

# JPA Board of Directors Meeting

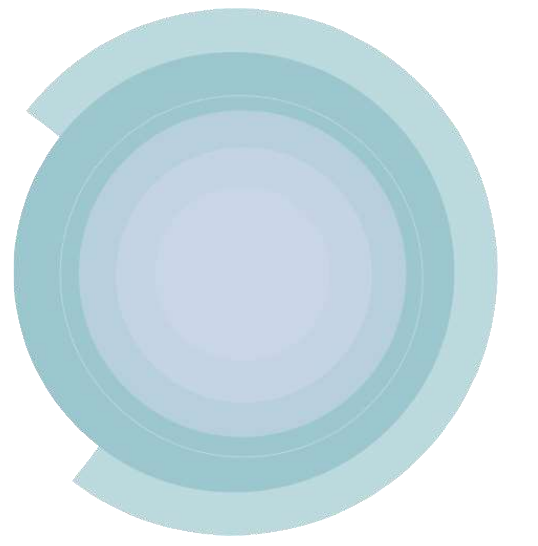
September 12, 2025



CalSAWS



# Agenda



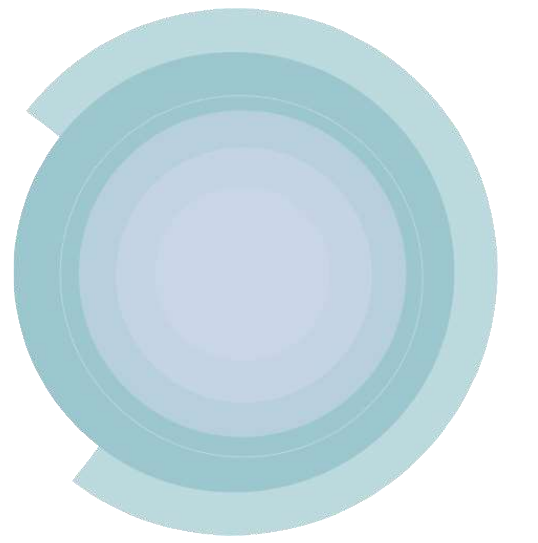
1. Call Meeting to Order.
2. Confirmation of Quorum and Agenda Review.
3. Public Comment: Public opportunity to speak on any item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

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.

All participants are muted upon entry to the Zoom Meeting. To unmute press \*6 on your phone and make sure your microphone is not muted within the Zoom application.

# CLOSED SESSION

# Action Items

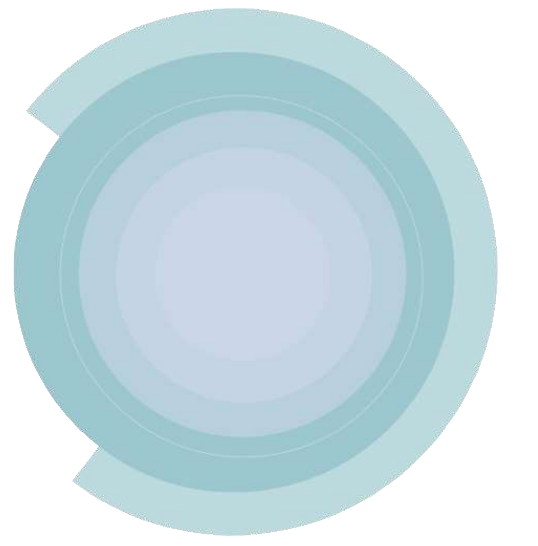


4. PUBLIC EMPLOYEE PERFORMANCE EVALUATION – EXECUTIVE DIRECTOR (Gov. Code §§ 54954.5(e), 54957(b)(1).)

**The JPA Board is in Closed Session and will return soon.**

# RECONVENE OPEN SESSION

# Informational Item

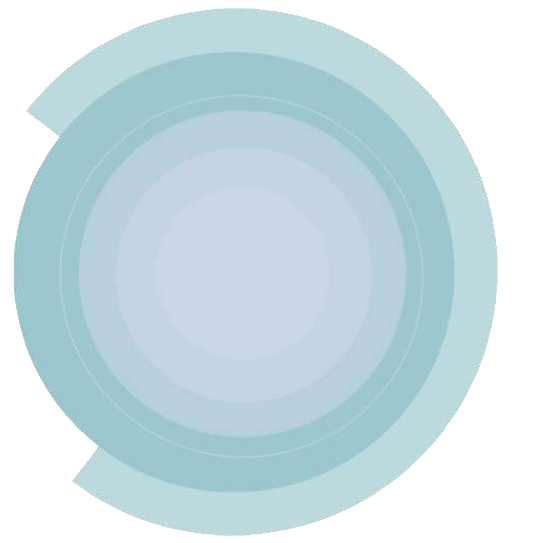


5. Announcement of action taken during Closed Session, if any.

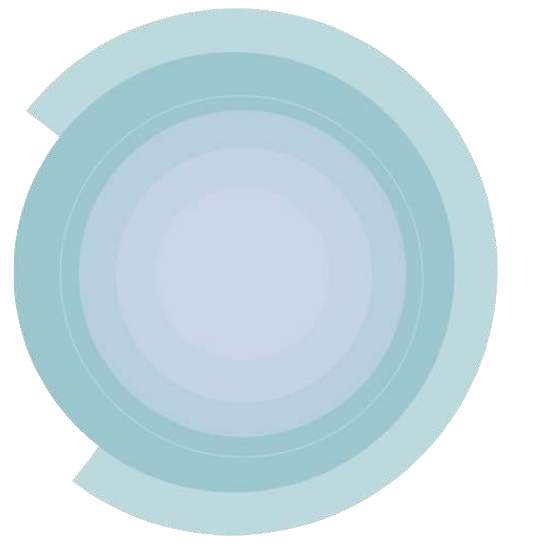
# Action Items

# Action Items

6. Approval of Resolution recognizing Thomas J. Hartman upon his retirement.



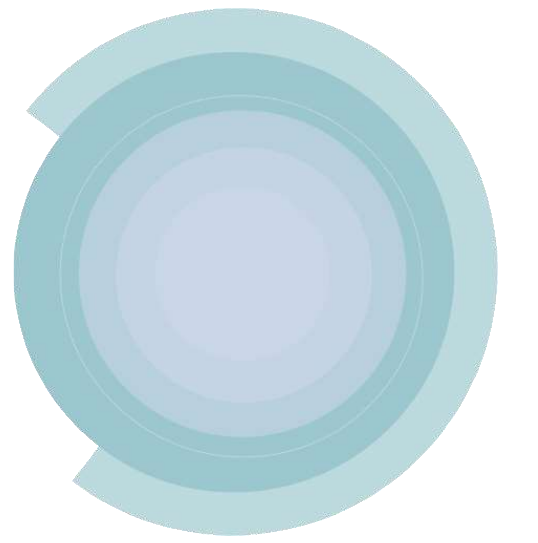
# Action Items



## 7. Approval of Consent Items:

- a. Approval of the Minutes and review of the Action Items from the July 18, 2025, JPA Board of Directors Meeting.
- b. Approval of the Privacy and Security Agreement (PSA) between the California Department of Social Services (CDSS) and the California Statewide Automated Welfare System (CalSAWS).
- c. Approval of Accenture Change Notice 42, which includes costs for additional Maintenance and Operations (M&O) hours, and one (1) county purchase.
- d. Approval of Gainwell Infrastructure Change Order 2, which includes seven (7) county purchases.

# Action Items



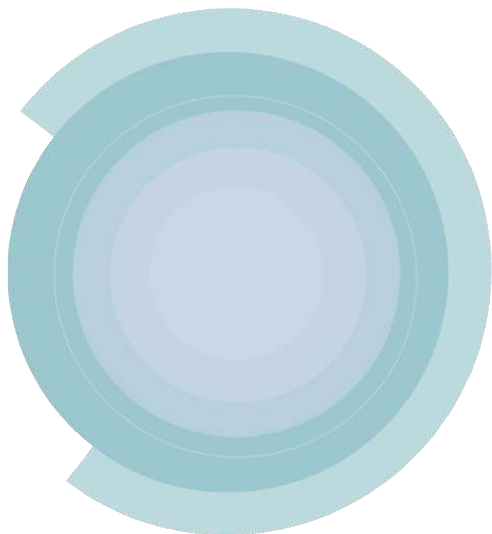
## 7. Approval of Consent Items (Continued):

- e. Approval of Deloitte Maintenance and Enhancement (M&E) Change Order 1 which includes one (1) premise item and one (1) county purchase.
- f. Approval of ClearBest Quality Assurance (QA) Work Order 4, which includes costs for additional QA Professional Services.

