Project Steering Committee Meeting

September 18, 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

Action Items

4. Pursuant to the JPA Bylaws Article VIII, Paragraph A., the Project Steering Committee shall be co-chaired. The Co-Chairs shall be elected from among the Project Steering Committee members annually.

   a. Seek nominations and creation of a slate for Project Steering Committee Co-Chairs for the period of September 18, 2025, through June 30, 2026.

   b. Proceed to elect the Co-Chairs for the period of September 18, 2025, through June 30, 2026.

5. Approval of the Minutes and review of the Action Items from the August 21, 2025, PSC Meeting.

Informational Items

Project Delivery Office (PDO)

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

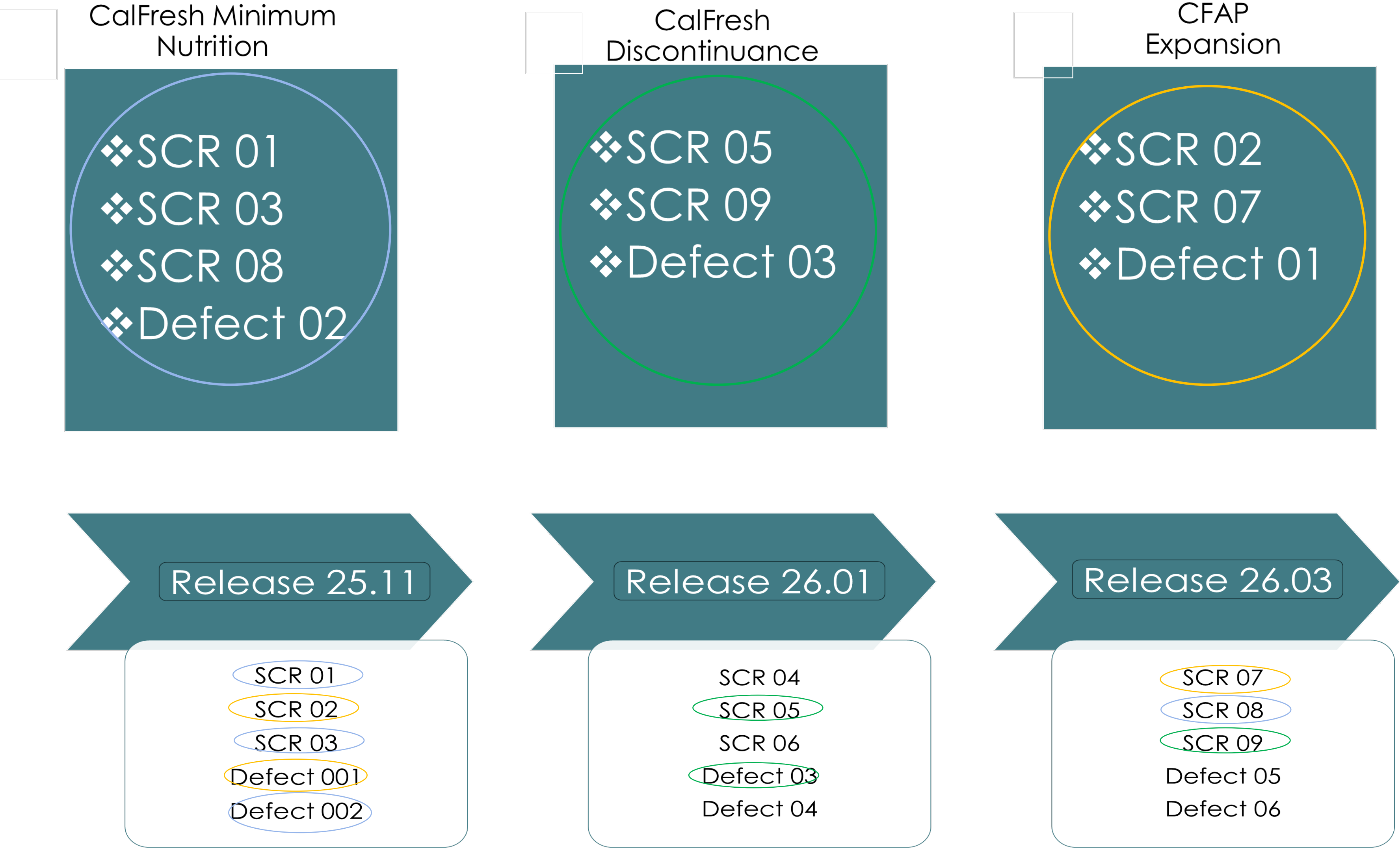**03** Risk reduction across the enterprise
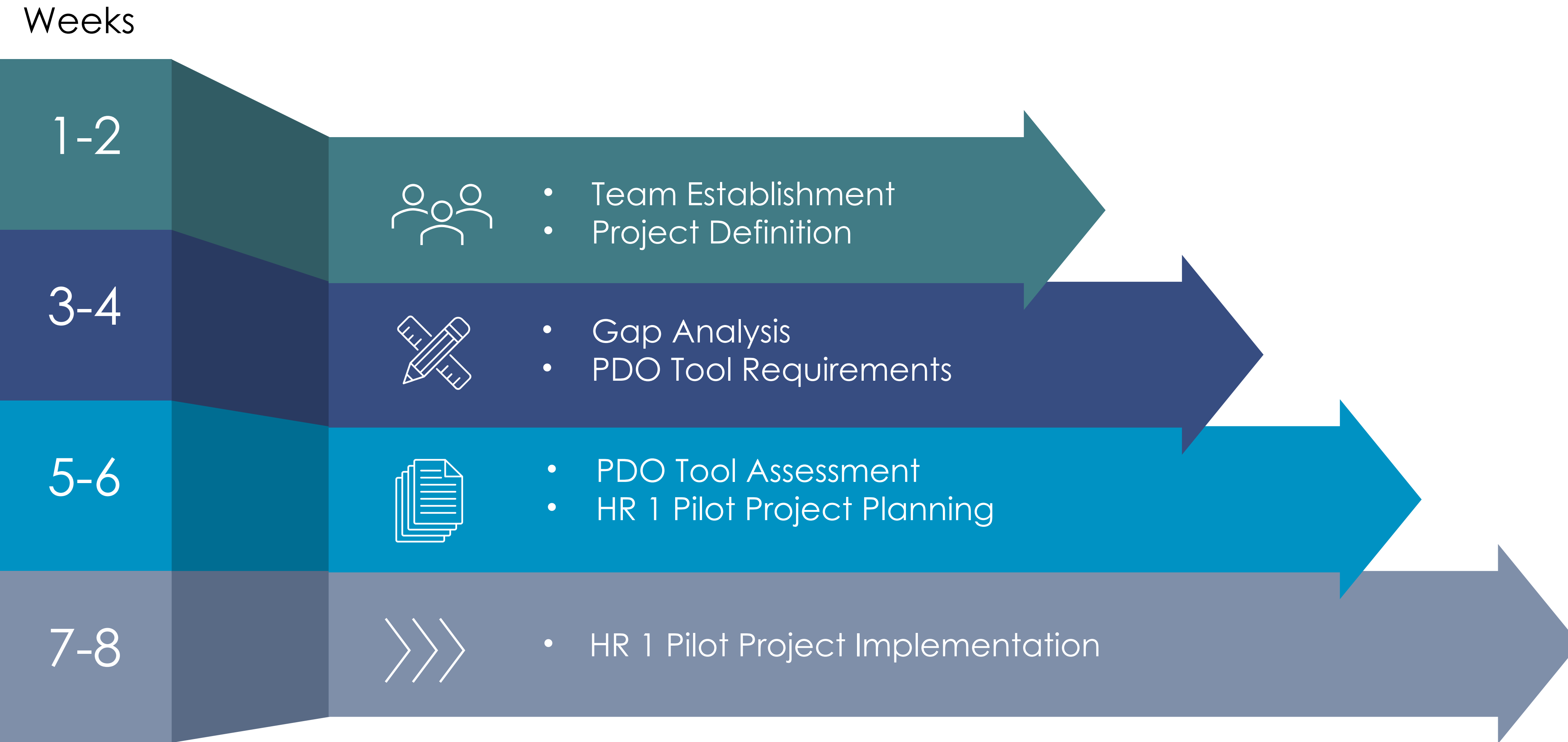
04 Continuous improvement

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

Projects within Releases

CalFresh Minimum Nutrition

- SCR 01
- SCR 03
- SCR 08
- Defect 02

CalFresh Discontinuance

- SCR 05
- SCR 09
- Defect 03

CFAP Expansion

- SCR 02
- SCR 07
- Defect 01

Release 25.11

SCR 01
SCR 02
SCR 03
Defect 001
Defect 002

Release 26.01

SCR 04
SCR 05
SCR 06
Defect 03
Defect 04

Release 26.03

SCR 07
SCR 08
SCR 09
Defect 05
Defect 06

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

County Operational Requests

County Operational Request (COR)

- CIT 0107-205 County Operational Requests issued August 28th updated September 4th.
  - Informed counties to use Service Now to submit CORs beginning Monday September 8th.
  - Process document and video demo provided.

