JPA Member Representatives and Board of Directors Meeting
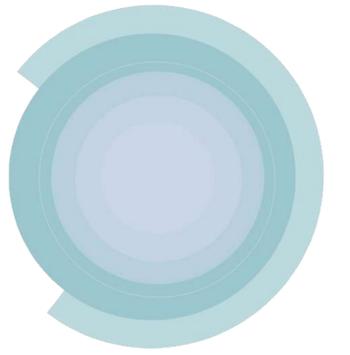
January 29, 2026

CalSAWS

Agenda

1. Call Meeting to Order.
2. Confirmation of Quorum and Agenda Review.

Alameda
Andrea Ford

Contra Costa
Marla Stuart

Marin
Kari Beuerman

Monterey
Roderick Franks

Napa
Jennifer Yasumoto

San Benito
Tracey Belton

San Francisco
Trent Rhorer

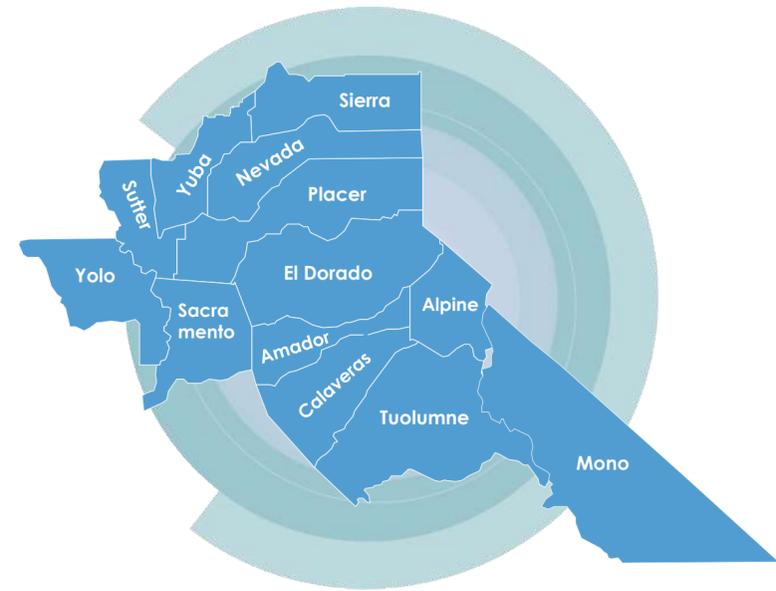**San Mateo**
Claire Cunningham

Santa Clara
Eilona Betkolia

Santa Cruz
Randy Morris

Solano
Alicia Jones

Sonoma
Angela Struckman

Region 1
Attendance

○ **Alpine**
Angela Slais

○ **Amador**
Anne Watts

○ **Calaveras**
Margo Ilonummi

○ **El Dorado**
Timalynn Jaynes

○ **Mono**
Kathy Peterson

○ **Nevada**
Rachel Peña

○ **Placer**
Greg Geisler

○ **Sacramento**
Ethan Dye

○ **Sierra**
Lori McGee

○ **Sutter**
David Nagra

○ **Tuolumne**
Annie Hockett

○ **Yolo**
Tico Zendejas

○ **Yuba**
Jennifer Vasquez

Region 2
Attendance

Butte
Tiffany Rowe

Colusa
Elizabeth Kelly

Del Norte
Ranell Brown

Glenn
Bill Wathen

Humboldt
Connie Beck

Lake
Rachel Dillman-Parsons

Lassen
Jayson Vial

Mendocino
DeDe Parker
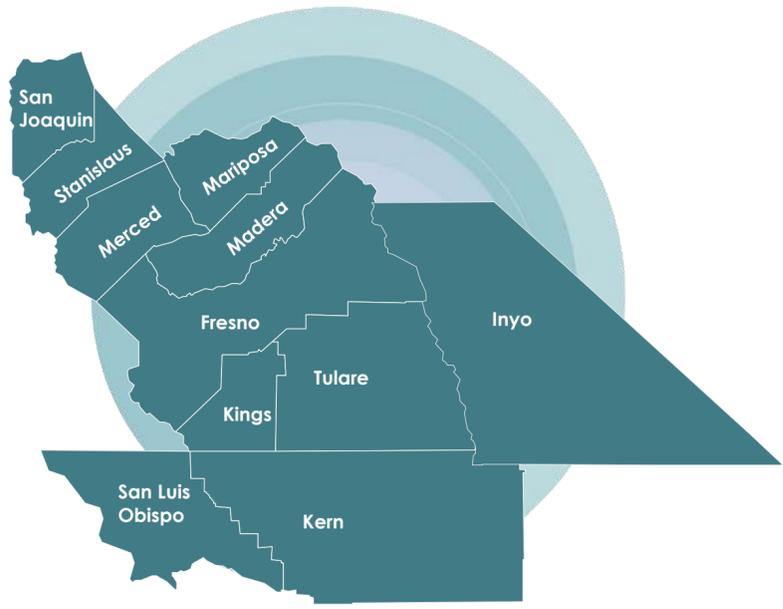
Modoc