# Informational Items

# Quarterly Fiscal Report

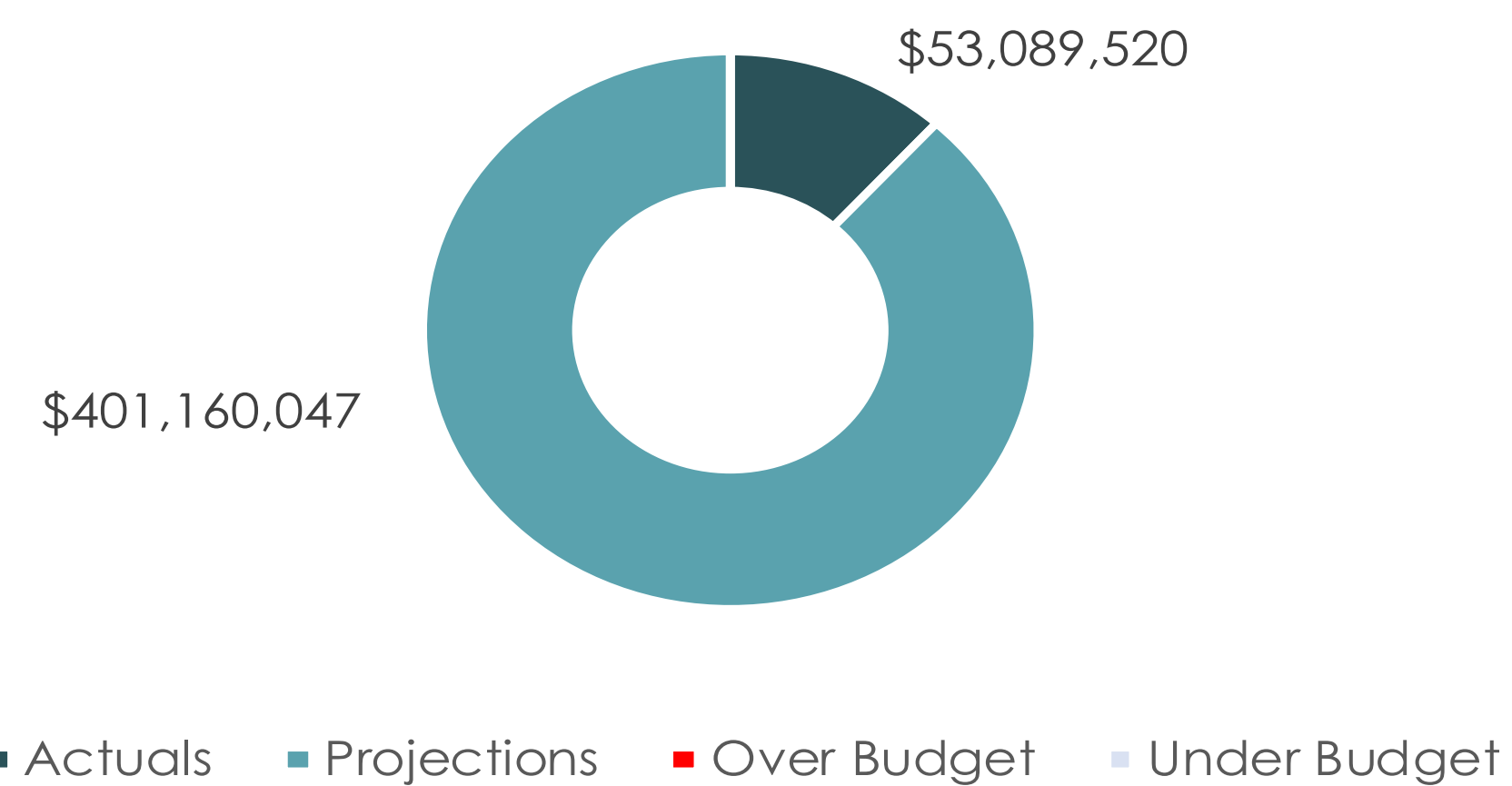
# CalSAWS Financial Update



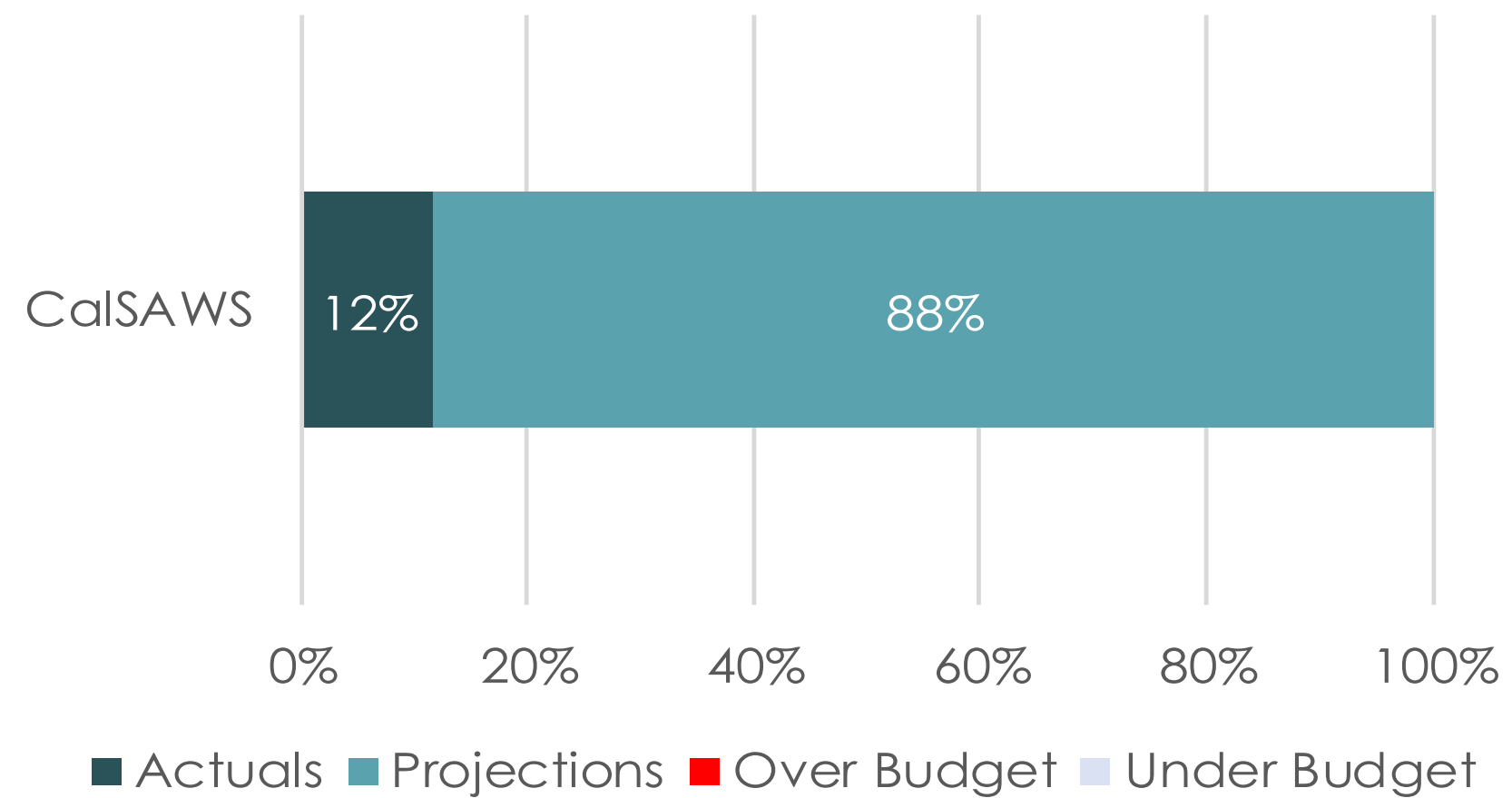
- 1 Actuals to Date  
Based on Vendor Invoices & County Claims
- 2 Projections (Estimates to Complete)  
Estimated Costs for Future Months
- 3 Estimate at Completion (EAC)  
Actual Costs Plus Estimated
- 4 Total Allocation/Budget  
Amount Allocated by Line Item for the Approved Budget
- 5 Balance  
Difference Between EAC and Budget  
Negative balance is over budget  
Positive balance is under budget
- 6 % Expended to Date (Actuals)  
Percent of Actuals to Date Divided by the Budget
- 7 % EAC to Budget  
Percent of EAC Divided by the Budget

# CalSAWS | SFY 2025/26 FINANCIAL DASHBOARD - September 5, 2025

## Total Actuals & Projections



## % Expended to Date



| Category                 | Actuals to Date <sup>1</sup> | Projections (ETC)    | EAC                  | Total Allocation (Budget) | Balance + Under / (-Over) | % Expended to Date | % EAC to Budget |
|--------------------------|------------------------------|----------------------|----------------------|---------------------------|---------------------------|--------------------|-----------------|
| <b>CalSAWS</b>           | <b>\$49,112,606</b>          | <b>\$339,332,762</b> | <b>\$388,445,368</b> | <b>\$388,445,368</b>      | <b>\$0</b>                | <b>12.6%</b>       | <b>100.0%</b>   |
| CalSAWS M&O              | \$47,988,482                 | \$335,709,801        | \$383,698,283        | \$383,698,283             | \$0                       | 12.5%              | 100.0%          |
| OCAT M&O                 | \$86,255                     | \$613,699            | \$699,954            | \$699,954                 | \$0                       | 12.3%              | 100.0%          |
| CalHEERS Interface       | \$760,336                    | \$2,606,032          | \$3,366,368          | \$3,366,368               | \$0                       | 22.6%              | 100.0%          |
| Covered CA CSC           | \$277,533                    | \$403,230            | \$680,763            | \$680,763                 | \$0                       | 40.8%              | 100.0%          |
| <b>CalSAWS Premise</b>   | <b>\$3,926,976</b>           | <b>\$61,090,756</b>  | <b>\$65,017,732</b>  | <b>\$65,017,732</b>       | <b>\$0</b>                | <b>6.0%</b>        | <b>100.0%</b>   |
| CalSAWS Premise          | \$3,926,976                  | \$61,090,756         | \$65,017,732         | \$65,017,732              | \$0                       | 6.0%               | 100.0%          |
| <b>JPA Admin. Budget</b> | <b>\$49,938</b>              | <b>\$736,529</b>     | <b>\$786,467</b>     | <b>\$786,467</b>          | <b>\$0</b>                | <b>6.3%</b>        | <b>100.0%</b>   |
| CalSAWS 58 Counties      | \$49,938                     | \$736,529            | \$786,467            | \$786,467                 | \$0                       | 6.3%               | 100.0%          |
| <b>Total</b>             | <b>\$53,089,520</b>          | <b>\$401,160,047</b> | <b>\$454,249,567</b> | <b>\$454,249,567</b>      | <b>\$0</b>                | <b>11.7%</b>       | <b>100.0%</b>   |

1. Actuals are based on planned invoices through September (partial) payment month

CalSAWS | SFY 2025/26 CONSORTIUM PERSONNEL BUDGET & FTEs

| CATEGORY                                         | Actuals to Date | Projections (ETC) | EAC          | Total Allocation (Budget) | BALANCE +Under / (-Over) | % Expended to Date | % EAC to Budget |
|--------------------------------------------------|-----------------|-------------------|--------------|---------------------------|--------------------------|--------------------|-----------------|
| CalSAWS M&O                                      | \$5,522,191     | \$25,489,215      | \$31,011,406 | \$31,011,406              | \$0                      | 17.8%              | 100.0%          |
| Consortium Personnel - County <sup>1</sup>       | \$773,218       | \$9,299,030       | \$10,072,248 | \$10,072,248              | \$0                      | 7.7%               | 100.0%          |
| Consortium Personnel - Contractor <sup>2,3</sup> | \$4,748,973     | \$16,190,185      | \$20,939,158 | \$20,939,158              | \$0                      | 22.7%              | 100.0%          |
| Total                                            | \$5,522,191     | \$25,489,215      | \$31,011,406 | \$31,011,406              | \$0                      | 17.8%              | 100.0%          |

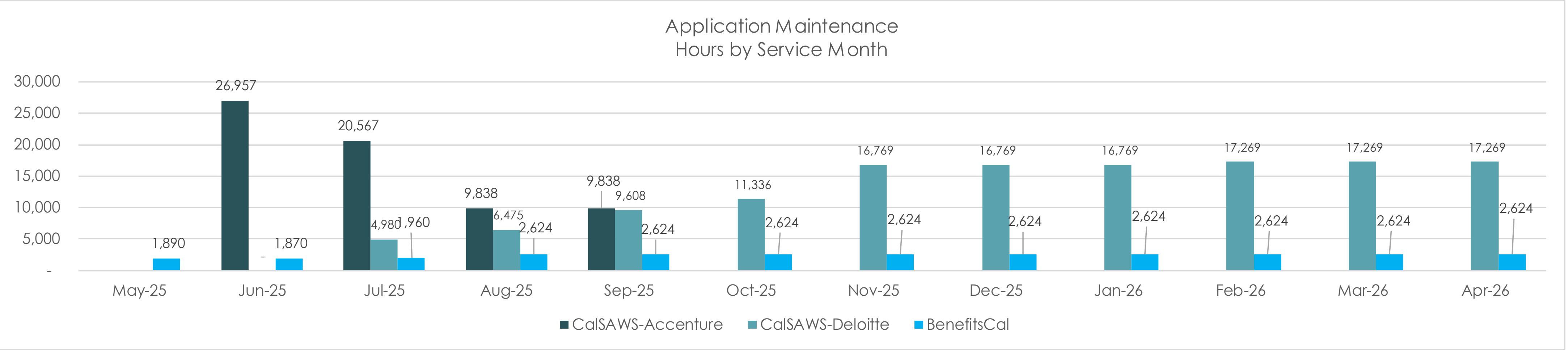
| SFY 2025/26 - Consortium Personnel FTE Counts      | FTE |
|----------------------------------------------------|-----|
| CalSAWS M&O Long-Term                              | 150 |
| Consortium Personnel - County <sup>1</sup>         | 46  |
| Consortium Personnel - Contractor <sup>2</sup>     | 93  |
| Consortium Personnel - Sub-Contractor <sup>3</sup> | 7   |
| TBD <sup>4</sup>                                   | 4   |
| CalSAWS Transition Limited-Term                    | 6   |
| Consortium Personnel - County <sup>1</sup>         | 0   |
| Consortium Personnel - Contractor <sup>2</sup>     | 6   |
| Consortium Personnel - Sub-Contractor <sup>3</sup> | 0   |
| TBD <sup>4</sup>                                   | 0   |
| Total                                              | 156 |

<sup>1</sup>Includes only Consortium Staff, does not include County Support Staff  
<sup>2</sup>Includes RGS and CSAC employees  
<sup>3</sup>Includes RGS Contractor Staff  
<sup>4</sup>Vacancies

CalSAWS | SFY 2025/26 CHANGE BUDGET (APPLICATION MAINTENANCE / M&E HOURS)

| Change Budget Category           | Actuals to Date | Projections (ETC) | EAC          | Total Allocation (Budget) | BALANCE +Under / (-Over) | % Expended to Date | % EAC to Budget |
|----------------------------------|-----------------|-------------------|--------------|---------------------------|--------------------------|--------------------|-----------------|
| CalSAWS M&O                      | \$11,277,069    | \$78,738,117      | \$90,015,186 | \$90,015,186              | \$0                      | 12.5%              | 100.0%          |
| CalSAWS M&E                      | \$6,438,376     | \$27,178,007      | \$33,616,383 | \$33,616,383              | \$0                      | 19.2%              | 100.0%          |
| CalHEERS Interface Change Budget | \$566,603       | \$1,847,934       | \$2,414,537  | \$2,414,537               | \$0                      | 23.5%              | 100.0%          |
| BenefitsCal                      | \$743,086       | \$2,595,797       | \$3,338,883  | \$3,338,883               | \$0                      | 22.3%              | 100.0%          |
| CalSAWS Premise                  | \$3,529,004     | \$47,116,379      | \$50,645,383 | \$50,645,383              | \$0                      | 7.0%               | 100.0%          |
| TOTAL                            | \$11,277,069    | \$78,738,117      | \$90,015,186 | \$90,015,186              | \$0                      | 12.5%              | 100.0%          |

CalSAWS | SFY 2025/26 APPLICATION MAINTENANCE HOURS BY MONTH & SYSTEM



| Service Month              | May-25 | Jun-25 | Jul-25 | Aug-25 | Sep-25 | Oct-25 | Nov-25 | Dec-25 | Jan-26 | Feb-26 | Mar-26 | Apr-26 | Total   |
|----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| CalSAWS - Accenture        | -      | 26,957 | 20,567 | 9,838  | 9,838  | 9,837  | -      | -      | -      | -      | -      | -      | 77,037  |
| Design & Build             |        | 14,672 | 10,098 | -      | -      | -      |        |        |        |        |        |        | 24,770  |
| Test                       |        | 7,480  | 5,359  | -      | -      | -      |        |        |        |        |        |        | 12,839  |
| Management & Other Support |        | 4,805  | 5,110  | -      | -      | -      |        |        |        |        |        |        | 9,915   |
| Projection                 |        | -      | -      | 9,838  | 9,838  | 9,837  |        |        |        |        |        |        | 29,513  |
| CalSAWS - Deloitte         | -      | -      | 4,980  | 6,475  | 9,608  | 11,336 | 16,769 | 16,769 | 16,769 | 17,269 | 17,269 | 17,269 | 134,513 |
| Design & Build             |        |        | 3,984  | -      | -      | -      | -      | -      | -      | -      | -      | -      | 3,984   |
| Test                       |        |        | 996    | -      | -      | -      | -      | -      | -      | -      | -      | -      | 996     |
| Management & Other Support |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -       |
| Projection                 |        |        | -      | 6,475  | 9,608  | 11,336 | 16,769 | 16,769 | 16,769 | 17,269 | 17,269 | 17,269 | 129,533 |
| BenefitsCal - Deloitte     | 1,890  | 1,870  | 1,960  | 2,624  | 2,624  | 2,624  | 2,624  | 2,624  | 2,624  | 2,624  | 2,624  | 2,624  | 29,336  |
| Design & Build             | 1,040  | 1,029  | 1,078  | -      | -      | -      | -      | -      | -      | -      | -      | -      | 3,147   |
| Test                       | 472    | 467    | 490    | -      | -      | -      | -      | -      | -      | -      | -      | -      | 1,429   |
| Management & Other Support | 378    | 374    | 392    | -      | -      | -      | -      | -      | -      | -      | -      | -      | 1,144   |
| Projection                 | -      | -      | -      | 2,624  | 2,624  | 2,624  | 2,624  | 2,624  | 2,624  | 2,624  | 2,624  | 2,624  | 23,616  |
| COMBINED TOTAL             | 1,890  | 28,827 | 27,507 | 18,937 | 22,070 | 23,797 | 19,393 | 19,393 | 19,393 | 19,893 | 19,893 | 19,893 | 240,886 |

