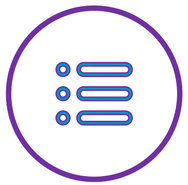
Policy effective 1/1/2027

Target releases are subject to change.

May Revise & HR 1Policy Roadmap*

Jul 24, 2028 (28.07)

- **CA-293433** - Cost Sharing for Expansion Adults



Nov 19, 2029 (29.11)

- **CA-293024** - National Federal Address Database for Address Verification

TBD

- **CA-292686/CSPM-80927** - Non-Citizen Eligibility Updates
- **CA-292684** - Limit the Standard Utility Allowance Subsidy
- **CA-292683/CSPM-80744** - Changes to ABAWD Exemptions and Expiration of Statewide Waiver

Target releases are subject to change.

May Revise & HR 1Policy Roadmap

January 2026 Medi-Cal Updates — Coordinating Outreach with State Partners

DHCS and CalSAWS are planning to hold the following sessions for the DHCS County Workgroup:

- Tentatively planned for October 2025: a refresher on property policy and entering of property on data collection pages in CalSAWS.

- Tentatively planned for November/December 2025: Overview of the policy, a refresher on CalSAWS immigration data collection pages, with a December follow-up to review functionality changes.

May Revise & HR 1Policy Roadmap
January 2026 Medi-Cal Updates

As the MC changes effective January 1, 2026, are being delivered as a priority, county validation will not be part of this effort. Below is the testing plan we've prepared to ensure these changes are implemented accurately:

- System test conducted by vendors, three consortium testers, and Quality Assurance staff
- Execute system test scripts and perform integrated testing with CalHEERS and BenefitsCal

How can counties stay engaged and informed?

- Counties can submit testing suggestions for SCRs CA-291366 and CA-291142 to their regional managers by November 14, 2025.
- Counties can track testing progress by viewing the SCR and the associated test cycles in JIRA.