  Note - The CalSAWS Enhancement Request (CER) mailbox is no longer used for CORs.

County Operational Demo

BenefitsCal Update

Account Creation:
Research Takeaways

Customer Account Creation

The UCD team conducted generative research and spoke to 5 customers to get their thoughts on customer account creation.

Who did we talk to?

5
Customers

- June 2025
- One-on-one in-depth interviews
- 60-minute virtual sessions

What did we cover?

- Customer motivations behind creating accounts
- Difficulties with creating accounts
- First impressions, expectations, and preferences on account creation and the home page
- How customers' starting points impact the rest of their journey on BenefitsCal

The Experiences of our 5 Customers Matter

BenefitsCal customers expressed complexities and vulnerabilities in their lives. User-centered research and design help us to make an online system that takes their challenges into account.

"I was diagnosed in my 50s, so why was I diagnosed so early. I thought I did everything I needed to do by not smoking but for my family, that was not enough, it still feels like COVID pushed everything so far ahead. So **these are not minor things, not inconveniences, these are life**.*" - CP*

*"**I help [my parents] with everything that they need.** I help them with cooking, cleaning, things around the house, take them to doctors' appointments. Anything they need." - AS*

"I just got out of jail, I was just released from prison, I don't have a job, I'm disabled, I'm unemployed, I'm staying in a house for people to prevent homelessness from prison. **I had section 8, I had social security, I had CalFresh, and they were all helping me before I went to prison**.*" - GR*

*"**I know all too well about the welfare system, due to domestic violence and identity theft, that is how I ended up on welfare**. I worked at a job, maintained being successful, not having to ask for county help. The first time I asked for help was during Hurricane Katrina and I got food stamps." - PD*

These quotes show us that BenefitsCal isn't just a website, it's an essential tool to assist Californians in receiving benefits.

Account Creation:
Insights & Opportunities

01 Learning by Looking

For a lot of people, it's significantly easier to digest information when they have a visual reference to guide them. Even processes that customers might already be familiar with can be made easier with the right kind of instructions.

Leaning into this visual learning style can help BenefitsCal better cater to customers' wants and needs.

"I am a visual learner, so I learn by watching those videos. And I also learn from reading but overall, **pictures are worth a thousand words so just looking at the videos, I find that informative**." – AS, 47

01 Learning by Looking

Insight to Opportunity:

How might we make information more comprehensible for various learning styles?

Opportunity Areas

Intuitive Web Design and Accessible Information

Associated Features/Functions

Help Center

CalSAWS Objectives

1. Enhance self-service access
2. Streamline administrative processes
3. **Enhance user experience & support**
4. Enhance reporting, analytics, and client communication capabilities for greater flexibility and insights

Potential Next Steps

Comprehensive audit of Help Center materials
Examples:
➢ Open up YouTube tutorials to feedback from customers
➢ Evaluate content and organization of Help Center

Redesign Help Center to be more intuitive

Incorporate a link for Account Creation YT tutorial into the flow (as is the case with other How-to videos).

02 # Reliable Sources Drive Customer Behavior

County workers play an important role in influencing customer behavior. Even customers who may be averse to doing things online in general can be more open to using BenefitsCal if the recommendation comes from the right place. Because customers see county workers as an official and trustworthy source, they're more receptive to the information that county workers give them.

Coming from the county, signing up for BenefitsCal might seem more like a logical next step as opposed to an optional hurdle.

"When I spoke to the worker in the office, she walked me through… where to go. So, **because she made the suggestion and walked me through how to get to what I needed, I trusted her** to get me to the right things and to not lead me incorrectly." - PD, 48

Reliable Sources Drive Customer Behavior

02

Insight to Opportunity:

How might we make county workers feel ownership over BenefitsCal?

Opportunity Areas

Marketing and Outreach

Intuitive Web Design and Accessible Information

Associated Features/Functions

Community Engagement Strategies

CalSAWS Objectives

1. **Enhance self-service access**
2. Streamline administrative processes
3. Enhance user experience & support
4. Enhance reporting, analytics, and client communication capabilities for greater flexibility and insights

Potential Next Steps

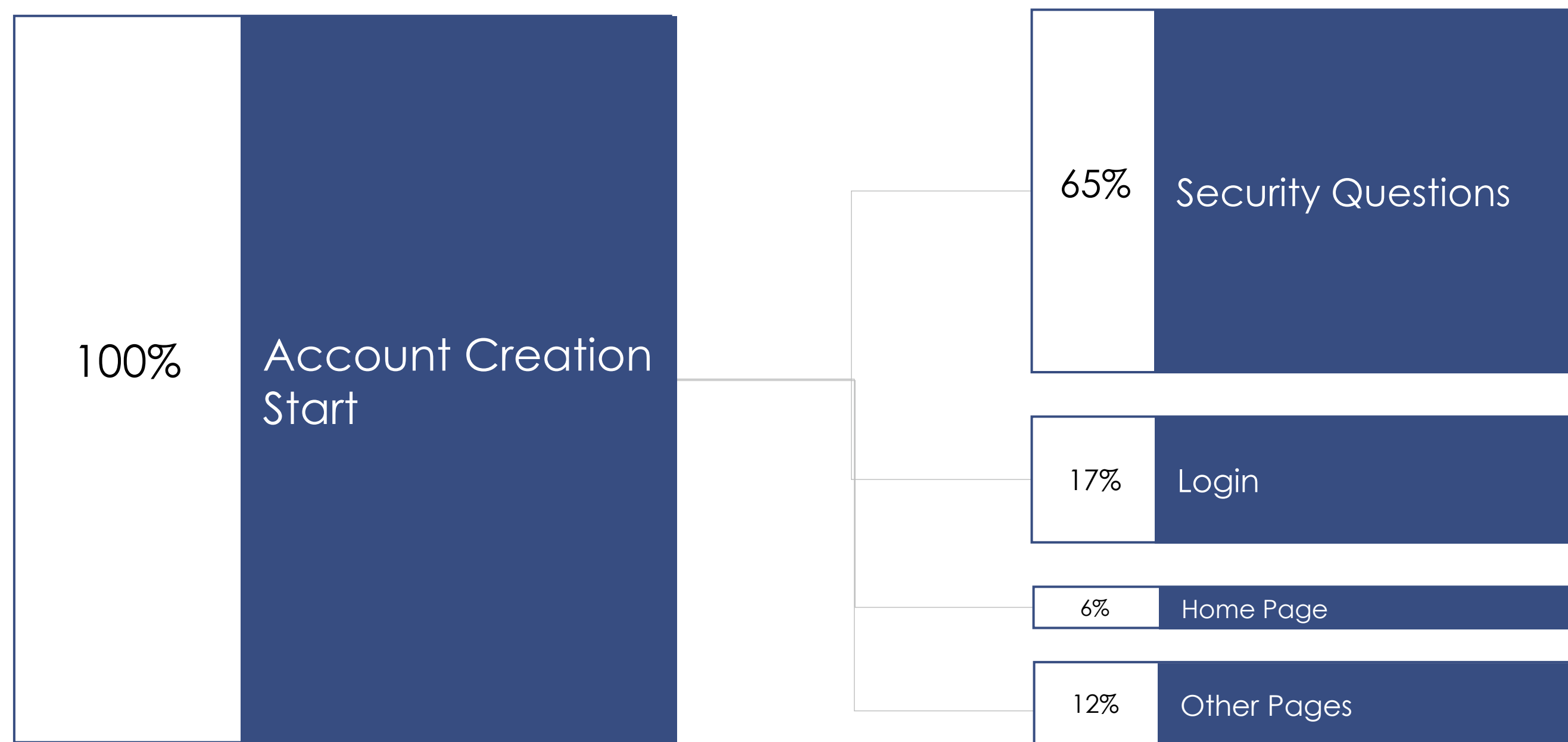**Develop a BenefitsCal county worker engagement strategy**
Examples:
➢ Humanizing BenefitsCal through Robin or other tools

Customer Account Creation:
Quantitative Analysis

05 Quantitative Analysis

Customer Journeys from Account Creation Start

100% Account Creation Start	**65%** Security Questions
	17% Login
	6% Home Page
	12% Other Pages