**NOTES:**  
Accenture's May 2025 Services for CalSAWS were paid in June and therefore not applicable to current SFY.  
Additional client correspondence hours ended in prior year and are no longer applicable.  
Accenture hours include offshore "no-cost" hours.  
Excludes CalHEERS and separate premise hours which are restricted to specific scope.  
Production & Operation Hours (e.g. M&O - service desk, network, etc.) are not related to application changes and therefore not included.

| Warranty & Liquidated Damages Detail |               |          |               |           |
|--------------------------------------|---------------|----------|---------------|-----------|
| Category                             | Service Month | Amount   | Invoice Month | Invoice # |
| Hyland                               | May-25        | \$5,000  | TBD           | TBD       |
| Incident Notification                | June-25       | \$30,000 | TBD           | TBD       |
| Hyland                               | July-25       | \$30,769 | TBD           | TBD       |
|                                      |               |          |               |           |
| Total                                |               | \$65,769 |               |           |

| Accenture Change Notices                                     | Total Amount  | Change Notice Ref. |
|--------------------------------------------------------------|---------------|--------------------|
| Total Baseline Allocation (Amendment 33)                     | \$142,257,479 |                    |
| Previously Approved through May 2025                         | \$121,362,315 | FIVE - THIRTY-NINE |
| Fiscal Year Shift and Reconciliation for prior Premise Items | (\$1,945,887) | FORTY-ONE          |
| Additional M&O Services                                      | \$455,882     | FORTY-TWO*         |
| Total Allocated Amounts                                      | \$119,872,310 |                    |
| Total Remaining Allocation                                   | \$22,385,169  |                    |

| Accenture County Purchases               | Total Amount | Change Notice Ref. |
|------------------------------------------|--------------|--------------------|
| Total Baseline Allocation (Amendment 33) | \$35,000,000 |                    |
| Previously Approved through May 2025     | \$24,523,155 | FIFTEEN - FORTY    |
| Approved County Purchases                | \$1,105,996  | FORTY-ONE          |
| Approved County Purchases                | \$127,722    | FORTY-TWO*         |
| Total Allocated Amounts                  | \$25,756,873 |                    |
| Total Remaining Allocation               | \$9,243,127  |                    |

| ClearBest                                  | Total Amount | Work Order Ref.    |
|--------------------------------------------|--------------|--------------------|
| Total Baseline Allocation (Change Order 9) | \$8,829,000  |                    |
| Previously Approved through May 2025       | \$4,373,531  | CO 8 ONE - CO9 TWO |
| SFY 25/26 for prior approved Premise Items | \$1,835,159  | CO9 THREE          |
| Additional Project Management Services     | \$766,596    | CO9 FOUR*          |
| Total Allocated Amounts                    | \$6,975,286  |                    |
| Total Remaining Allocation                 | \$1,853,714  |                    |

| Gainwell Infrastructure Change Notices/County Purchases | Total Amount | Contract Ref. |
|---------------------------------------------------------|--------------|---------------|
| Total Baseline Allocation (Amendment ONE)               | \$33,518,403 |               |
| Approved County Purchases                               | \$375,249    | CO ONE        |
| Approved County Purchases                               | \$496,444    | CO TWO*       |
| Total Allocated Amounts                                 | \$871,693    |               |
| Total Remaining Allocation                              | \$32,646,710 |               |

| Gainwell Central Print (County Purchases) | Total Amount | Change Order Ref. |
|-------------------------------------------|--------------|-------------------|
| Total Baseline Allocation                 | \$9,000,000  |                   |
| Previously Approved through May 2025      | \$229,515    | ONE-TWO           |
| Approved County Purchases                 | \$685,536    | FOUR              |
| Total Allocated Amounts                   | \$915,051    |                   |
| Total Remaining Allocation                | \$8,084,949  |                   |

| Gainwell Central Print Change Orders             | Total Amount | Contract Ref. |
|--------------------------------------------------|--------------|---------------|
| Total Baseline Allocation (Change Order FOUR)    | \$19,975,938 |               |
| Previously Approved through May 2025             | \$356,300    | CO ONE        |
| Alternate Formats                                | \$3,951,899  | CO THREE      |
| CalFresh Notice from CF Restaurant Meals Program | \$179,016    | CO FOUR       |
| CalFresh/CalWORKs Recertification Packets        | \$580,225    | CO FOUR       |
| Total Allocated Amounts                          | \$5,067,440  |               |
| Total Remaining Allocation                       | \$14,908,498 |               |

| Deloitte Portal/Mobile                     | Total Amount | Work Order Ref. |
|--------------------------------------------|--------------|-----------------|
| Total Baseline Allocation (Change Order 8) | \$33,000,000 |                 |
| Previously Approved through May 2025       | \$13,789,503 | ONE - EIGHTEEN  |
| NIST 800-53 Rev. 5 Initiatives             | \$1,890,334  | NINETEEN        |
| Total Allocated Amounts                    | \$15,679,837 |                 |
| Total Remaining Allocation                 | \$17,320,163 |                 |

| Deloitte M&E                            | Total Amount | Contract Ref. |
|-----------------------------------------|--------------|---------------|
| Total Baseline Allocation (Amendment 1) | \$60,842,031 |               |
| Approved Premise Item                   | \$727,835    | CO ONE*       |
| Total Allocated Amounts                 | \$727,835    |               |
| Total Remaining Allocation              | \$60,114,196 |               |

| Deloitte M&E County Purchases | Total Amount | Contract Ref. |
|-------------------------------|--------------|---------------|
| Total Baseline Allocation     | \$20,000,000 |               |
| Approved County Purchase      | \$123,860    | CO ONE*       |
| Total Allocated Amounts       | \$123,860    |               |
| Total Remaining Allocation    | \$19,876,140 |               |

\*Assumes JPA Board approval in September

# Policy & Release Update

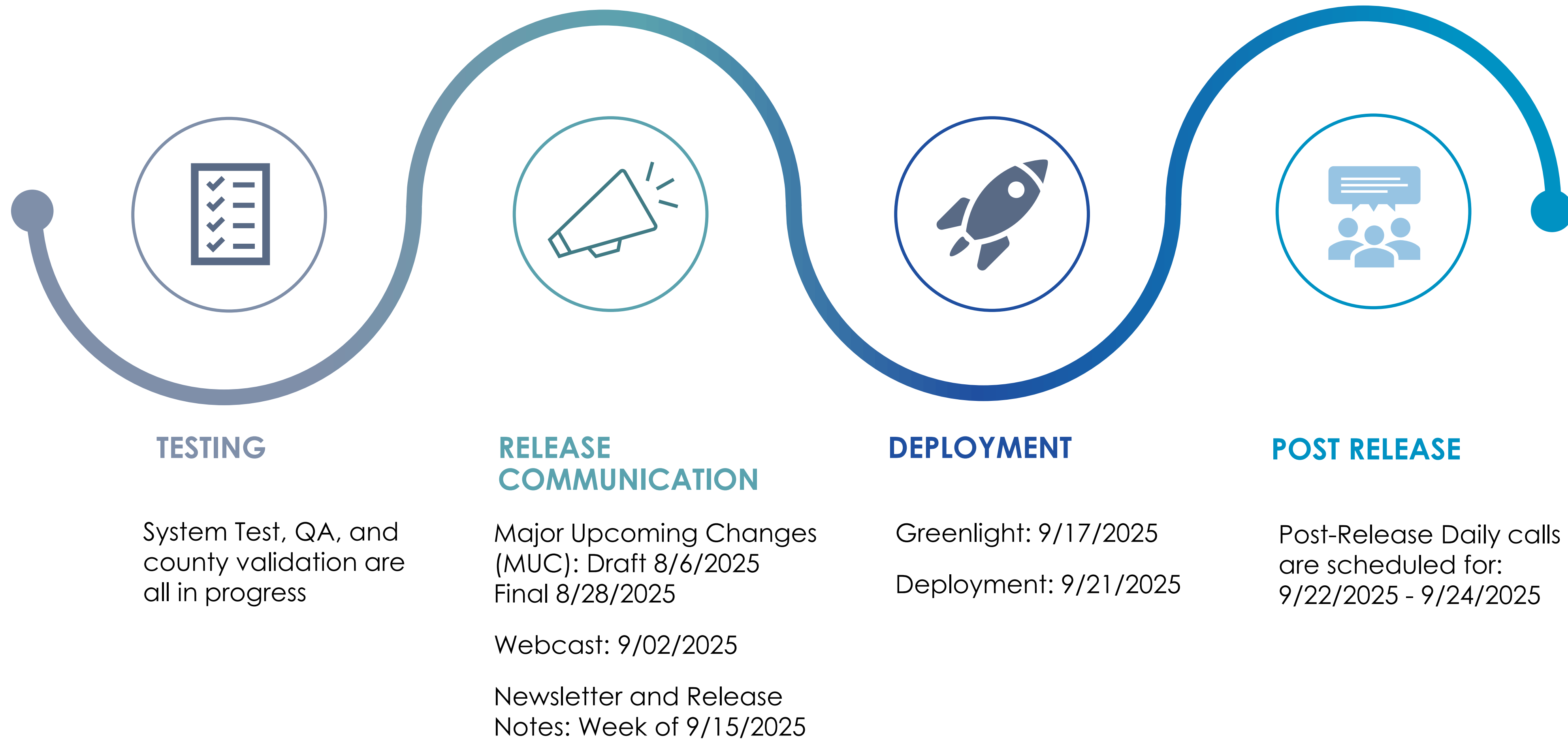
# Release and Policy Update

## Upcoming Releases

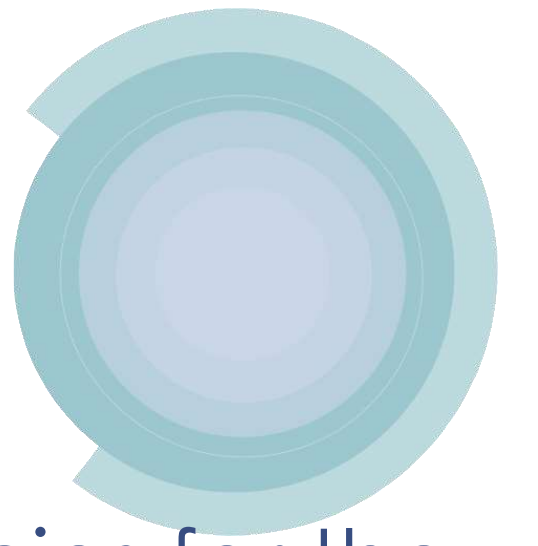
| September<br>Baseline (9/22/2025)<br>and Priority Releases                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | October<br>Priority Releases                                                                                                                 | November<br>Baseline (11/24/2025)<br>and Priority Releases                                                                                                                                                                                                                                                                                                                                                                                                | December<br>Priority Releases                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>9/4/2025:</b></p> <ul style="list-style-type: none"><li>• 2025-2026 CalFresh COLA and CalWORKs IRT Levels for 2025-2026</li></ul> <p><b>9/13/2025:</b></p> <ul style="list-style-type: none"><li>• 2025-2026 CalFresh COLA and CalWORKs IRT - EDBC Batch Run</li></ul> <p><b>9/22/2025:</b></p> <ul style="list-style-type: none"><li>• Send MEDS Non-Extended Aid Codes For Foster Care &amp; Kin-GAP Infants</li><li>• 2025 Updates to the Single Streamlined Application</li></ul> <p><b>9/XX/2025:</b></p> <ul style="list-style-type: none"><li>• ACL 25-50 H.R. 1 Limits to Standard Utility Allowance Subsidy</li></ul> | <p><b>10/02/2025:</b></p> <ul style="list-style-type: none"><li>• Generate No Change NOA for CalWORKs Voluntary Mid-Period Actions</li></ul> | <p><b>11/24/2025:</b></p> <ul style="list-style-type: none"><li>• SB 600 - ACL 25-01 - CalFresh Minimum Benefit Adequacy Act of 2023</li><li>• 2026 Social Security Title II and Title XVI Cost of Living Adjustments (SSA COLA)</li><li>• WIC 11203(a) - Apply SSP Only OPA for Specific Programs</li><li>• ACWDL 18-02E - Update ICT Document Category Type to Include MC RE Packets</li><li>• ACL 25-XX - Resource Limit Increase for CW/RCA</li></ul> | <p><b>12/06/2025:</b></p> <ul style="list-style-type: none"><li>• Batch EDBC to apply 2026 SSA Cost of Living Adjustments (COLA)</li></ul> <p><b>12/21/2025:</b></p> <ul style="list-style-type: none"><li>• ACWDL 25-14: Reinstatement of Asset Limit Test for Non-MAGI Medi-Cal</li><li>• ACWDL 25-13: Medi-Cal Adult Expansion Freeze for 19 and Older without Satisfactory Immigration Status</li></ul> |