Tom Sandage

Plumas
Jennifer Bromby

Shasta
Jonathan Taylor

Siskiyou
Trrish Barbieri

Tehama
Bekkie Emery

Trinity
Liz Hamilton

Region 3
Attendance

Fresno
Sanja Bugay

Inyo
Anna Scott

Kern
Lito Morillo

Kings
Wendy Osikafo

Madera
Deborah Martinez

Mariposa
Dr. Kristina Keheley

Merced
John Ceccoli

San Joaquin
Chris Woods

San Luis Obispo
Devin Drake

Stanislaus
Christine Huber

Tulare
Francena Martinez

Region 4
Attendance
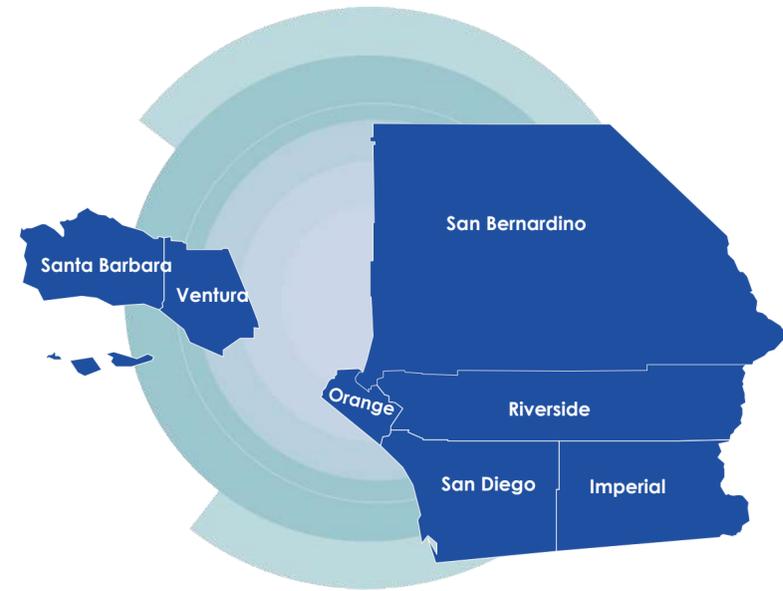
Imperial
Paula Llanas

Orange
Veronica Rodriguez

Riverside
Charity Douglas

San Bernardino
James Locurto

San Diego
Alberto Banuelos

Santa Barbara
Daniel Nielson

Ventura
Roger Robinson

Region 5
Attendance

Los Angeles
Michael Sylvester

Los Angeles
Kristin Stranger

Los Angeles
Rogelio Tapia

Region 6
Attendance

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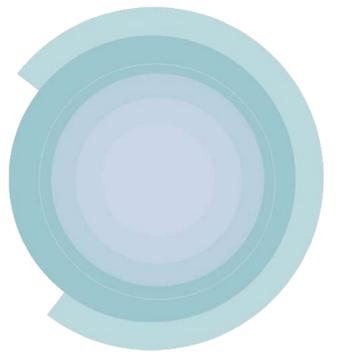
3. Public Comment: Public opportunity to speak on any item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

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

Action Items
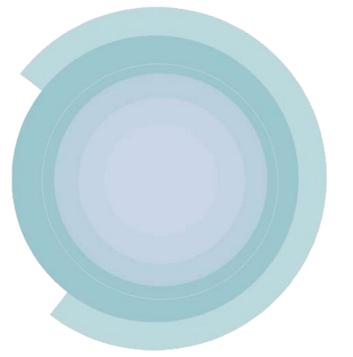
4. Approval of the Administrative Budget for Unfunded Costs for FY 26/27.