Breakdown of Triggered Validation Messages

13%

50%

36%
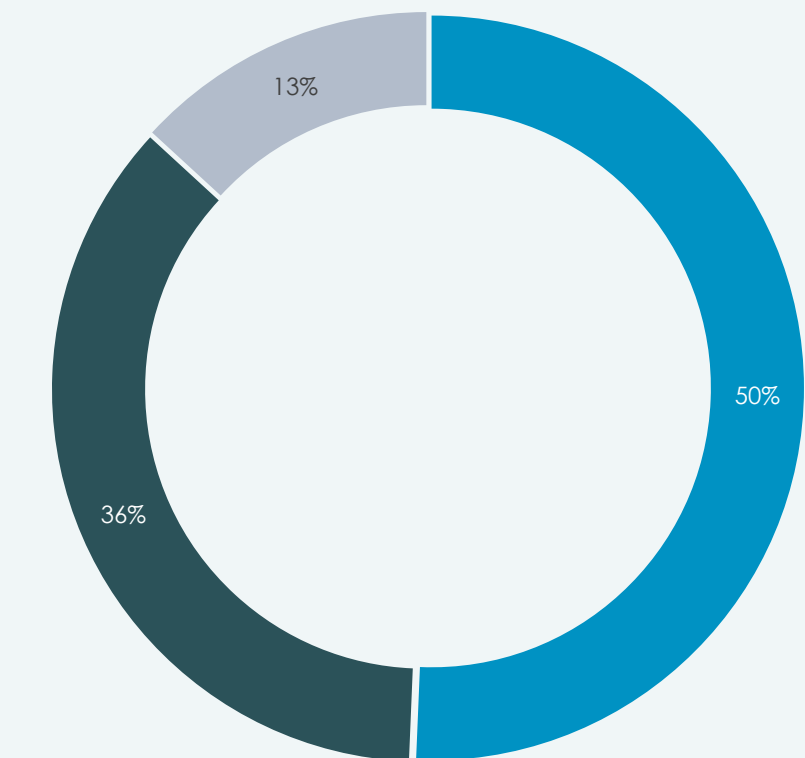
- Email already in use
- Phone number already in use
- All others

86% of all triggered validation messages had to do with **email or phone number already in use**

05 Quantitative Analysis

Insight to Opportunity:

How might we better direct customers to their relevant BenefitsCal journey?

Opportunity Areas

Intuitive Web Design and Accessible Information

Online Communications and Messaging

Associated Features/Functions

Account Creation Flow

CalSAWS Objectives

1. **Enhance self-service access**
2. Streamline administrative processes
3. **Enhance user experience & support**
4. Enhance reporting, analytics, and client communication capabilities for greater flexibility and insights

Potential Next Steps

Update copy to make error messages more relevant to customer journeys
Examples:
➢ Direct customers with emails already in use to the login page
➢ Clarify special characters they can use

Allow customers to create accounts with minimal information
Examples:
➢ Remove optional fields like phone number and county during the account creation process

EBT Display Enhancement KPIs

EBT Display Enhancement

WHAT WE HEARD

Customers expressed the need to have more robust information about EBT balance and activity at their fingertips.

"It would just be quicker if you glanced down, if you saw refund, charge. Maybe that would help you if you forgot what you did or didn't do." JM

"[It's important] Having that main information – your benefits amount, on CalWIN it showed you your monthly and how much you have left." AB

WHAT WE DID

Implemented an enhancement to address Customer pain points and requests. These new EBT Features on BenefitsCal Enhancement went live on June 5, 2025.

06/13/2025 | 06:39 AM
Food Return + $2.00
Card Number: ...1556

06/13/2025 | 06:39 AM
Food Return + $50.00
Card Number: ...1556

06/13/2025 | 06:39 AM
Cash Purchase - $150.00
Card Number: ...1556

Intended Outcomes

- ✓ **Improve customer experience** by making transaction history **more intuitive**

- ✓ Provide **additional details such as positive vs negative transactions, associated card numbers, and transaction filters** to give customers the information they want

- ✓ Improve theft reporting usability by **making transaction selection more specific**

EBT KPI Measured Results

WHAT WE MEASURED

Customers spend **less time on the transaction history page**, indicating that they **get their needs met quicker**.

There are **fewer manual transactions when reporting fraud**, indicating that **customers are able to solve their issues** with the specific options provided to them. The decreased need for manual entries for theft reporting led to more **accurate data shared with counties**.

A reduction in Helpdesk inquiries and Always-On Survey comments further validate the **improved customer experience** found in web analytics findings.

1 Web Analytics

TIME SPENT ON TRANSACTION HISTORY PAGE

May Avg	2.15 min
Jun Avg	1.85 min
Jul Avg	0.91 min
% Change	-57.7%

MANUAL TRANSACTION ENTRIES ON THEFT PAGE

May	952
Jun	737
Jul	594
% Change	-37.6%

2 Direct Customer Feedback

HELPDESK TIER 2 INQUIRIES TRACKER

No. of Inquiries in May	12
No. of Inquiries in June	1

ALWAYS-ON SURVEY FINDINGS PERTAINING TO EBT

% of Comments in May	7%
% of Comments in June	<1%

BenefitsCal Public Facing Enhancements

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

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.

November Release 25.11

- **Always-On Survey**: Update the Always-On Survey to actively invite users to participate in user-centered design activities.
- **Account Creation OTP**: Modify the account creation flow to reduce the number of OTPs a customer receives.
- **Citizenship Document Type:** Add help text to notify users that a case worker may request a citizenship or immigration document later per policy direction.

October Release 25.10

- **Document Center:** Revise the list of document types in the Document Center to include more specific categories, making it easier for customers to find what they need.
- **MC 604 IPS:** Allow users to upload supplemental property documentation with their Medi-Cal renewal per policy direction.
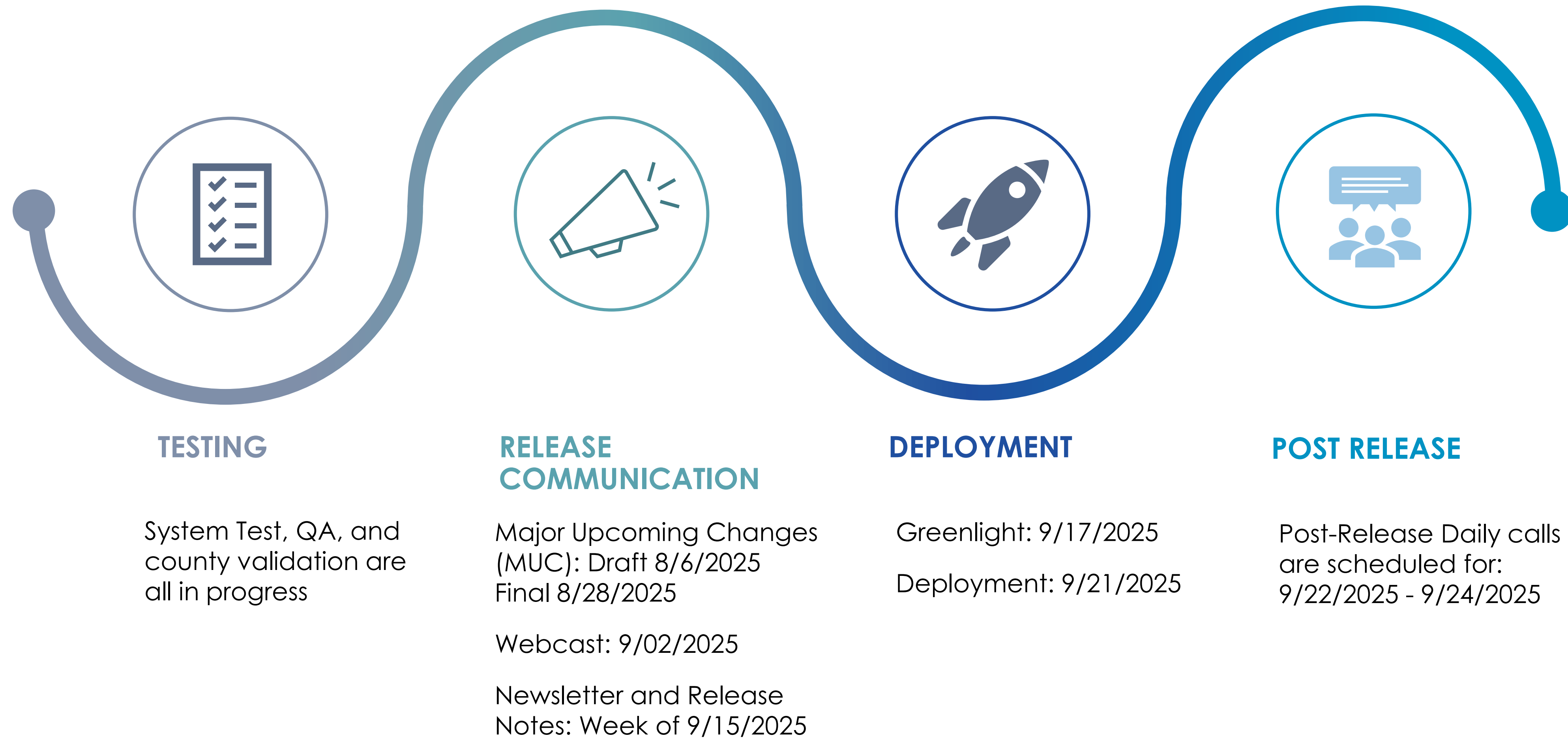
Release &
Policy Updates

Release and Policy Update

Upcoming Releases

September
Baseline (9/22/2025) and Priority Releases

9/4/2025:
- 2025-2026 CalFresh COLA and CalWORKs IRT Levels for 2025-2026

9/13/2025:
- 2025-2026 CalFresh COLA and CalWORKs IRT - EDBC Batch Run

9/22/2025:
- Send MEDS Non-Extended Aid Codes For Foster Care & Kin-GAP Infants
- 2025 Updates to the Single Streamlined Application