# Release and Policy Update

Upcoming Releases – 25.09



# HR 1 Introduction

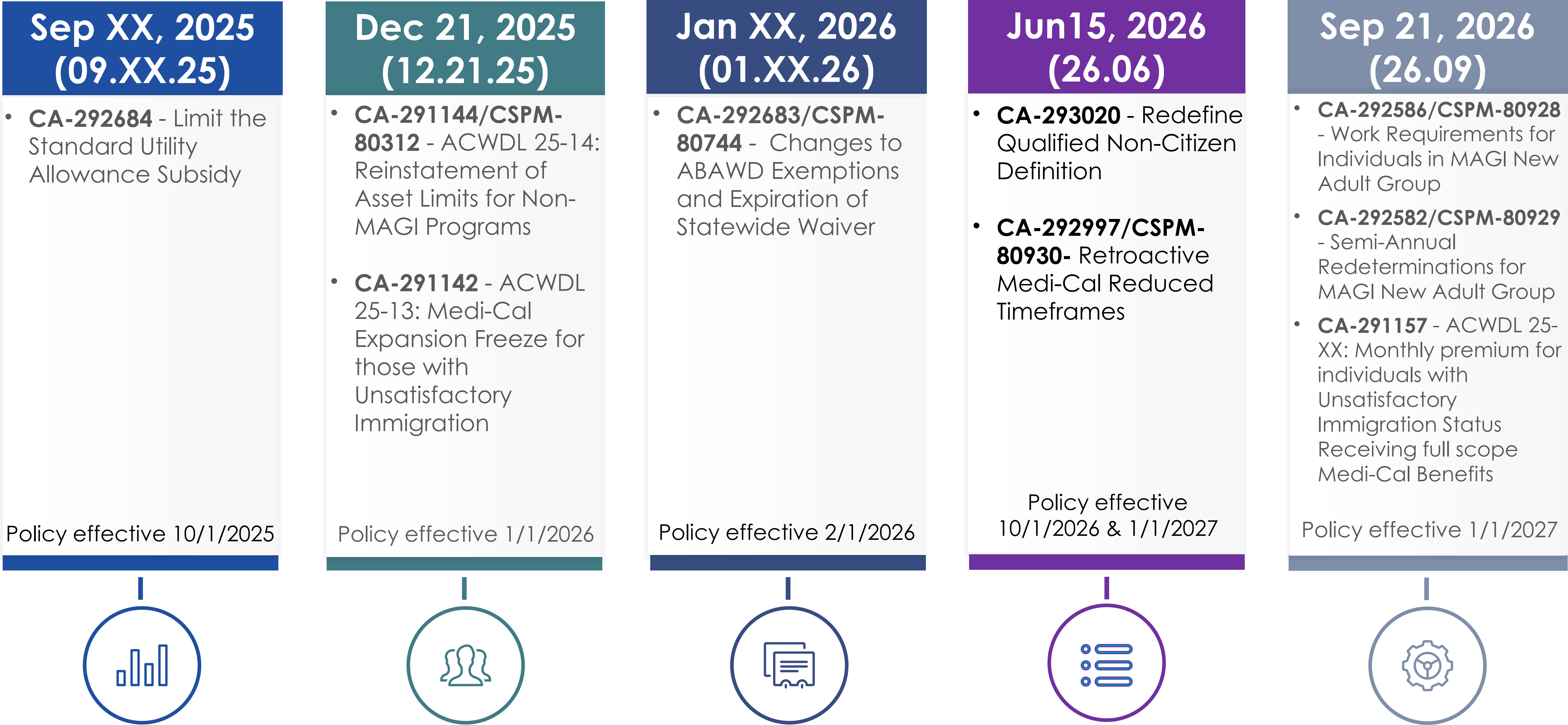


**HR 1**, signed into law on July 4, 2025, makes major changes to Medi-Cal (MC) and updates policies for the Affordable Care Act marketplaces and the Supplemental Nutrition Assistance Program (SNAP).

As it relates to CalSAWS, here's what we know as of 9/4/2025:

- **CalFresh:**
  - The ABAWD policy effective date is February 1, 2026, while the remaining HR 1 effective dates have not yet been determined.
  - 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 1 Policy Roadmap\*



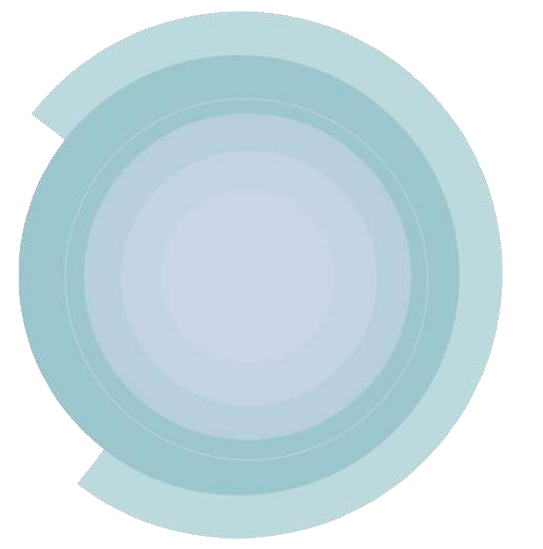
# May Revise & HR 1 Policy Roadmap\*



*\*Target releases are subject to change.*

# May Revise & HR 1 Policy Roadmap

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

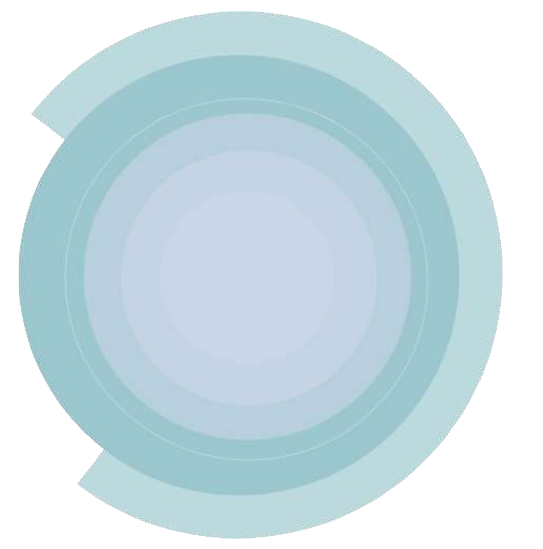


DHCS and CalSAWS are planning to hold the following sessions for the DHCS County Workgroup:

- 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 1 Policy 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.

# CalSAWS Priorities

# Situation

- HR 1 has created urgent and ongoing reporting and automation needs for counties. Counties are being asked daily for data by their Boards, the State and community stakeholders, while also managing compliance risks and operational workload pressures. Two critical areas have emerged where CalSAWS support is most urgently needed: reporting and automation specific to CalFresh error rate.
- Some data is already available in CalSAWS, but not consistently accessed, while gaps remain in areas critical to counties. Without a coordinated approach, counties risk developing multiple ad hoc solutions, leading to duplication, inconsistency, and inequity across the state.

# Background

- CalSAWS is in the middle of a major vendor transition, which constrains flexibility in redirecting technical resources. The BCR process was designed to structure long-term enhancements, but counties have emphasized that HR 1 demands both near-term support and broader automation to relieve pressure. Several counties and regions have already developed thoughtful business cases through the BCR process, demonstrating engagement in a more structured prioritization framework. At the same time, Board leadership has expressed concerns about timing of and need to re-direct resources and focus to meet the HR 1 requirements, underscoring the need for clarity in how priorities are set.

# Assessment

- Counties urgently need near-term reporting support to respond to HR 1 questions and plan for service impacts.
- The Counties and State also need automation tools that reduce error rates, improve accuracy, and ease compliance risks.
- CalSAWS has expertise to convene policy, data, and technical experts to identify both reporting and automation solutions.
- Technical capacity is constrained due to the vendor transition and current workload (see next slide on Infrastructure-related projects).
- Without clear JPA direction, staff will continue to receive CERs, enhancement requests, and direct county requests – creating duplication and risk.
- The key issue is not whether reporting and automation should move forward, but what existing work must pause or shift to make room for them.

# Infrastructure – Efforts Underway that Must Continue

- Major Projects
  - Hyland Migration
  - Identity Access Management
  - Oracle DB@AWS
  - Contact Center Modernization
- Software Replacement
  - Nuance Gatekeeper
  - Responsive Voice
- Software end of life/upgrade projects
  - Security software (multiple)
  - Amazon/Red Hat Linux and Oracle Apex/Linux
  - Weblogic
  - OpenText

# Priorities 1 and 2: Reporting & Data Architecture

Counties require consistent, reliable, and accessible reporting to respond to HR 1 demands. Immediate priorities include:

- Catalog existing reports and provide training for consistent use
- **Identify urgent gaps in HR 1-related data**
  - ❖ Provide short-term solutions such as statewide dashboards, ad hoc extracts, or interim datasets
- **Build longer-term, self-service reporting solutions into the pipeline (data lakehouse)**

# Priorities 3, 4, and 5: Automation

Beyond reporting, automation is critical to reducing workload and compliance risks. Counties need system support to reduce manual processes and improve accuracy, particularly in CalFresh. Key priorities include:

- **Income Verification Effort**
- **Additional tools to reduce CalFresh error rates**
  - ❖ Enhanced case processing tools to minimize clerical errors
  - ❖ Automated verification and validation steps
  - ❖ System alerts and dashboards to track error trends in real time
- **ABWAD-Adjacent Tools (if applicable)**

# Recommendation – Start. Stop. Pause.

Recommend that the JPA Board:

- 1. Affirm both HR 1 reporting and automation as immediate priorities for CalSAWS*
- 2. Direct staff to convene special workgroups for the above-mentioned priorities*
- 3. Pause most efforts that are not tied to HR1 priorities to ensure that proper bandwidth is available for rapid design and development.*

# How will we assess the Start. Pause. Stop?

- Is there a policy requirement with implementation by a specific date?
- Is it a critical technical project in flight, and pausing or reversing it would create more disruption than completing it?
- Does it directly and positively impact an HR1 objective?
- Is there demonstrable likelihood that it will positively impact CalFresh error rates?
- Is it necessary and efficient to respond to a Federal or State reporting/information requirements?

# Committee and Design Work – Start. Pause. Stop.

- Committees and RMs will be leveraged to gather SMEs for priority workgroups.
  - CRFIs for workgroup volunteers will be sent next week.
- Existing SCRS that support HR 1 efforts will be prioritized (see next slides).
- The Project is reviewing prioritized SCRs and will be pausing work on any that may increase CalFresh errors. For example, CA- 234705, which would allow users to add and modify the household change apply date.
- CERs/Committee/Workgroup Efforts that do not meet the criteria in the prior slide will be paused to redirect resources to critical, and rapid, design work that is needed.

# Committee and Design Work – Start. Pause. Stop.

CalFresh SCRs In Progress, which may Improve the Error Rate

| January<br>Baseline Release                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | March<br>Baseline Release                                                                                                                                                                                                                                                                                                                                                                                                | May<br>Baseline Release                                                                                                                                                                                                               | November<br>Baseline Release                                                                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1/26/2026:</b> <ul style="list-style-type: none"><li>1. Add CF Negative Action reason of 'Not a Separate Household'</li><li>2. ACIN I-15-23 Shelter Deductions/Utilities/Ho meless Shelter Deduction</li><li>3. ACIN I-16-05/ACL 24-23 Impact On CF Ols</li><li>4. Default the System to Select All Programs When Running EDBC</li><li>5. Do Not Generate CF 377.1A for Other Reasons When CF Intake Application is Denied for Missed Interview</li><li>6. Update ESAP SARN logic to remove RE length criteria</li></ul> | <b>3/23/2026:</b> <ul style="list-style-type: none"><li>1. Update EDBC to Ignore 10 Day Logic for Changes During CalWORKs and CalFresh Intake Months</li><li>2. Update NOA Suppression logic for Multi-Month EDBC for CalFresh</li><li>3. Update CW in Public Assistance CalFresh Budget at Initial Approval</li><li>4. Automated Processing of Payment Verification System (PVS) Abstract Data and Batch EDBC</li></ul> | <b>5/18/2026:</b> <ul style="list-style-type: none"><li>1. ACL 21-13 - ACL 21-117E - CF Medical Expense Deduction for Elderly or Disabled Household Members</li><li>2. Update CW/CF Proof of Name/Identity Regarding Adults</li></ul> | <b>11/23/2026:</b> <ul style="list-style-type: none"><li>1. Phase III - Modify and Add Validations to run EDBC for the Correct RE/SAR Submit Month</li></ul> |

# BenefitsCal – Pause. Stop.

The below items are priority items and items that would be paused.