Transition Update

Infrastructure Transition

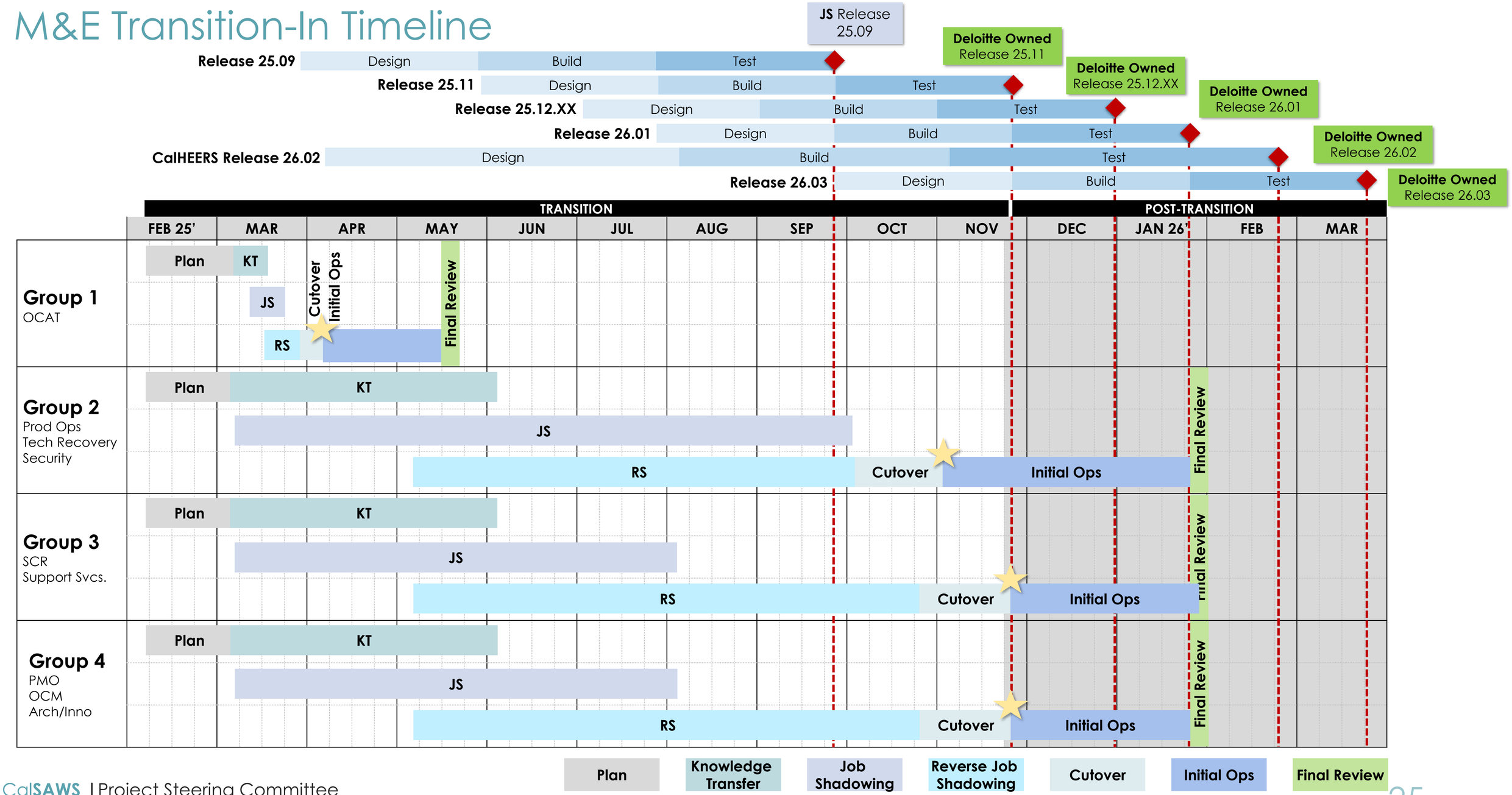
Recently Completed Transitions

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

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

- **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 Timeline



M&E Transition Cutover Progress and Status

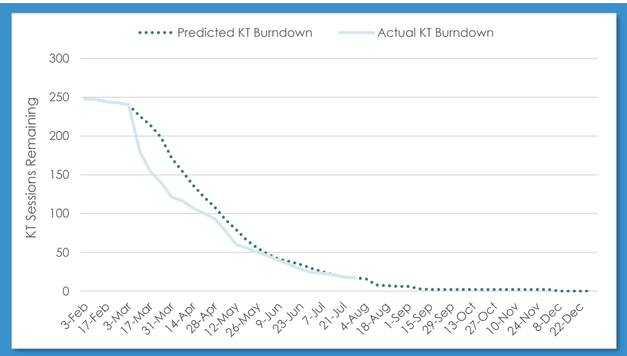
As of: 8/8/2025

M&E Transition Progress

Knowledge Transfer

% Complete	Total Sessions	Remaining Sessions
97%	249	8

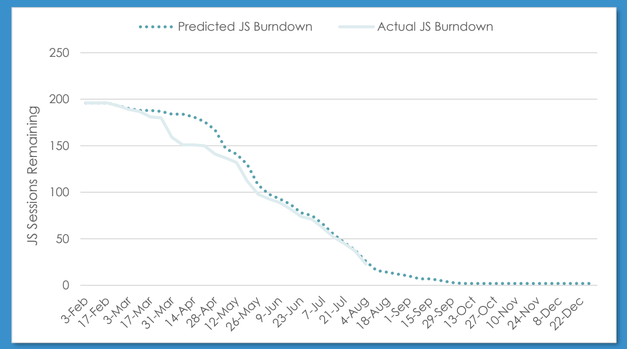
Completed this month	Total Sessions Completed
6	241