9/XX/2025:
- ACL 25-50 H.R. 1 Limits to Standard Utility Allowance Subsidy

October
Priority Releases

10/02/2025:
- Generate No Change NOA for CalWORKs Voluntary Mid-Period Actions

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

December
Priority Releases

12/06/2025:
- Batch EDBC to apply 2026 SSA Cost of Living Adjustments (COLA)

12/21/2025:
- ACWDL 25-14: Reinstatement of Asset Limit Test for Non-MAGI Medi-Cal
- ACWDL 25-13: Medi-Cal Adult Expansion Freeze for 19 and Older without Satisfactory Immigration Status

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 Update

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 9/4/2025:

- **CalFresh:**
  o The ABAWD policy effective date is February 1, 2026, while the remaining HR 1 effective dates have not yet been determined.
  o Policy letters are pending
- **Medi-Cal:**
  o Policy letters are pending
  o 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:**
  o Recruiting a workgroup to design and review Medi-Cal changes
  o A CalFresh workgroup may be formed once more details are known

May Revise & HR 1Policy Roadmap*

Sep XX, 2025 (09.XX.25)

- **CA-292684** - Limit the Standard Utility Allowance Subsidy

Policy effective 10/1/2025

Dec 21, 2025 (12.21.25)

- **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

Jan XX, 2026 (01.XX.26)

- **CA-292683/CSPM-80744** - Changes to ABAWD Exemptions and Expiration of Statewide Waiver

Policy effective 2/1/2026

Jun15, 2026 (26.06)

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

- **CA-292997/CSPM-80930-** Retroactive Medi-Cal Reduced Timeframes

Policy effective 10/1/2026 & 1/1/2027

Sep 21, 2026 (26.09)

- **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-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*

Nov 23, 2026 (26.11)	Jul 24, 2028 (28.07)	Nov 19, 2029 (29.11)	TBD
• **CA-286076** - ACWDL 25-06 Update Medi-Cal Members Address	• **CA-293433** - Cost Sharing for Expansion Adults	• **CA-293024** - National Federal Address Database for Address Verification	• **CA-293006** - Deceased Member Verification • **CA-292686/CSPM-80927** - Non-Citizen Eligibility Updates
Policy effective 1/1/2027			

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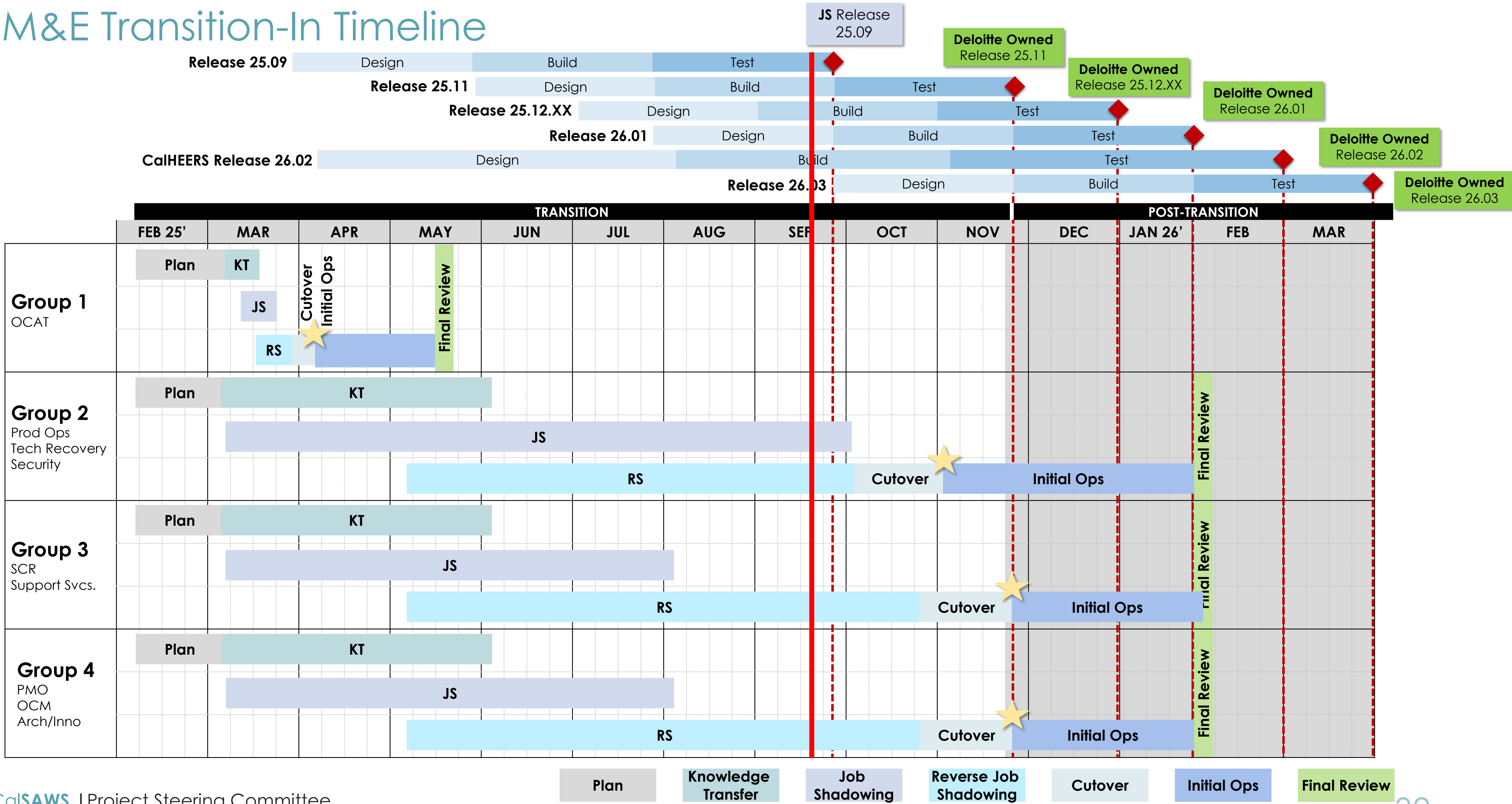
- System test conducted by vendors, three consortium testers, and Quality Assurance staff
- Execute system test scripts and perform integrated testing with CalHEERS and BenefitsCal

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

M&E Transition-In Timeline

M&E Transition Cutover Progress and Status

As of: 9/5/2025

M&E Transition Progress

Knowledge Transfer

98%	253	6
% Complete	Total Sessions	Remaining Sessions

1	247
Completed this month	Total Sessions Completed

Predicted KT Burndown — Actual KT Burndown
KT Sessions Remaining vs Week Of

Job Shadowing

98%	214	4
% Complete	Total Sessions	Remaining Sessions

5	210
Completed this month	Total Sessions Completed

Predicted JS Burndown — Actual JS Burndown
JS Sessions Remaining vs Week Of

Reverse Job Shadowing

85%	99	15
% Complete	Total Sessions	Remaining Sessions

1	84
Completed this month	Total Sessions Completed

Predicted RS Burndown — Actual RS Burndown
RS Sessions Remaining vs Week Of

M&E Transition Cutover Status

Cutover 2 — 82%

	Plan	Execute	Verify	KT	JS	RS
Security	100%	99%	80%	0	0	4
Prod Ops	100%	99%	80%	0	2	9
Tech Recovery	100%	99%	80%	0	0	1

Cutover 3 — 69%

	Plan	Execute	Verify	KT	JS	RS
SCR	100%	100%	72%	5	1	1
Support Svcs.	100%	100%	74%	1	0	0

Cutover 4 — 71%

	Plan	Execute	Verify	KT	JS	RS
PMO	100%	100%	70%	0	0	0
OCM	100%	100%	72%	0	1	0
Arch / Innov.	100%	100%	70%	0	0	0

M&E Release Dashboard

Not Started | In Progress | Complete

Release Status

Notes

% Complete

25.11
12/22/25
27 SCRs

Phase	% Complete
Design	81%
Design Approval	62%
Build	29%
Test	0%

Design: 5 / 22
Design Approval: 5 / 5 / 17
Build: 14 / 5 / 8
Test: 19 / 8

- Coordinating to finalize design approvals.
- Design is in-progress for newly added SCRs.
- Build is in-progress for the approved SCRs.
- Coordinating with teams to begin testing.

25.12.06
12/06/25
5 SCRs

Phase	% Complete
Design	0%
Design Approval	0%
Build	0%
Test	0%

Design: 5
Design Approval: 5
Build: 5
Test: 5

- Designs are In-Progress.
- Scope includes SSA COLA and ABAWD Waiver mass mailer.

25.12.21
12/21/25
2 SCRs

Phase	% Complete
Design	50%
Design Approval	0%
Build	0%
Test	0%

Design: 1 / 1
Design Approval: 1 / 1
Build: 2
Test: 2

- Committee feedback due on 9/8 for the May Revise SCRs.
- Build started for 2 SCRs.