Approval of the Administrative Budget

SFY 2026/27 – CalSAWS JPA Administrative Budget

CalSAWS JPA Member Administrative Cost	SFY2026/2027
Insurance Services	$147,583
External Financial Audit	$56,070
SOC 1 Internal Audit Services	$75,700
San Bernardino ATC Accounting Services	$345,450
Conference Fees	$175,000
TOTAL	**$799,803**

The line-item details for the Admin Budget:

1. Insurance Services based on previous year actuals plus 15% contingency

2. Financial Statements and Single Audit Services, include actual contract amount

3. SOC 1 Services actual contract amount, SOC 2 Audit Services are included in CalSAWS Project Budget

4. SB STC projection based on standard hourly rate and estimated hours.

5. Estimated Conference Fees.

Approval of the Administrative Budget
SFY 2026/27 – CalSAWS JPA Administrative Budget

REGION	County	% Share of Persons Count 23/24	CalSAWS Admin Costs 7/1/26 - 6/30/27
1	Alameda	3.12%	$24,954
2	Alpine	0.00%	$0
2	Amador	0.07%	$560
3	Butte	0.61%	$4,879
2	Calaveras	0.10%	$800
3	Colusa	0.07%	$560
1	Contra Costa	2.05%	$16,396
3	Del Norte	0.10%	$800
2	El Dorado	0.28%	$2,239
4	Fresno	3.81%	$30,472
3	Glenn	0.09%	$720
3	Humboldt	0.45%	$3,599
5	Imperial	0.76%	$6,079
4	Inyo	0.04%	$320
4	Kern	3.45%	$27,593
4	Kings	0.49%	$3,919
3	Lake	0.26%	$2,079
3	Lassen	0.07%	$560
6	Los Angeles	29.57%	$236,502
4	Madera	0.59%	$4,719
1	Marin	0.35%	$2,799
4	Mariposa	0.05%	$400
3	Mendocino	0.29%	$2,319
4	Merced	1.08%	$8,638
3	Modoc	0.03%	$240
2	Mono	0.02%	$160
1	Monterey	1.32%	$10,557
1	Napa	0.23%	$1,840
2	Nevada	0.19%	$1,520

REGION	County	% Share of Persons Count 23/24	CalSAWS Admin Costs 7/1/26 - 6/30/27
5	Orange	6.41%	$51,267
2	Placer	0.50%	$3,999
3	Plumas	0.04%	$320
5	Riverside	6.46%	$51,667
2	Sacramento	4.36%	$34,871
1	San Benito	0.14%	$1,120
5	San Bernardino	6.66%	$53,267
5	San Diego	6.84%	$54,707
1	San Francisco	1.67%	$13,357
4	San Joaquin	2.21%	$17,676
4	San Luis Obispo	0.46%	$3,679
1	San Mateo	0.95%	$7,598
5	Santa Barbara	1.09%	$8,718
1	Santa Clara	2.90%	$23,194
1	Santa Cruz	0.55%	$4,399
3	Shasta	0.50%	$3,999
2	Sierra	0.01%	$80
3	Siskiyou	0.14%	$1,120
1	Solano	0.94%	$7,518
1	Sonoma	0.84%	$6,718
4	Stanislaus	1.75%	$13,997
2	Sutter	0.30%	$2,399
3	Tehama	0.21%	$1,680
3	Trinity	0.04%	$320
4	Tulare	2.05%	$16,396
2	Tuolumne	0.11%	$880
5	Ventura	1.62%	$12,957
2	Yolo	0.43%	$3,439
2	Yuba	0.28%	$2,239
	TOTAL	100.00%	$799,803