Job Shadowing

% Complete	Total Sessions	Remaining Sessions
92%	198	16

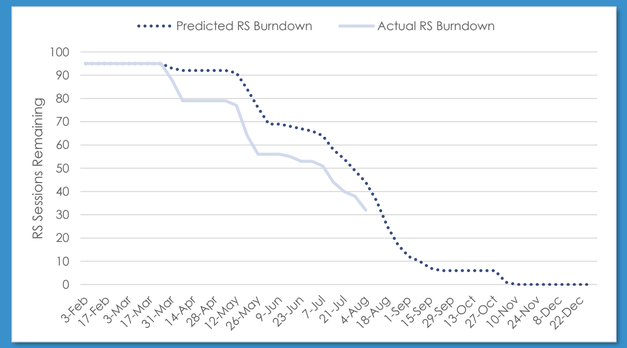
Completed this month	Total Sessions Completed
9	182



Reverse Job Shadowing

% Complete	Total Sessions	Remaining Sessions
68%	95	30

Completed this month	Total Sessions Completed
2	65



M&E Transition Cutover Status

Cutover 2

73%

	Progress: Plan	Progress: Execute	Progress: Verify	Remaining: KT	Remaining: JS	Remaining: RS
Security	100%	91%	65%	0	0	5
Prod Ops	100%	99%	63%	0	8	21
Tech Recovery	100%	99%	65%	0	0	1

Cutover 3

64%

	Progress: Plan	Progress: Execute	Progress: Verify	Remaining: KT	Remaining: JS	Remaining: RS
SCR	100%	100%	61%	8	5	5
Support Svcs.	100%	100%	65%	0	0	0

Cutover 4

65%

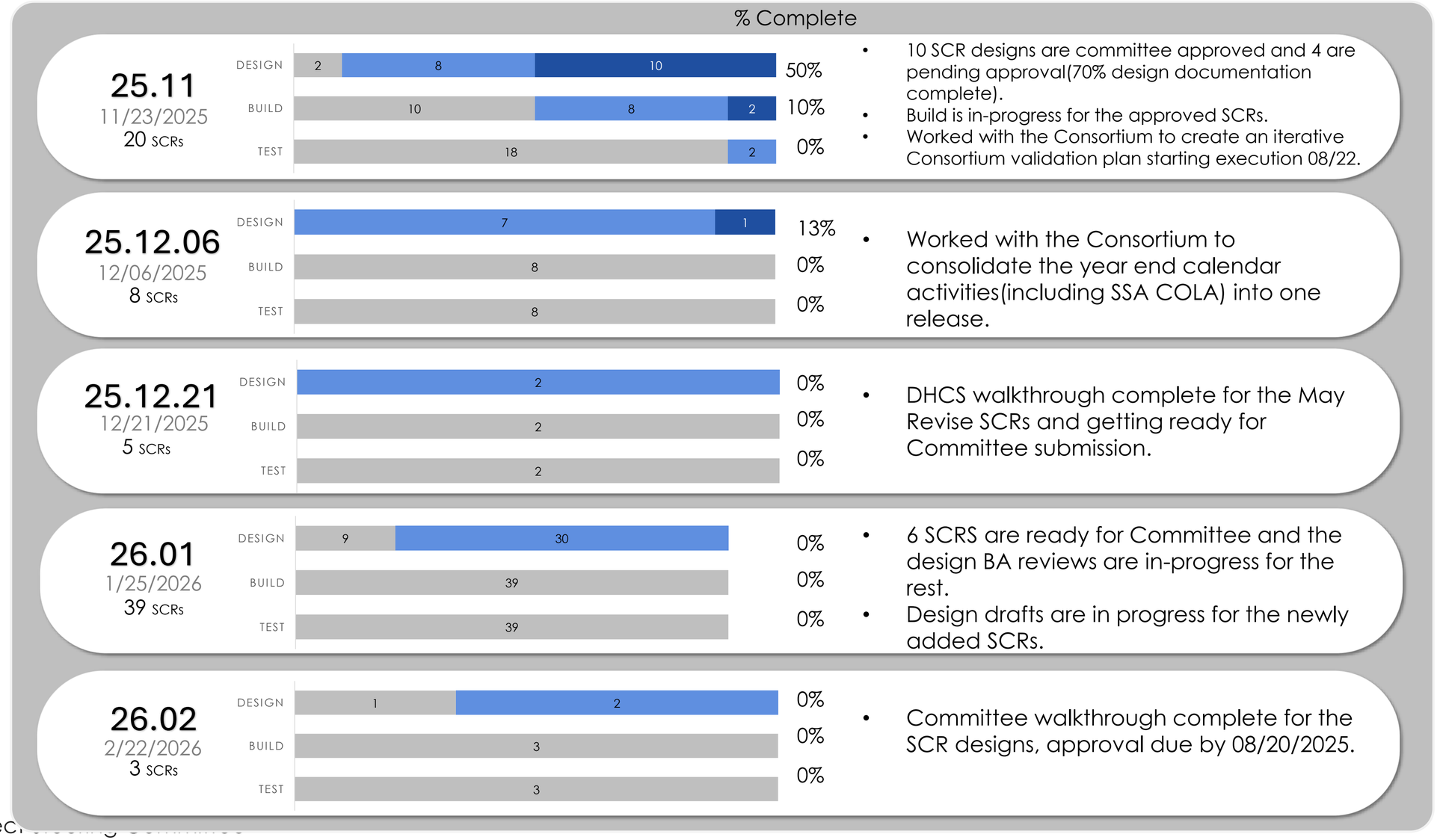
	Progress: Plan	Progress: Execute	Progress: Verify	Remaining: KT	Remaining: JS	Remaining: RS
PMO	100%	100%	60%	0	0	0
OCM	100%	98%	64%	0	3	0
Arch / Innov.	100%	100%	60%	0	0	0