26.01
1/25/26
48 SCRs

Phase	% Complete
Design	46%
Design Approval	0%
Build	0%
Test	0%

Design: 26 / 22
Design Approval: 26 / 22
Build: 48
Test: 48

- 14 SCRS are ready for Committee and the design BA reviews are in-progress for the rest.
- Design drafts are in progress for the newly added SCRs.

26.02
2/22/26
3 SCRs

Phase	% Complete
Design	66%
Design Approval	66%
Build	0%
Test	0%

Design: 1 / 2
Design Approval: 1 / 2
Build: 1 / 2
Test: 3

- Designs submitted, CCB approval due on 09/05.

M&E Risks

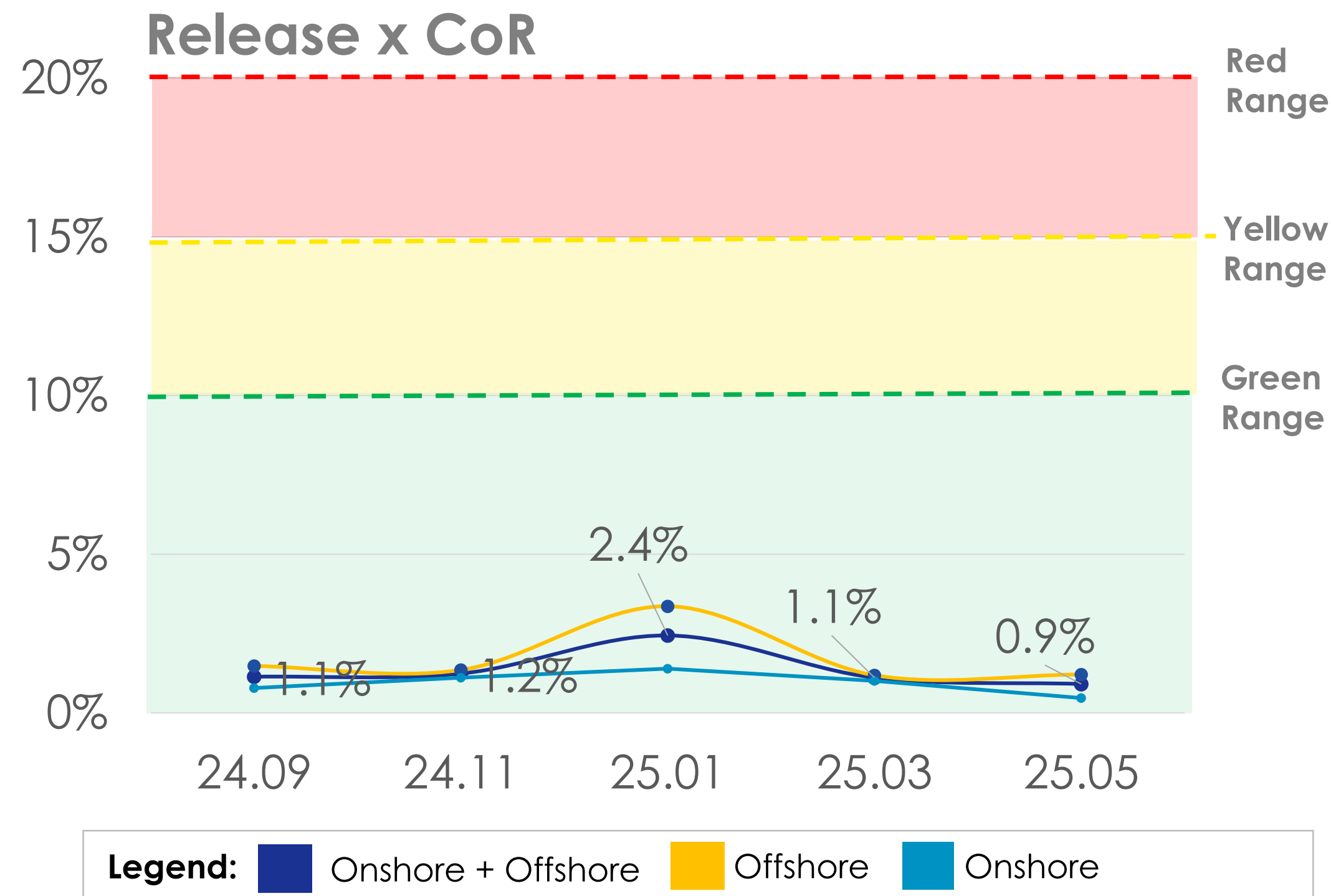| Number	Summary	Mitigation & Next Steps
ID: 315 Status: 2-Open	**Absence of a Finalized 2026 CalHEERS release schedule may create challenges for CalSAWS to deliver CalHEERS-designated changes** Every year, California Healthcare Eligibility, Enrollment and Retention System (CalHEERS)and CalSAWS Project performs an annual review of the prioritized changes for the upcoming year. This process facilitates planning and coordination of upcoming changes to accommodate Joint Application Design, Build, and Test activities within a 12-month timeframe. Three (3) integrated CalSAWS/CalHEERS releases are planned for 2026: 26.2, 26.6, and 26.9. Requested 2026 CalHEERS changes, with CalSAWS impacts, was larger than historical years. In addition, DHCS requested an additional release to support Verify Lawful Presence Service changes. DHCS, CalHEERS, CalSAWS are conducting sessions to plan out the entirety of 2026 taking in consideration CalSAWS M&E Transition, CMS Requirements, and on-going DHCS policy prioritization. CalSAWS' ability to deliver 2026 CalHEERS designated changes may be at risk without a finalized CalHEERS release schedule.	• Confirmed Release 26.2 Scope (Completed) • Confirm Verify Lawful Presence Implementation release date (Completed - moved out of 2026) • Confirm scope for the remainder of 2026 (In Progress) • Perform enhanced monitoring of internal and external schedule and delivery milestones adjusting scope and schedule as needed (In Progress)
ID: 317 Status: 2-Open	**Updated May Revise Budget Medi-Cal Revisions effective January 1, 2026 may be at risk for Delivery** As part of the State Fiscal Year 2025/2026 Revised Budget, two policy updates are expected to be implemented by January 1, 2026. These policy updates are the (1) Full-Scope Medi-Cal Enrollment Freeze for Non-Satisfactory Immigration Status and (2) Reinstatement of the Non-MAGI Medi-Cal Asset Limit Test. The Enrollment Freeze update will require coordination between the CalSAWS and CalHEERS Project. The implementation of these changes should not conflict with the SSA COLA Batch Run planned for December 2025. Without finalized staffing, policy, timeline, and environment plan, the delivery and implementation of these policy updates might be at risk.	• 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)
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** Deloitte staff may be unable to perform certain SDLC activities timely for the M&E releases beginning with 25.11 without access to releases specific CalSAWS environments and tools. (Split from Risk 313.)	• 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
ID: 322 Status: 2-Open	**Shared environments between Accenture and Deloitte may impact M&E 25.11 release delivery** As we transition to CalSAWS release environments and tools, certain environments and tools may need to be jointly accessed and used by both Accenture and Deloitte teams. This shared access/usage may potentially lead to code conflicts, unauthorized data changes, application issues, security and performance issues due to increased user load, system outages in production or lower environments impacting productivity/delivery timeframes. This can impact the M&E release 25.11.	• Deloitte will collaborate with Accenture to develop a comprehensive plan for the shared environment model. This plan will clearly define each vendor's responsibilities, outline coordination mechanisms, and establish right governance for the entire process • 8/22 - Mitigation Plan is updated on the SharePoint here

M&E Risks (cont.)

Number	Summary	Mitigation & Next Steps

ID: 319
Status: 2-Open
	Delays in the CARES conversion approach may impact CalSAWS transition activities
	
	The transition of CalSAWS FCED responsibilities to the Deloitte team originally had a plan for the conversion logic to be fully vetted for requirements, designed and built prior to handing it over. As part of the plan the testing and execution pieces have always been planned to be transitioned. Due to the delays in finalizing the approach of the conversion effort, the design and build are more likely to be a part of the transition process.
		• Accenture and Deloitte transition teams will work together to identify a plan for mitigating the risk. Potential options for mitigation are
		  • More direct focus on the conversion transition
		  • Additional Deloitte resources identified for attending FCED conversion meetings
		• Timelines
		  • August 31, 2025 - Define/Refine transition plan and schedule
		  • September - November 2025 execute transition plan

ID: 321 Status: 2-Open	**Uncertainty on approach for transmitting Vendor information to CalSAWS may impact large county automation** During development of the FCED/CARES APIs, the CalSAWS project identified a concern with the proposed approach for sharing vendor information from the CARES system. The CalSAWS approach is that vendors, which are stored in the Resource Data Bank (RDB), are designed to be entered once and then associated to cases that are using that vendor. CARES Vendor = CalSAWS Foster Care Resource, which becomes the Placement and payee on the Foster Care program. The CARES project approach is to store vendor information at the case level, which will duplicate data across cases that use the same vendor. The approach would require county staff to coordinate updates to RBD across all placements that utilize it. This could mean coordination across offices within a single county or coordination across multiple counties if a CalSAWS Foster Care Resource is servicing multiple cases across counties. The CalSAWS FCED team suggested creating a separate Vendor API to share vendor information separate from the Placement data. This approach would prevent vendor data for the same resource being sent for each case that uses it. The CARES project has yet to agree to a Vendor API approach which puts the development of large county automation at risk due to the uncertain final design of the logic. Additionally, the lack of final approach makes it increasingly likely that the CalSAWS Deloitte team will be getting the automation logic half completed during transition instead of complete, as planned. If the Vendor API fails to be built prior to initial implementation of the FCED interface, counties will be required to take significant manual steps to create the vendor in Resource Data Bank (RDB) prior to processing any placement information from CARES. Beyond the manual effort, this could delay benefits to customers while the manual processing of resource data takes place.	• Continue to work with the CARES project to explore the best approach for sharing vendor information through the FCED/CARES APIs. • Coordinate possible business process changes for large counties that will opt in for the automation approach.