Amounts per county are subject to change, based on 24/25 Persons Count

Alameda
Andrea Ford

Contra Costa
Marla Stuart

Marin
Kari Beuerman

Monterey
Roderick Franks

Napa
Jennifer Yasumoto

San Benito
Tracey Belton

San Francisco
Trent Rhorer

San Mateo
Claire Cunningham

Santa Clara
Eilona Betkolia

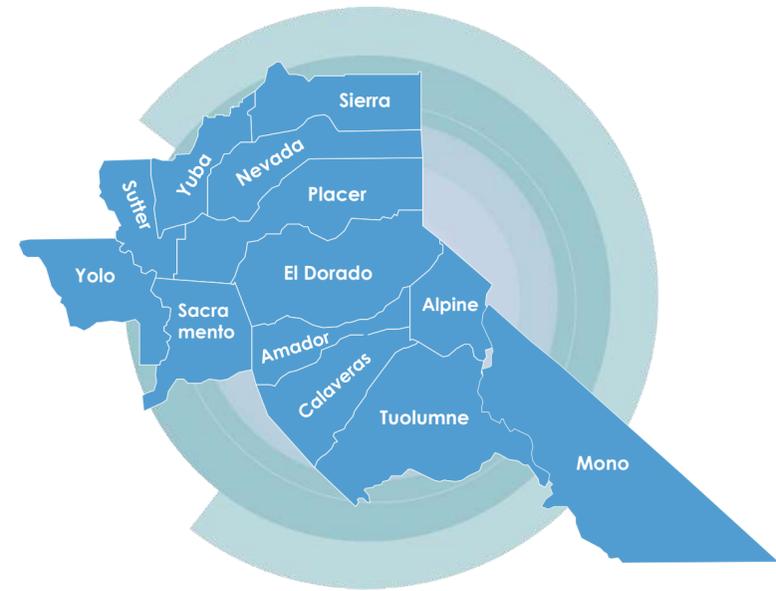Santa Cruz
Randy Morris

Solano
Alicia Jones

Sonoma
Angela Struckman

Region 1
Approval of FY 26/27 Administrative Budget

Alpine
Angela Slais

Amador
Anne Watts

Calaveras
Margo Ilonummi

El Dorado
Timalynn Jaynes

Mono
Kathy Peterson

Nevada
Rachel Peña

Placer
Greg Geisler

Sacramento
Ethan Dye

Sierra
Lori McGee

Sutter
David Nagra

Tuolumne
Annie Hockett

Yolo
Tico Zendejas

Yuba
Jennifer Vasquez

Region 2
Approval of FY 26/27 Administrative Budget

Butte
Tiffany Rowe

Colusa
Elizabeth Kelly

Del Norte
Ranell Brown

Glenn
Bill Wathen

Humboldt
Connie Beck

Lake
Rachel Dillman-Parsons

Lassen
Jayson Vial

Mendocino
DeDe Parker

Modoc
Tom Sandage

Plumas
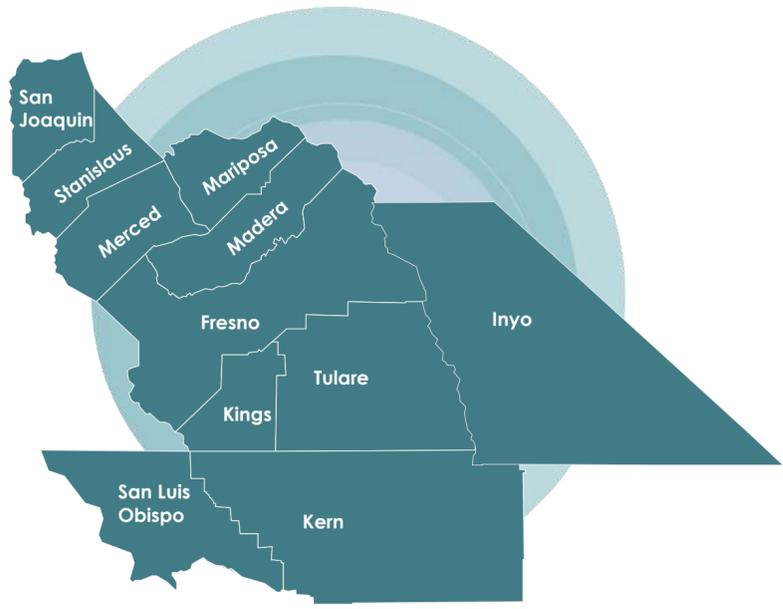Jennifer Bromby

Shasta
Jonathan Taylor

Siskiyou
Trrish Barbieri

Tehama
Bekkie Emery

Trinity
Liz Hamilton

Region 3
Approval of FY 26/27 Administrative Budget

Fresno
Sanja Bugay

Inyo
Anna Scott

Kern
Lito Morillo

Kings
Wendy Osikafo

Madera
Deborah Martinez

Mariposa
Dr. Kristina Keheley

Merced
John Ceccoli

San Joaquin
Chris Woods
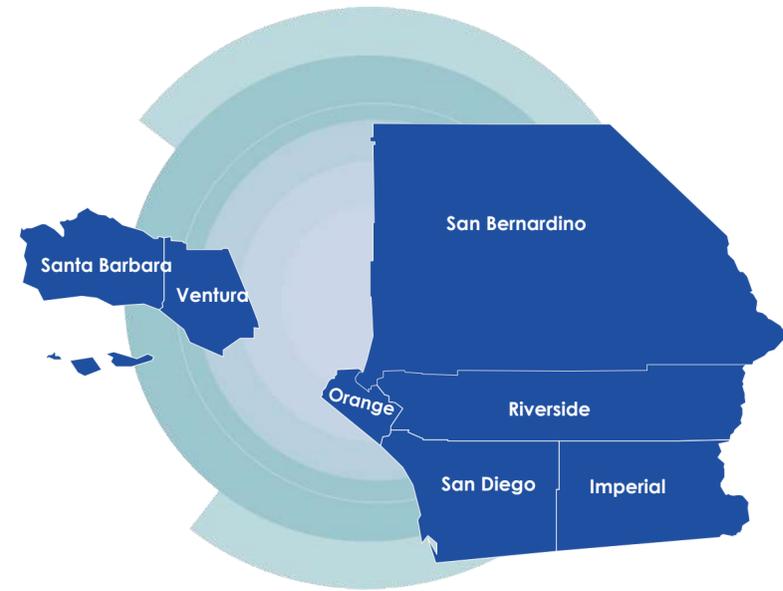
San Luis Obispo
Devin Drake