## Priority Items

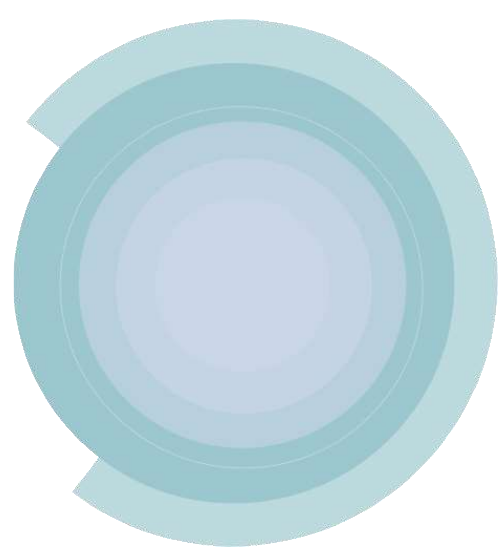
- ABAWD Requirements (new CF377.11E)
- Work requirements for Medi-Cal (Support Requests & Dashboard)
- Expansion Freeze Alien Eligibility Changes to BenefitsCal
- Retro-active Medi-Cal Changes (changing 3 months to 1 month)
- Adding a Medi-Cal Semi Annual Report
- Income Verification Tool (pending)

## Items that would be paused in order

- Browser Back Button
- Email Notifications
- Navigate Application Flow by Section
- Production Priority - EBT Phase 2
- Production Priority- Help Center Changes  
(Note: Help center Research is not impacted, only implementation when research is completed)

# BenefitsCal Update

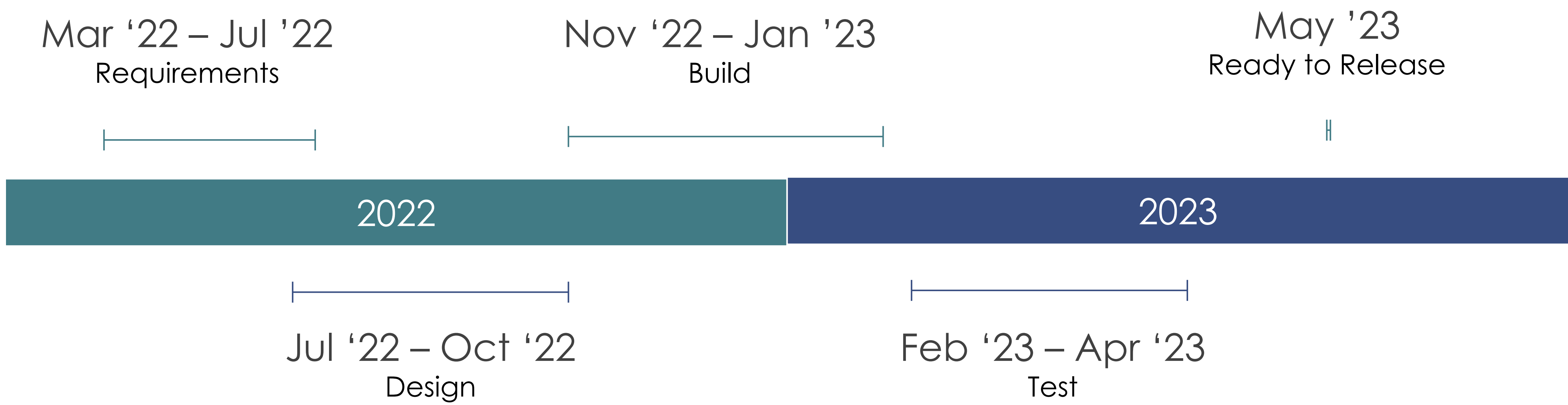
# Release of Information - Prior Implementation and Timeline



## Summary of Implementation:

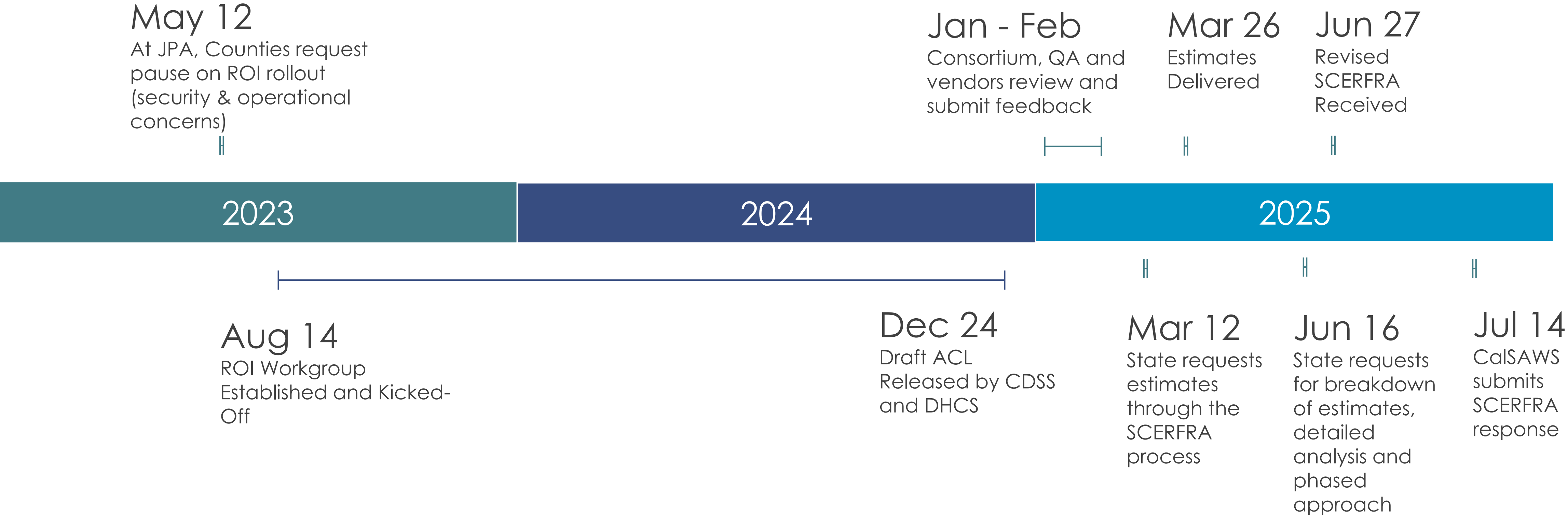
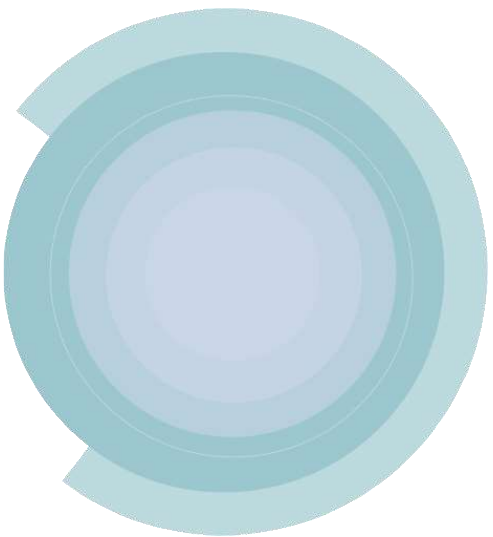
- Ability for Customers and CBOs to submit ABCDM 229s through BenefitsCal.
- Ability for Customers to view ROI details and CBOs to view customer case details released.
- Ability for Customers to revoke and manage ROIs.
- Ability for Counties to manage ROIs in CalSAWS.
- APIs to support data transfer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

## Implementation Timeline:



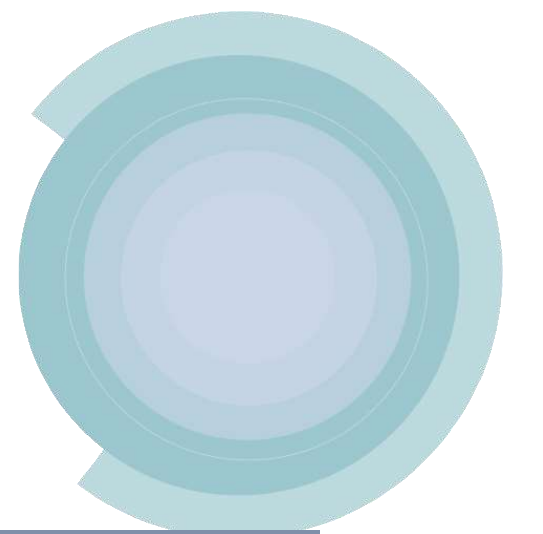
# Key Events

## 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

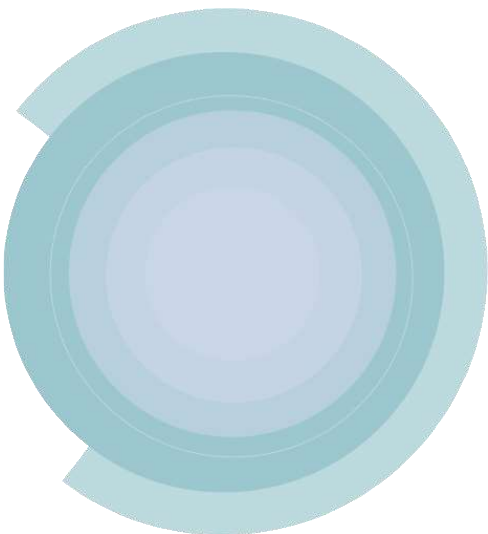
1. Update CalSAWS to capture ABCDM 229 for CBOs that do not have a BenefitsCal Account.
2. Update CalSAWS to nudge and search for pending ROIs at the time of renewals, re-applications and for ESAP households.

~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



## 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*

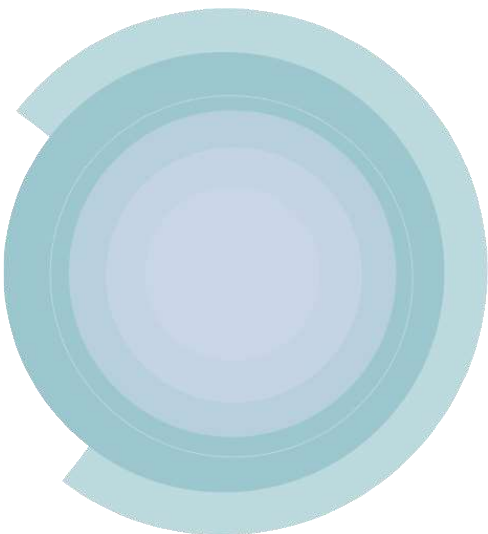
## WHAT WE DID

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**



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

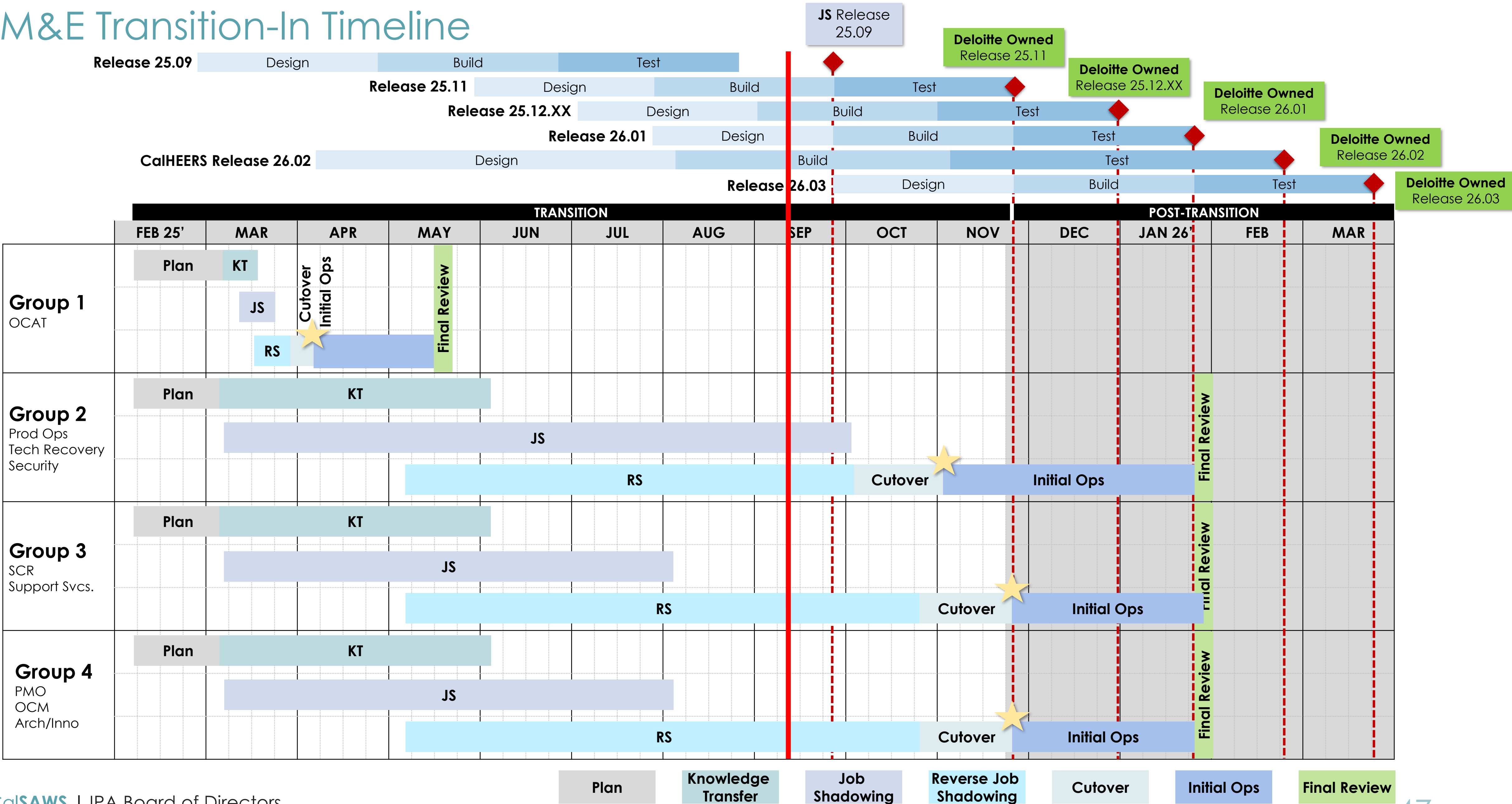
|                          |    |
|--------------------------|----|
| No. of Inquiries in May  | 12 |
| No. of Inquiries in June | 1  |