ID: 323
Status: 0-Draft
	Inaccurate performance metrics from the CARES to CalSAWS interface will have a negative impact on performance planning
	
	Conversations with the CARES project about performance test planning included schedule, approach, and metrics. During the discussion of performance metrics, the volume of assumed CARES to CalSAWS transactions was identified to be inaccurate.
	The CARES team had based estimates on the 10-year high of created Foster Care cases in CWS/CMS. That number failed to account for daily system updates, Kin-GAP, or AAP cases. The lack of accurate numbers prevents the performance team from creating performance test plans in anticipation of the performance test with CARES, currently targeted for an end of November start date.
		• Coordinate with the CARES project on our bi-monthly performance meetings to refine the metrics being used to mitigate impacts on the performance team's test planning activities.
		• In the absence of reasonable metrics, the performance test team will provide educated estimates by using the CalSAWS estimated outbound volumes. The assumption that CARES will have a similar number of updates in their system to CalSAWS is possibly an inaccurate approach but the best that can be done in the absence of CARES metrics.
		• Timeline:
		  1. September 2025 - Define acceptable and agreed upon threshold metrics
		  2. October 2, 2025 - Finalize approach and being performance test planning

Monthly Performance Trends

CalSAWS Quarterly Statistics

CalSAWS Application Release Quality Metrics

Release x CoR

Chart axis labels: 20%, 15%, 10%, 5%, 0%

Range labels: Red Range, Yellow Range, Green Range

Data point labels: 1.1%, 1.2%, 2.4%, 1.1%, 0.9%

X-axis: 24.09, 24.11, 25.01, 25.03, 25.05

Legend: Onshore + Offshore | Offshore | Onshore

TYPICAL RANGES
GREEN: The amount of time being spent on rework is lower than expected. This will enable the project to be completed faster and more efficiently.
AMBER/**RED**: The amount of time being spent on rework is higher than expected. This may impact the delivery schedule.

Cost of Rework (CoR) is the ratio of effort spent performing rework on deliverables to the total effort to Date
(Actual Rework effort Hours/ Actuals To Date Hours)*100

The combined onshore and offshore CoR for CalSAWS code release deployment remains low across releases indicating high quality releases with the additional offshore team
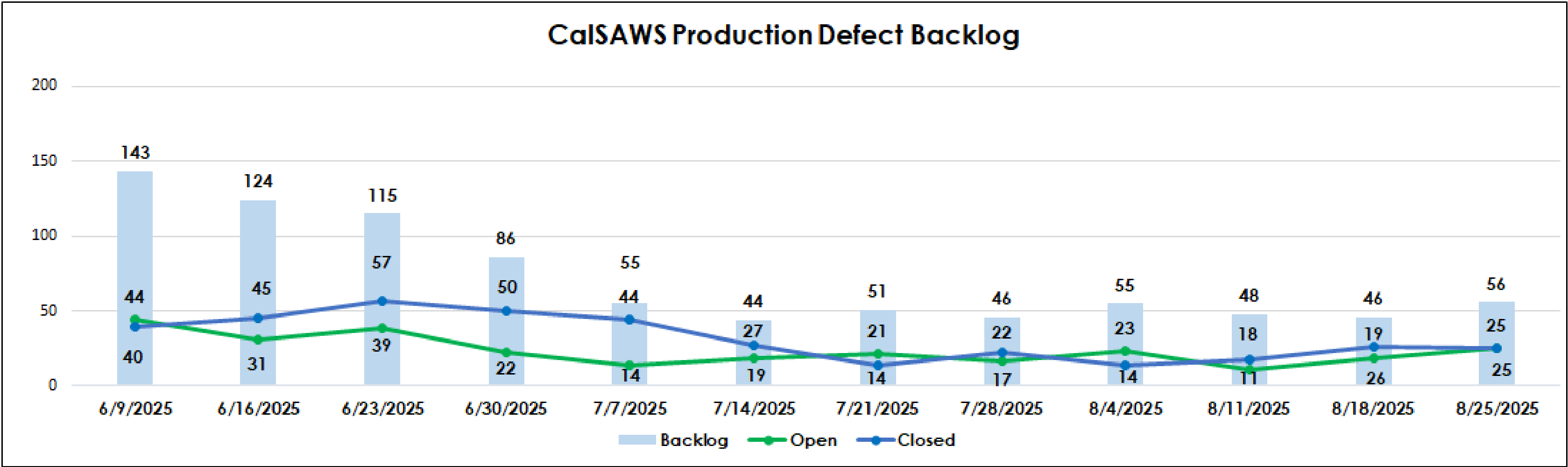
The CoR line graph may increase for the releases if additional defects are found in the future

New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 25.07 COR numbers will be available after 25.09 goes live

CalSAWS Quarterly Metrics

Production Defects Backlog

Open production defect rate has remained level, demonstrating system stability with no major spikes outside of normal ranges

CalSAWS Production Defect Backlog

Date	Backlog	Open	Closed
6/9/2025	143	44	40
6/16/2025	124	31	45
6/23/2025	115	39	57
6/30/2025	86	22	50
7/7/2025	55	14	44
7/14/2025	44	19	27
7/21/2025	51	14	21
7/28/2025	46	17	22
8/4/2025	55	14	23
8/11/2025	48	11	18
8/18/2025	46	26	19
8/25/2025	56	25	25

The Production defect backlog bar-chart depicts the balance of open (unresolved Production defects) and closed defects, week-over-week. Defects are closed upon system test validation and release deployment to Production

CalSAWS Quarterly Metrics

Production M&E SLA Metrics

Perf Req #	LD Applies	Performance Requirement Title	May	June	July	Aug
1		Monthly Off Prime Business Hours Availability	✅	✅	✅	✅
2		Monthly Prime Business Hours Availability of CalSAWS Non-Production Environments	✅	✅	✅	✅
3		Monthly Deficiency Notification Response Time	✅	✅	✅	✅
4		Monthly Helpdesk Diagnosis Time	✅	✅	✅	✅
5	LD	Daily Peak Usage Hours Availability	✅	✅	✅	✅
6	LD	Daily Prime Business Hours Availability	✅	✅	✅	✅
7	LD	Daily Peak Usage Hours ED/BC Response Time	✅	✅	✅	✅
8	LD	Daily Prime Business Hours ED/BC Response Time	✅	✅	✅	✅
9	LD	Daily Peak Usage Hours Screen to Screen Navigation Response Time	✅	✅	✅	✅
10	LD	Daily Prime Business Hours Screen to Screen Navigation Response Time	✅	✅	✅	✅
11	LD	Daily Batch Production Jobs Completion	✅	✅	✅	✅
12		Daily Off Prime Business Hours ED/BC Response Time	✅	✅	✅	✅
13		Daily Off Prime Business Hours Screen to Screen Navigation Response Time	✅	✅	✅	✅
14		Daily Unbounded Search Response Time	✅	✅	✅	✅
15		Daily Prime Business Hours Availability of CalSAWS Training Environments	✅	✅	✅	✅
16		Daily Peak Usage Hours Standard Report Response Time	✅	✅	✅	✅
17	LD	Security Incident Notification	✅	✅	✅	✅
18	LD	Security Incident Reporting	✅	✅	✅	✅
19	LD	Security Incident Negligence	✅	✅	✅	✅

August SLA Metrics are still being formally reviewed

Legend: ✅ SLA Met   ❌ SLA Not Met   🔽 LD Applies

Performance reports are emailed to RMs and posted to the CalSAWS Web Portal for County PPOCs and County Help Desk Staff.