M&E Release Dashboard

As of: 8/7/2025

Not Started | In Progress | Complete

Release Status



Risk Summary

Risk ID	Description	Mitigation Plan	Latest Updates	Trigger Date	Level of Control	Risk Response
ID: 317 Status: 2-Open	Updated May Revise Budget Medi-Cal Revisions effective January 1, 2026 may be at risk for Delivery	• Work with DHCS to finalize policy by June 30, 2025 (Completed) • Acquire development/testing environment by June 30, 2025 (Completed) • Coordinate with CalHEERS to finalize design/testing/deployment timeline by June 30, 2025 (Completed) • Onboard and ramp-up Deloitte SME staff (In Progress) • Finalize CalSAWS system change design by August 31, 2025 (In Progress)	• 8/7/2025: Design in progress. Early Impact Date changed to 9/8/25 and Risk Trigger Date changed to 10/20/2025 since May Revise Revisions are on track for completion before 1/1/26.; • 7/1/2025: DHCS policy received, development/test environment acquired, and CalHEERS SDLC timeline finalized. Early Impact Date changed to 7/31/25 since May Revise Revisions are on track for completion before 1/1/26.; • 5/27/2025: New Risk Created; • 5/22/2025: Submitted SIRFRA 1436 – Age 19 & Over Adult Expansion Freeze and SIRFRA 1437 – Reinstatement of Asset Limit Test for Non-MAGI Medi-Cal;	10/20/2025	3 - Shared	Control
ID: 320 Status: 2-Open	Failure to provide M&E team timely access for M&E may impact M&E release delivery - CalSAWS Environment for Releases	• Resolve access and environment challenges for both on-shore and offshore team members prior to SDLC activities starting; Access includes Environment, Software licenses/tools and AWS specific access (In Progress) • Environment Transition Dates are tracked here	• 7/29 - Development Environments are transitioned. Next Set of environments is for Sys and other higher environments. • 7/14 - Environment Transition Plan spreadsheet link added to "Risk Mitigation Plan" section • 7/1 - Update: One of the mitigation steps is for Deloitte to provide detailed ramp up of access and software license requirements to Gainwell. Accenture to work with Gainwell to provide ramp down and available licenses. • 7/1 - New Risk	9/8/2025	3 - Shared	Control
ID: 322 Status: 1-New	Failure to have an appropriate governance for shared environments between Accenture and Deloitte may impact M&E release delivery	• Collaborate with Accenture to develop a comprehensive plan for the shared environment model; plan will clearly define each vendor's responsibilities, outline coordination mechanisms, and establish right governance for the entire process (In Progress)	• 8/10 - Deloitte and Accenture had multiple calls over the past week to finalize the environment sharing model. Performance and CH2 (CalHEERS environment) are the ones pending and for rest of them team was able to finalize the initial plan.	8/22/2025	3 - Shared	Control