ALWAYS-ON SURVEY FINDINGS PERTAINING TO EBT

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

# Transition Update

# M&E Transition-In Timeline



# M&E Transition Cutover Progress and Status

As of: 9/3/2025

## M&E Transition Progress



## M&E Transition Cutover Status



# M&E Release Dashboard

As of: 9/3/2025



Not Started



In Progress



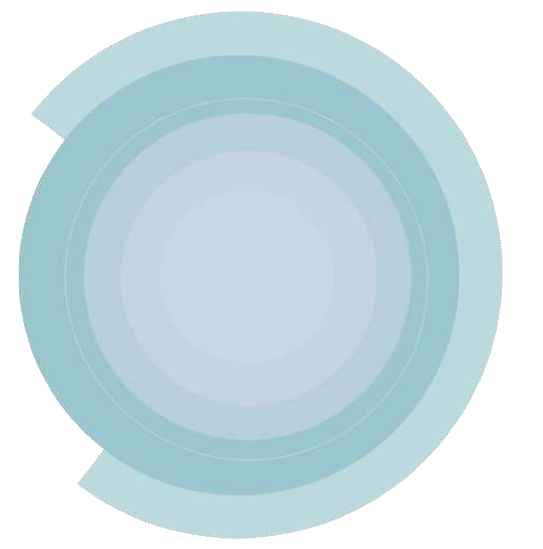
Complete

## Release Status

## Notes

|                                  |        |                                                 | % Complete |                                                                                                                                                                                                                                                      |
|----------------------------------|--------|-------------------------------------------------|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 25.11<br>11/22/2025<br>21 SCRs   | DESIGN | <div><div>5</div><div>16</div></div>            | 76%        | <ul style="list-style-type: none"><li>Coordinating to finalize design approvals.</li><li>Design is in-progress for newly added SCRs.</li><li>Build is in-progress for the approved SCRs.</li><li>Coordinating with teams to begin testing.</li></ul> |
|                                  | BUILD  | <div><div>8</div><div>5</div><div>8</div></div> | 38%        |                                                                                                                                                                                                                                                      |
|                                  | TEST   | <div><div>13</div><div>8</div></div>            | 0%         |                                                                                                                                                                                                                                                      |
| 25.12.06<br>12/06/2025<br>5 SCRs | DESIGN | <div><div>5</div></div>                         | 0%         | <ul style="list-style-type: none"><li>Worked with the Consortium to consolidate the year end calendar activities(including SSA COLA).</li><li>Designs are In-Progress.</li></ul>                                                                     |
|                                  | BUILD  | <div><div>5</div></div>                         | 0%         |                                                                                                                                                                                                                                                      |
|                                  | TEST   | <div><div>5</div></div>                         | 0%         |                                                                                                                                                                                                                                                      |
| 25.12.21<br>12/21/2025<br>6 SCRs | DESIGN | <div><div>4</div><div>2</div></div>             | 33%        | <ul style="list-style-type: none"><li><u>DHCS</u> walkthrough complete for the May Revise SCRs and submitted to the Committee on 08/22 with feedback due on 9/8.</li></ul>                                                                           |
|                                  | BUILD  | <div><div>6</div></div>                         | 0%         |                                                                                                                                                                                                                                                      |
|                                  | TEST   | <div><div>6</div></div>                         | 0%         |                                                                                                                                                                                                                                                      |
| 26.01<br>1/25/2026<br>52 SCRs    | DESIGN | <div><div>4</div><div>48</div></div>            | 0%         | <ul style="list-style-type: none"><li>14 SCRS are ready for Committee and the design BA reviews are in-progress for the rest.</li><li>Design drafts are in progress for the newly added SCRs.</li></ul>                                              |
|                                  | BUILD  | <div><div>52</div></div>                        | 0%         |                                                                                                                                                                                                                                                      |
|                                  | TEST   | <div><div>52</div></div>                        | 0%         |                                                                                                                                                                                                                                                      |
| 26.02<br>2/22/2026<br>3 SCRs     | DESIGN | <div><div>1</div><div>2</div></div>             | 0%         | <ul style="list-style-type: none"><li>Designs submitted, CCB approval due on 09/05.</li></ul>                                                                                                                                                        |
|                                  | BUILD  | <div><div>3</div></div>                         | 0%         |                                                                                                                                                                                                                                                      |
|                                  | TEST   | <div><div>3</div></div>                         | 0%         |                                                                                                                                                                                                                                                      |

# Technology Operations

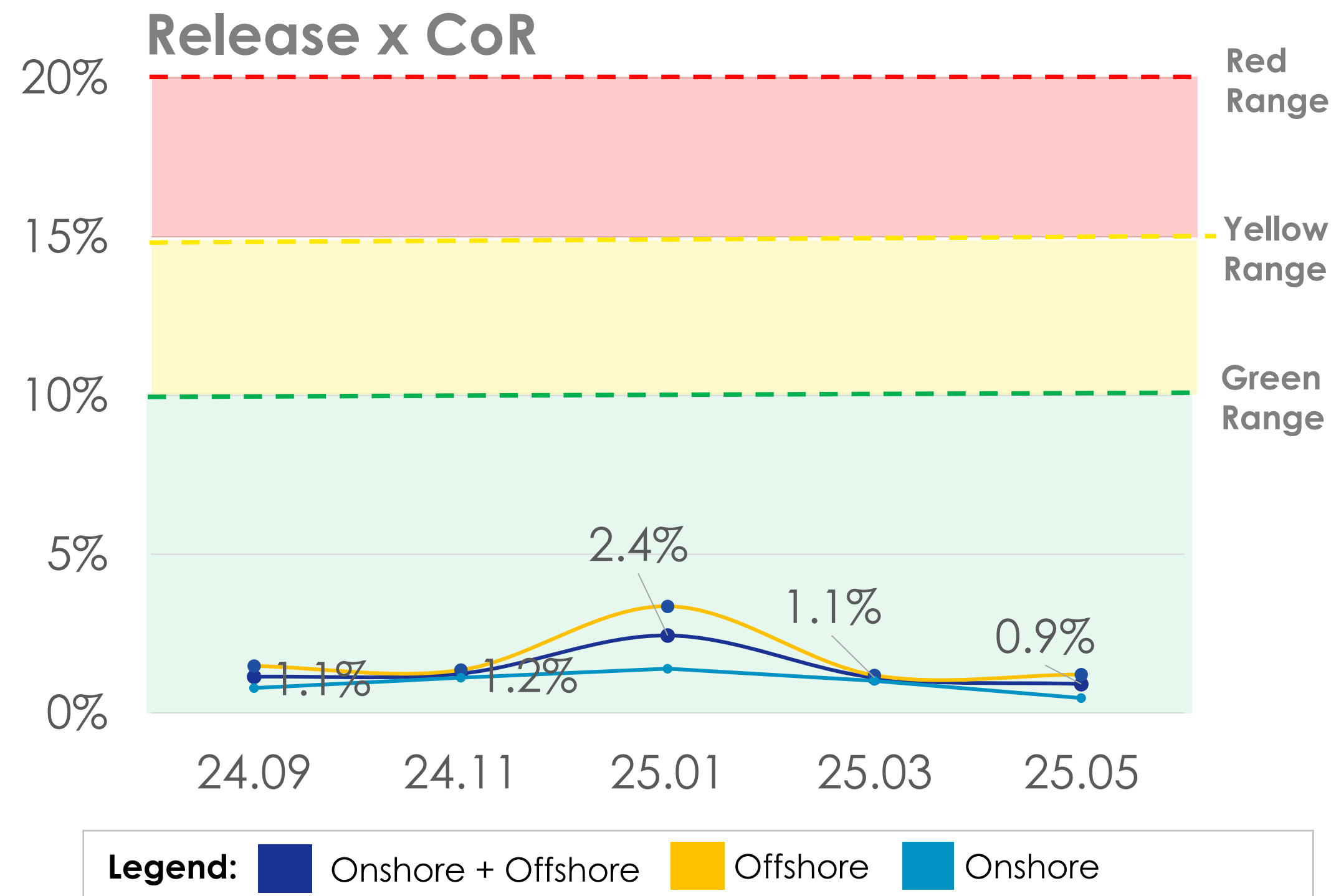
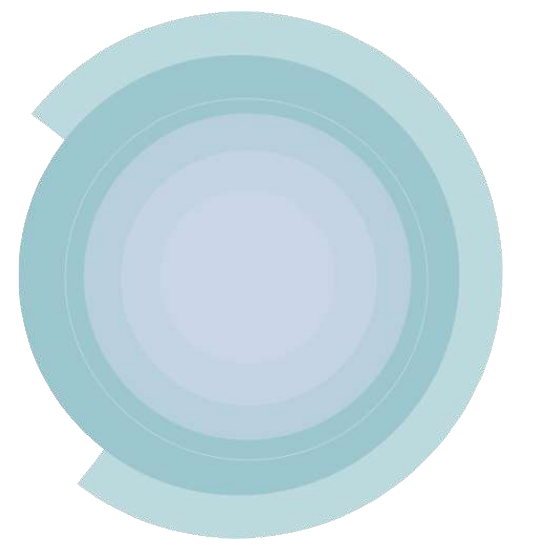


- **Environment Sharing:** Comprehensive plans are in place for sharing select environments through transition. Will continue to monitor for possible risks.
- **T-90 Initiative:** The team has begun practicing production operations in several areas:
  - **Batch Operations** – Reviewed T-90 Plan with Accenture; The team is gaining valuable insights into frequent batch issues, as well as refining their understanding of batch monitoring and the report generation process. Team is observing/researching approximately 25 to 30 batch jobs requires rerun each night. Additionally, there are consistent failure affecting 2 to 3 FTP inbound and outbound batch jobs.
  - **Tier 3 Help Desk** – Reviewed T-90 Plan with Accenture; The team has analyzed approximately 265 tickets across the Fiscal, Online, and Correspondences areas, gaining key insights into defect trends, ticket-to-problem mapping workflows, and the overall ticket life cycle.
  - **Release Management** – Developed mock 6 and 7-week 25.09 Release Communications; created and disseminated the 2026/27 CalSAWS Deployment Calendar.

# Quarterly Performance Trends

# CalSAWS Quarterly Statistics

## CalSAWS Application Release Quality Metrics



### 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

$(\text{Actual Rework effort Hours} / \text{Actuals To Date Hours}) * 100$

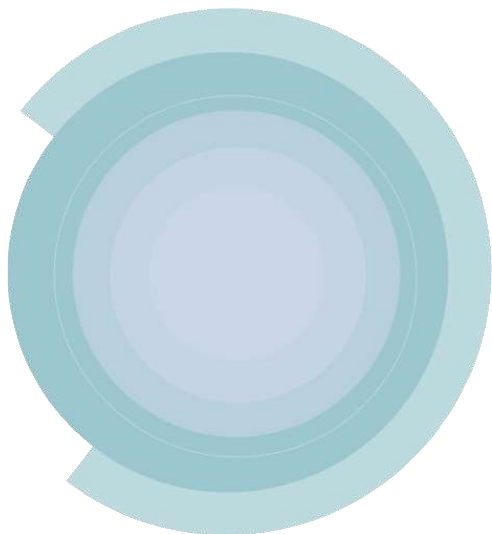
The combined onshore and offshore CoR for CalSAWS code release deployment remains low across releases indicating high quality releases with the additional offshore team

The CoR line graph may increase for the releases if additional defects are found in the future

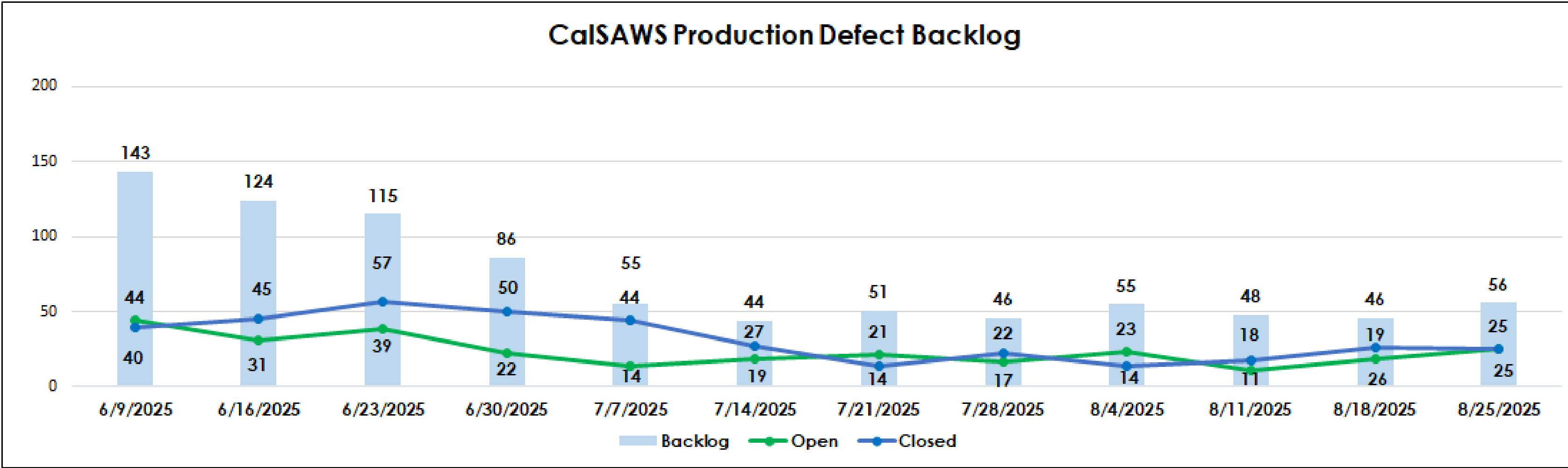
New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 25.07 COR numbers will be available after 25.09 goes live