CalSAWS Quarterly Metrics

Infrastructure

Perf Req #	Performance Requirement Title	Feb	Mar	Apr
1	Daily Prime Business Hours Availability	✅	✅	✅
2	Monthly Prime Business Hours Availability, Non-Production Environments	✅	✅	✅
3	Monthly Off Prime Business Hours Availability	✅	✅	✅
4	Local Repair Services	✅	✅	✅
5	Daily Prime Business Hours Availability of CalSAWS Training Environments	✅	✅	✅
6	Monthly Deficiency Notification Response Time	✅	✅	✅
7	Monthly Service Desk Diagnosis Time Tiers 1 and 2	✅	✅	✅
8	Daily Prime Business Hours Standard Report Response Time	✅	✅	✅
9	Disaster Recovery Response Time	✅	✅	✅
10	Failure to Complete Access Control Audits	✅	✅	✅
11	Security Information and Event Management System Uptime	✅	✅	✅
12	Scheduled Asset Inventory Audits	✅	✅	✅
13	Completion of Root Cause Analysis	✅	✅	✅
14	Privileged Access Audit	✅	✅	✅
15	Security Vulnerability Scans	✅	✅	✅
16	Security Incident Notification	✅	✅	✅
17	Security Incident Reporting	✅	✅	✅
18	Security Incident Negligence	✅	✅	✅

* SLA Metrics are still being formally reviewed

Legend: ✅ SLA Met ❌ SLA Not Met

Performance reports are emailed to RMs and posted to the CalSAWS Web Portal for County PPOCs and County Help Desk Staff after the formal review.

Hyland Quarterly Metrics

Hyland Imaging Performance Metrics

Performance Requirement Title	Performance Average Jun-Aug 2025	Monthly Target	SLA Met
Uptime	100%	99.90%	✅
Page Views	99.35%	90%	✅
Database Transactions	99.98%	90%	✅
Brainware Processing	98.64%*	97%	❌
Technical Resources Response Time	0	>30 minutes	✅

*Three-month average meets the target. July 2025 did not meet the monthly target.
 Unmet Brainware Processing SLA in July 2025 - 96.74%

Legend: ✅ SLA Met ❌ SLA Not Met

BenefitsCal Performance Metrics

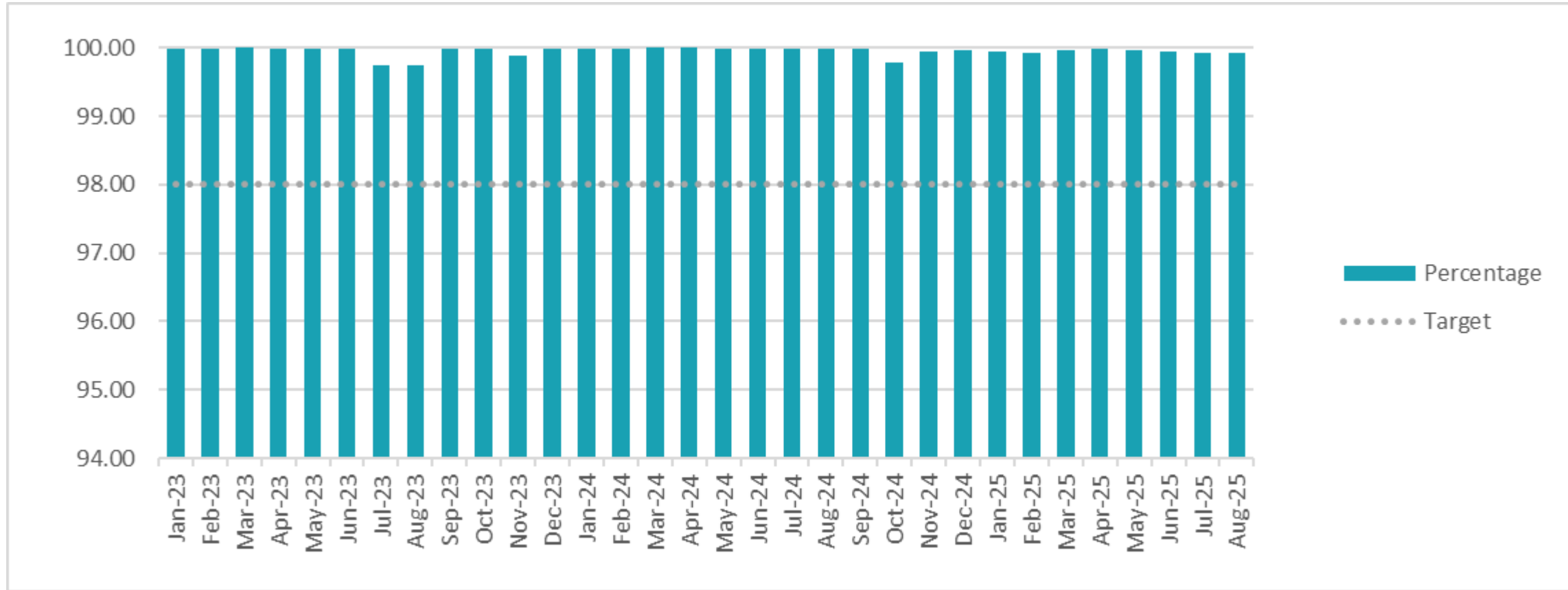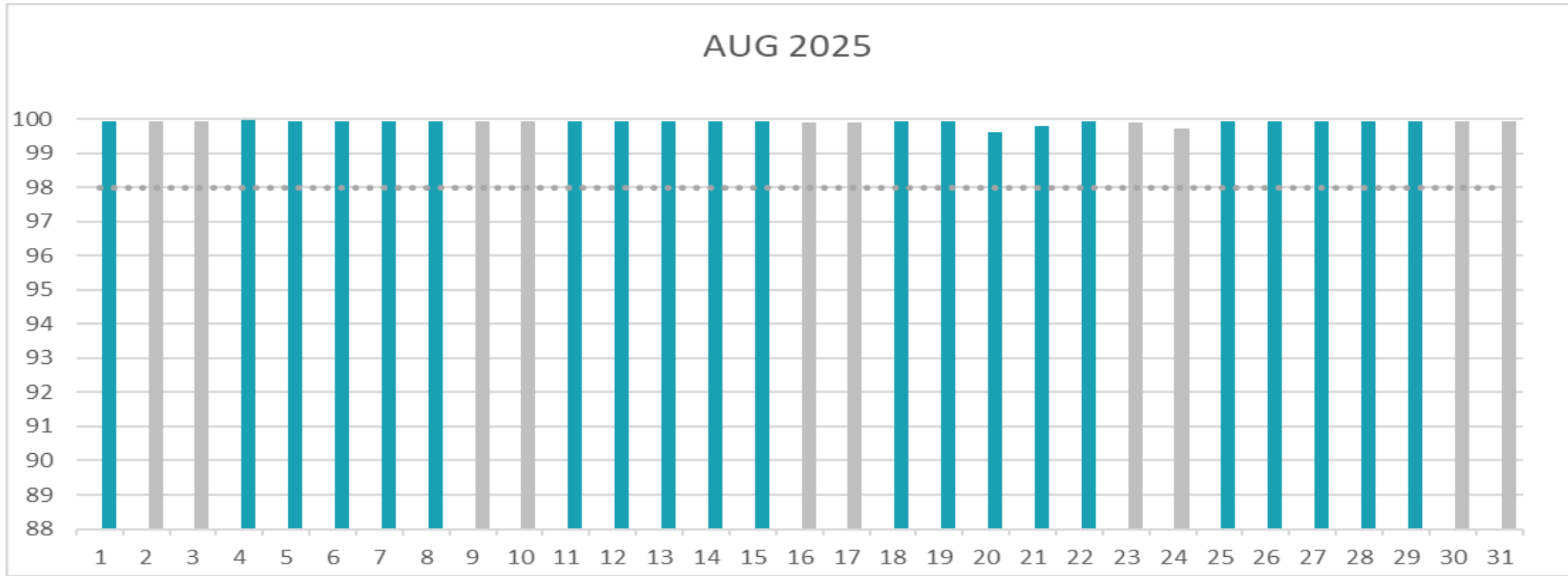| SLA #1:	Daily Online Transactions – inquiry screens (bounded)
Target:	98% with an average response time < 2 seconds
Actual:	**Exceeded daily online transaction (bounded) response time at no less than 99.91%** since January 2023. Measured daily and reported on Monthly.