Monthly Performance Trends

Performance Trends

SLAs and Onshore/Offshore Hours

CalSAWS SLAs

May 2025 – July 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%
✓ Local Repair Services		100%

* July metrics are still be reviewed by Consortium and QA

BenefitsCal SLAs

Mar 2025 – July 2025

Deloitte

	Performance
✓ All Daily Transactions	99.87%

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

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

CalSAWS Cost of Rework

	Onshore %	Offshore %
R25.05	0.47%	1.21%
R25.03 - R25.01	1.20%	2.27%
Target	**≤ 10% (combined)**	

CalSAWS Learning Exchange (CLE)

CalSAWS Learning Exchange Sessions

Objective

- CalSAWS Learning Exchange (CLE) sessions provide timely, relevant education for regions on identified topics and allows for Q&A with counties.

- Assess topics ongoing that present challenges for counties and, where appropriate, hold focused CLE sessions to better assist counties in gaining a fundamental understanding of the identified topic(s).

- When possible, the sessions may include willing county partner/s to highlight best practices and lessons learned.

CalSAWS Learning Exchange Sessions

June Imaging CLE

Cultivating CalSAWS Community

The June CalSAWS Learning Exchange covered the topic of **Imaging** and was held on two days, **06/03 and 06/05/2025**. The Imaging CLE provided the counties an understanding of the Imaging functionality available in CalSAWS, recommendations on how to perform various functions, and resources available to users.

- **920** participants attended
- **49** counties represented

Path to the CalSAWS Learning Exchange session materials:

CalSAWS Web Portal > Resources > CalSAWS Learning Exchange > Imaging 6-2025

CalSAWS Learning Exchange Sessions

June Imaging CLE – Feedback

Cultivating CalSAWS Community

"Great presentation especially with information related to BenefitsCal and how documents get processed when submitted by clients."

4.6 out of 5 Star average rating

"I just wanted to let you know that I've been receiving lots of messaging this afternoon asking me who this Rhiannon Chin is and where she's been all of CalSAWS! They are loving her Imaging CLE, saying they are actually learning and enjoying it!"

"I thought it was very informative and thorough."

"Rhi is amazing and provided such great information."

"Providing PowerPoints, charts, and referenced images/pdfs/documents prior for note taking and future reference."

CalSAWS Learning Exchange Sessions

CLE Planning Schedule 2024/2025

Cultivating CalSAWS Community

Next Steps

- **Upcoming Sessions-** Counties receive notification of upcoming CLE activities via Broadcast Notifications followed by meeting invites being sent to County PPOCs to forward to their county staff who they believe who benefit from the respective sessions.

- **County Collaboration**- Counties who have valuable best practices, lessons learned, or business processes to share on requested topics are encouraged to let their RMs know they would like to be considered for inclusion in a specific presentation.

- **Request a CLE Topic**- Via Regional Meetings or contacting your region's RM team; include content desired and priority level (Low. Medium, High) for the topic.

1 2 3 4

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