# CalSAWS Quarterly Metrics

## Production Defects Backlog



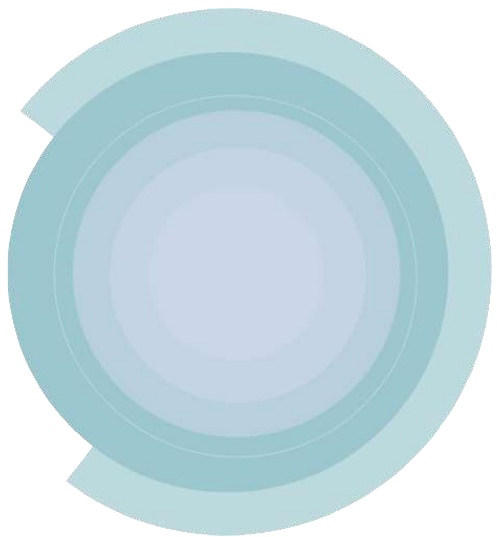
Open production defect rate has remained level, demonstrating system stability with no major spikes outside of normal ranges



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          | ✓          | Daily Peak Usage Hours Availability                                              | ✓   | ✓    | ✓    | ✓   |
| 6          | ✓          | Daily Prime Business Hours Availability                                          | ✓   | ✓    | ✓    | ✓   |
| 7          | ✓          | Daily Peak Usage Hours ED/BC Response Time                                       | ✓   | ✓    | ✓    | ✓   |
| 8          | ✓          | Daily Prime Business Hours ED/BC Response Time                                   | ✓   | ✓    | ✓    | ✓   |
| 9          | ✓          | Daily Peak Usage Hours Screen to Screen Navigation Response Time                 | ✓   | ✓    | ✓    | ✓   |
| 10         | ✓          | Daily Prime Business Hours Screen to Screen Navigation Response Time             | ✓   | ✓    | ✓    | ✓   |
| 11         | ✓          | 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         | ✓          | Security Incident Notification                                                   | ✓   | ✓    | ✓    | ✓   |
| 18         | ✓          | Security Incident Reporting                                                      | ✓   | ✓    | ✓    | ✓   |
| 19         | ✓          | Security Incident Negligence                                                     | ✓   | ✓    | ✓    | ✓   |

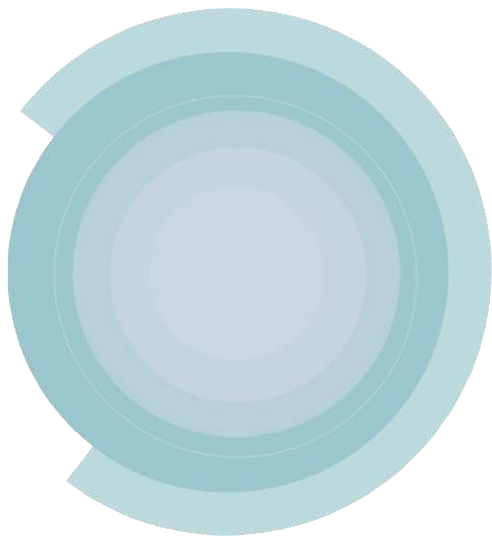
*\*August SLA Metrics are still being formally reviewed*

**Legend:** ✓ SLA Met ✗ SLA Not Met ✓ LD Applies



# CalSAWS Quarterly Metrics

## Infrastructure



| Perf Req # | Performance Requirement Title                                            | May | June | July | Aug |
|------------|--------------------------------------------------------------------------|-----|------|------|-----|
| 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                                             | ✓   | ✓    | ✓    | ✓   |

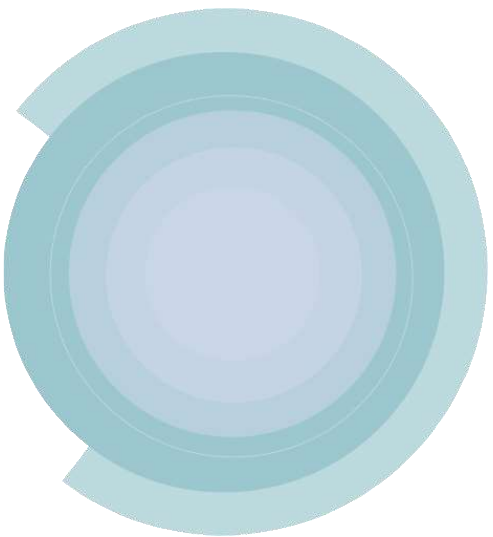
Liquidated damages apply to all Infrastructure SLAs

*\* SLA Metrics are still being formally reviewed*

**Legend:** ✓ SLA Met ✗ SLA Not Met

# Hyland Quarterly Metrics

## Hyland Imaging Performance Metrics

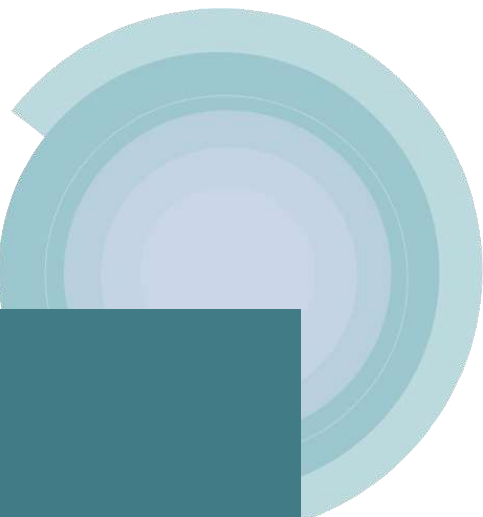


| Performance Requirement Title     | Performance Average Jun-Aug 2025 | Monthly Target | SLA Met |
|-----------------------------------|----------------------------------|----------------|---------|
| Uptime                            | 100%                             | 99.90%         | ✓       |
| 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



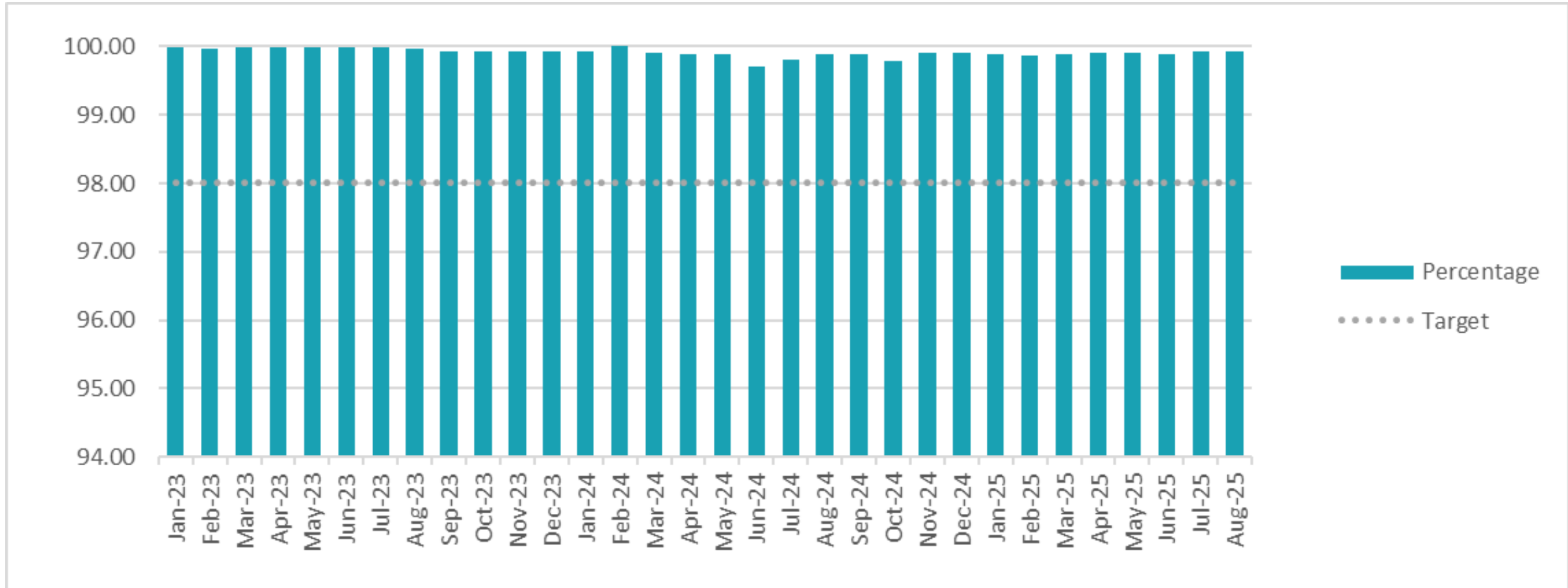
SLAs and Performance

**SLA #1:** Daily Online Transactions – inquiry screens (bounded)

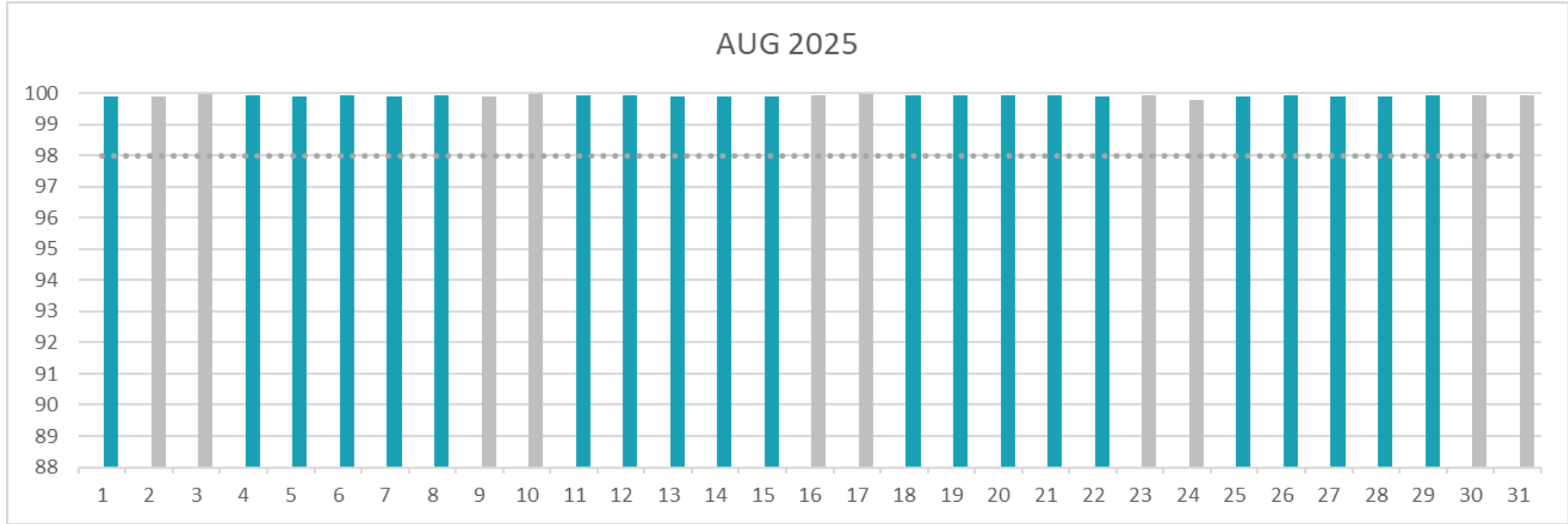
**Target:** 98% with an average response time < 2 seconds