Monthly View: Jan 2023 – Aug 2025
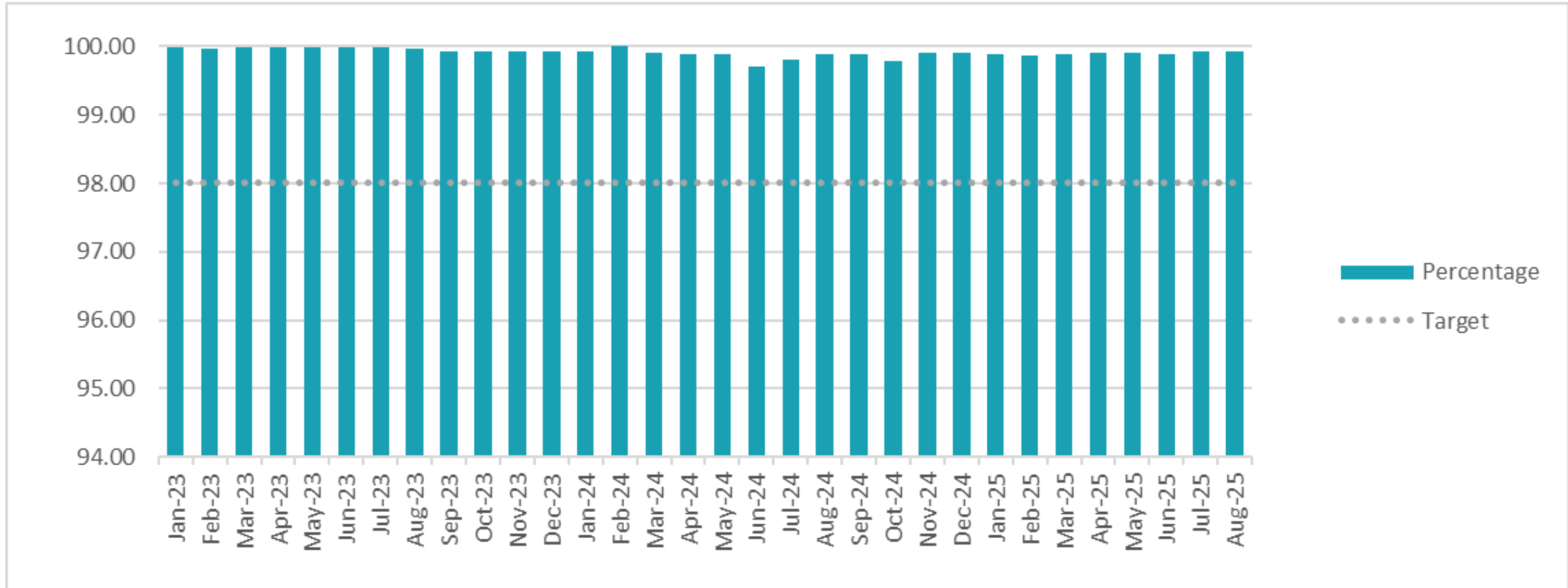
Daily View: Aug 2025

AUG 2025

Legend: Target Met | Target Not Met | Weekend

BenefitsCal Performance Metrics (continued)

SLA #2: Daily Online Transactions – inquiry screens (unbounded)
Target: 98% with an average response time <10 seconds
Actual: **Exceeded daily online transaction (unbounded) response time at no less than 99.93%** since January 2023.
Measured daily and reported on Monthly

SLAs and Performance

Monthly View: Jan 2023 – Aug 2025

Daily View: Aug 2025

BenefitsCal Performance Metrics (continued)

SLA #3: Daily BenefitsCal Hosted API Transactions
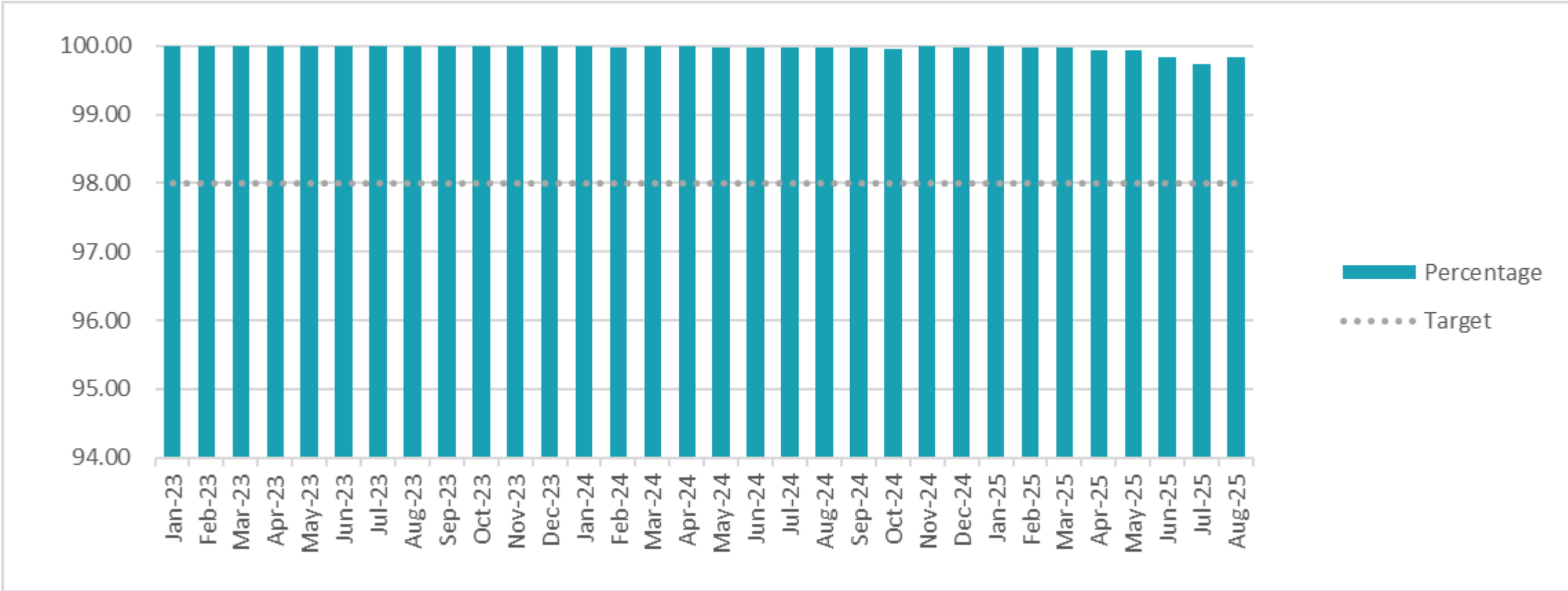**Target:** 98% with an average response time <2 seconds
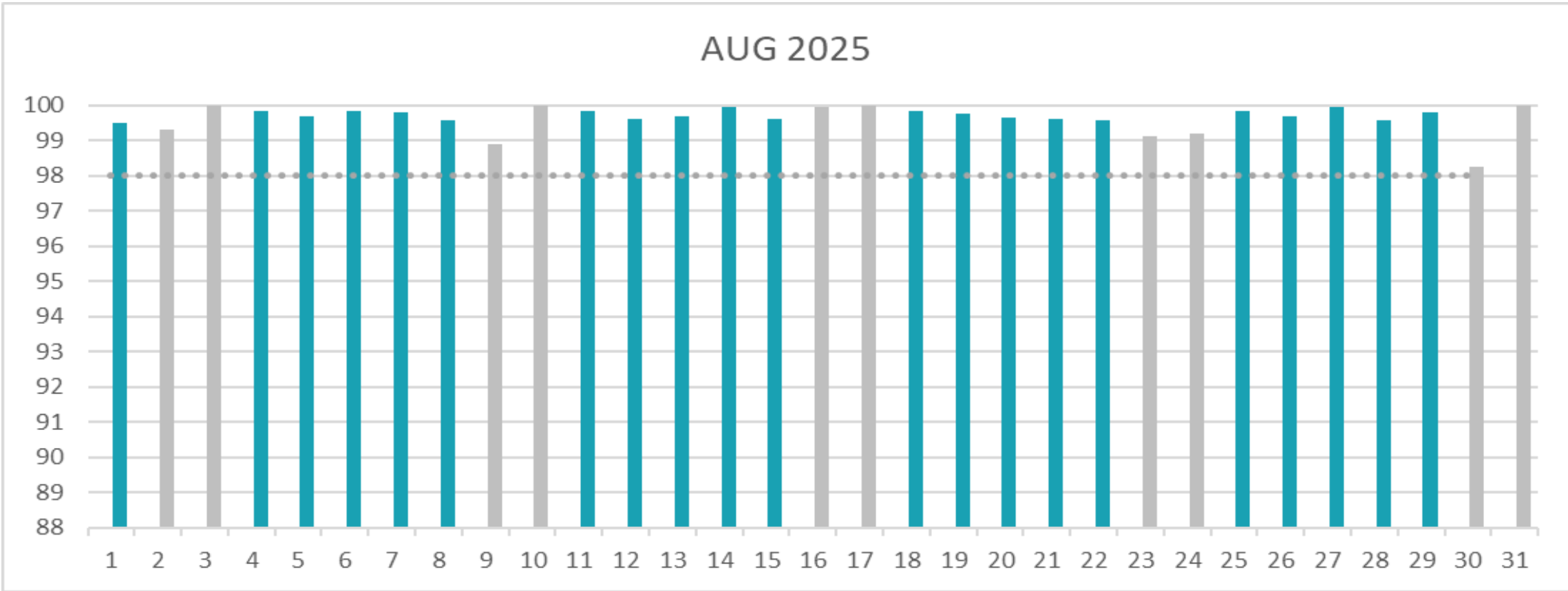**Actual:** **Exceeded daily API transaction response time at no less than 99.80%** since January 2023.
Measured daily and reported on Monthly

Monthly View: Jan 2023 – Aug 2025

Daily View: Aug 2025

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