**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

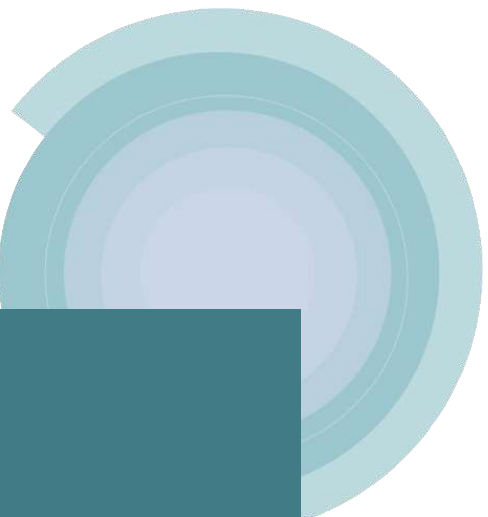


Daily View: Aug 2025



Legend: Target Met Target Not Met Weekend

# BenefitsCal Performance Metrics (continued)

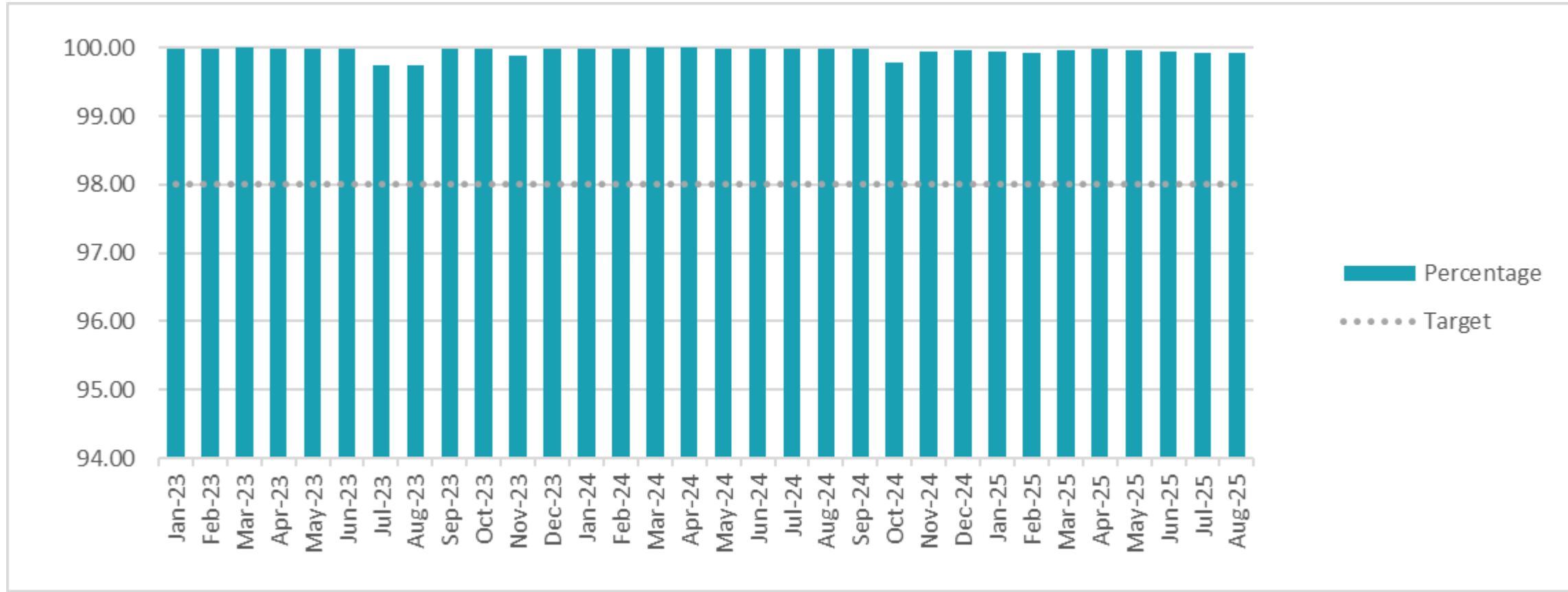


SLA #2: Daily Online Transactions – inquiry screens (unbounded)

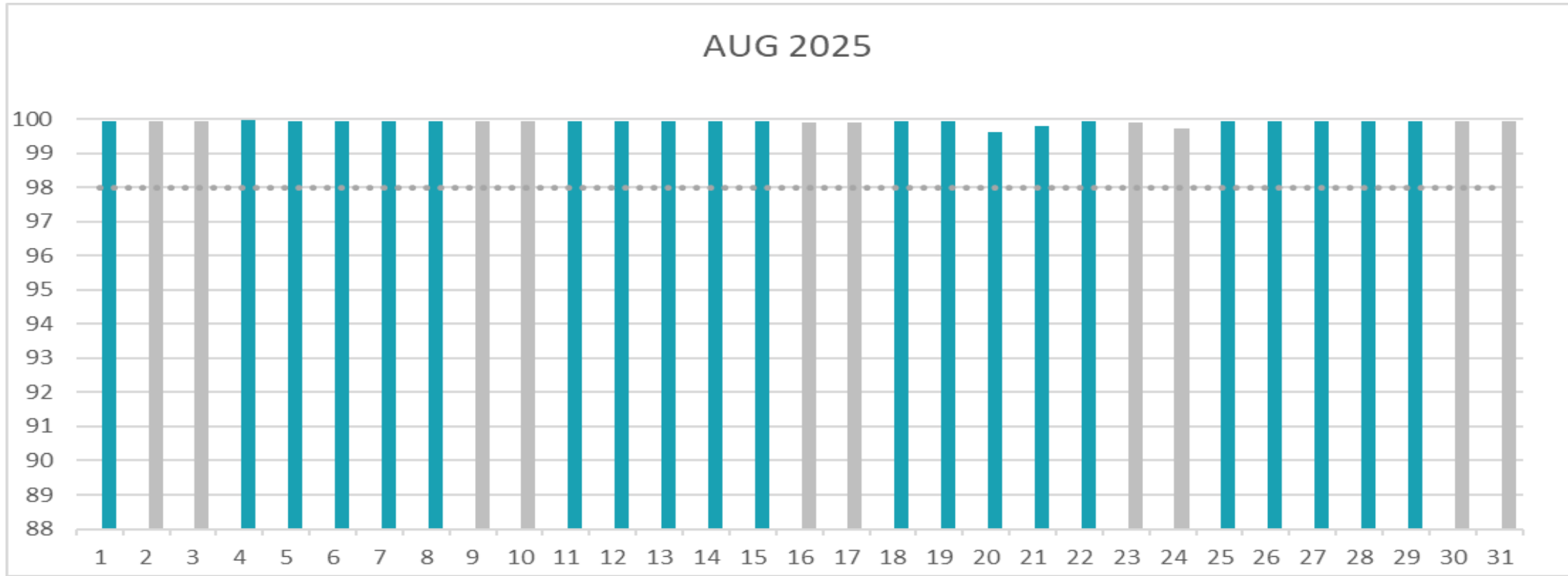
Target: 98% with an average response time <10 seconds

Actual: Exceeded daily online transaction (unbounded) response time at no less than 99.93% since January 2023.  
Measured daily and reported on Monthly

Monthly View: Jan 2023 – Aug 2025

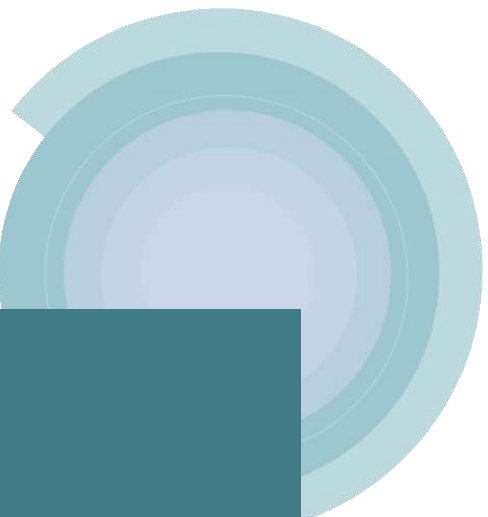


Daily View: Aug 2025



Legend: Target Met Target Not Met Weekend

# BenefitsCal Performance Metrics (continued)

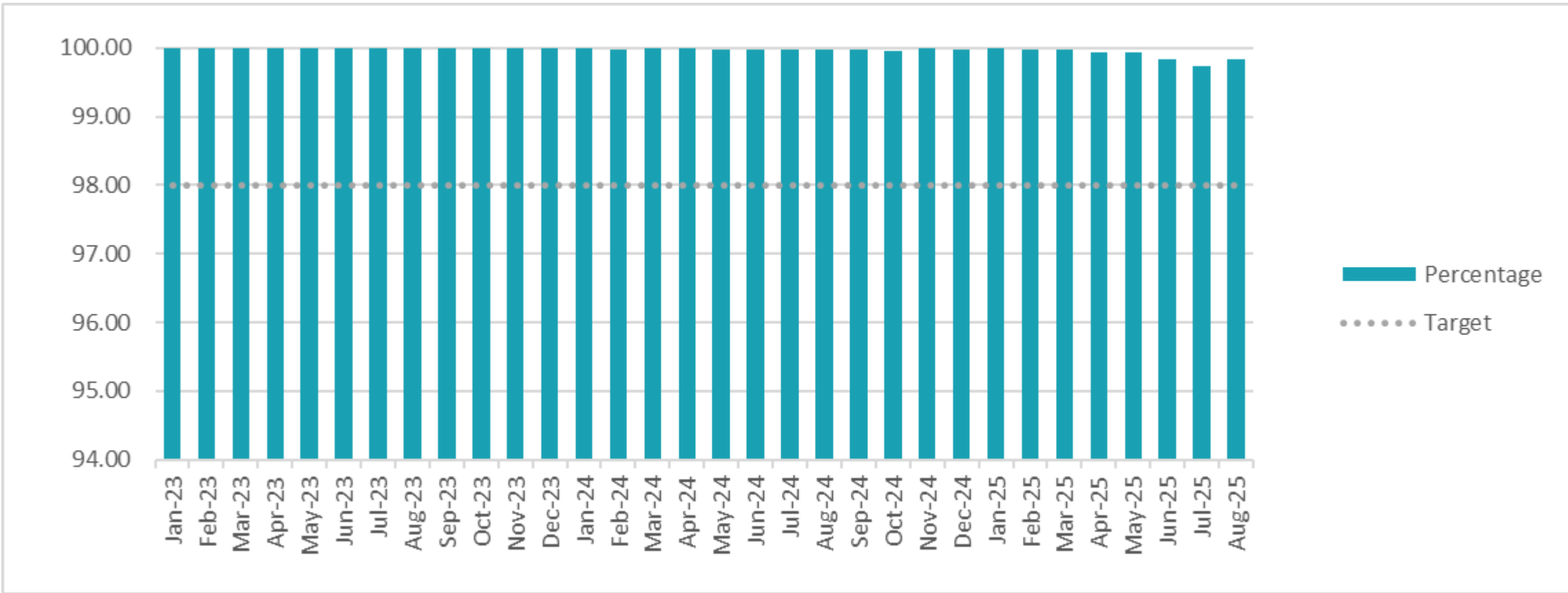


SLA #3: Daily BenefitsCal Hosted API Transactions

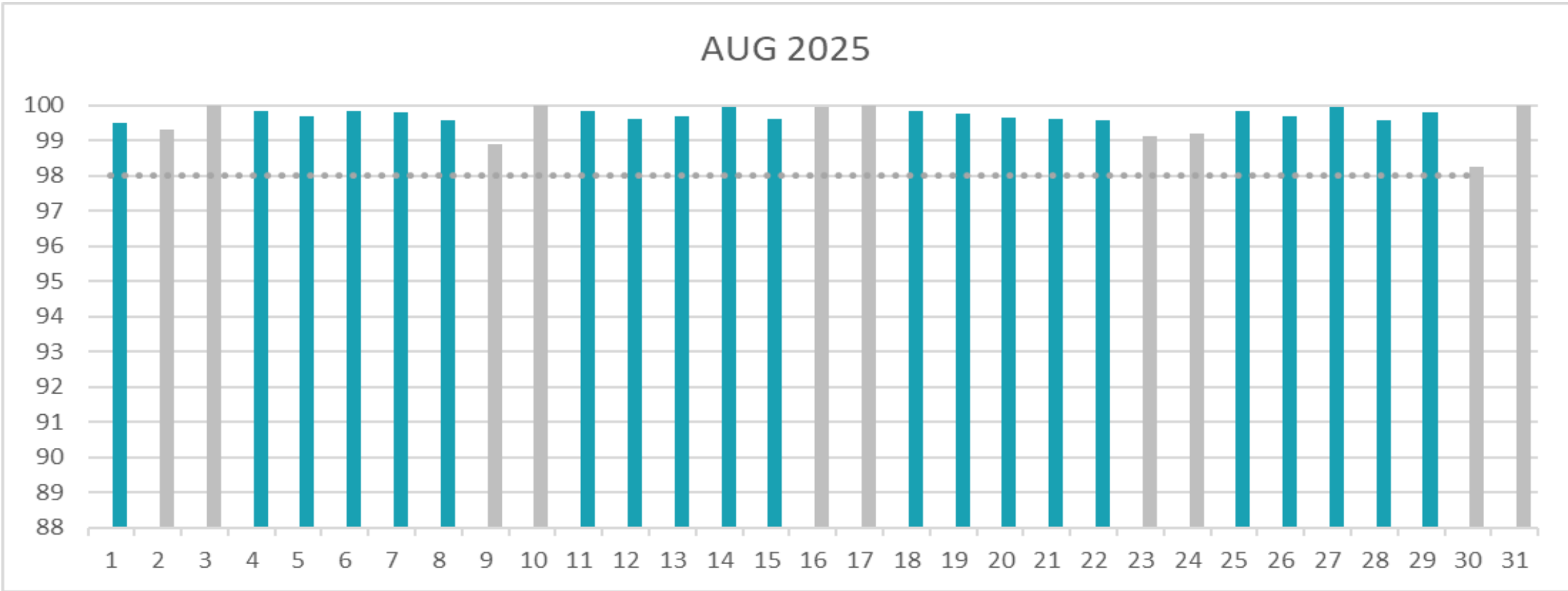
Target: 98% with an average response time <2 seconds

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



Legend: Target Met Target Not Met Weekend

# Adjourn Meeting