Stanislaus
Christine Huber

Tulare
Francena Martinez

San Joaquin
Stanislaus
Mariposa
Merced
Madera
Fresno
Inyo
Tulare
Kings
San Luis Obispo
Kern

Region 4
Approval of FY 26/27 Administrative Budget

Imperial
Paula Llanas

Orange
Veronica Rodriguez

Riverside
Charity Douglas

San Bernardino
James Locurto

San Diego
Alberto Banuelos

Santa Barbara
Daniel Nielson

Ventura
Roger Robinson

Region 5
Approval of FY 26/27 Administrative Budget

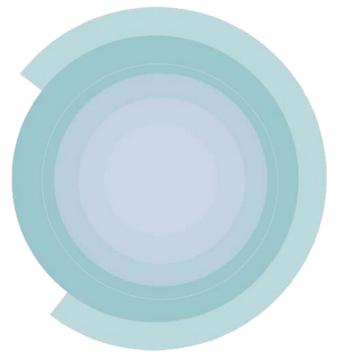Los Angeles
Michael Sylvester

Los Angeles
Kristin Stranger

Los Angeles
Rogelio Tapia

Region 6
Approval of FY 26/27 Administrative Budget

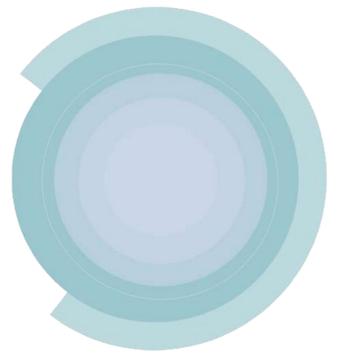# JPA Board of Directors Action Items

Action Items

5. Approval of Accenture, LLP CalSAWS BenefitsCal Agreement which includes goods and services required for the maintenance and operation of the BenefitsCal application in the CalSAWS environment.

Accenture – BenefitsCal Agreement
## Contract Overview

→Transition and One-Time Deliverables

→Project Management

→System Change Requests (SCRs)

→Service Desk (Tier 3)

→Marketing and Public Communications (Customer Outreach)

→Security

→Innovation

→Production Operations

→Software

Contract Term:
Transition Period: February 1, 2026 – July 31, 2026
Base Term: February 1, 2026 – December 31, 2031
Optional Extension Year 1: January 1, 2032 – Dember 31, 2033
Optional Extension Year 2: January 1, 2033 – December 31, 2034
Optional Extension Year 3: January 1, 2034 – Dember 31, 2035
Optional Extension Year 4: January 1, 2035 – December 31, 2036

CalSAWS BenefitsCal Price	Total
BenefitsCal Transition-In Deliverables	$1,562,476
BenefitsCal Base Deliverables	$3,629,566
BenefitsCal Software Price	$1,397,036
BenefitsCal Services	$50,808,070
Total	**$57,397,148**
BenefitsCal Change Allowance	**$20,000,000**
Combined Total Base Term	**$77,397,148**
BenefitsCal Optional Extension Year 1	$10,593,187
BenefitsCal Optional Extension Year 2	$10,606,949
BenefitsCal Optional Extension Year 3	$10,621,399
BenefitsCal Optional Extension Year 4	$10,636,572
BenefitsCal Four 1-Year Optional Extensions Price Subtotal	$42,458,107
BenefitsCal Maximum Price Including Optional Extensions	**$119,855,254**

JPA Board of Directors Vote

Action Item
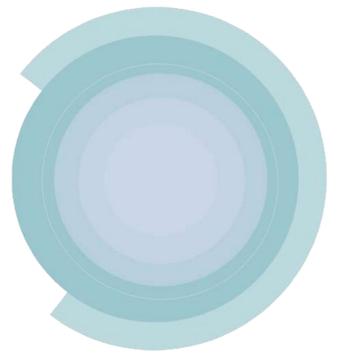
Marla Stuart
○ Yay ○ Nay ○ Abstain

Roderick Franks
○ Yay ○ Nay ○ Abstain

Greg Geisler
○ Yay ○ Nay ○ Abstain

Bill Wathen
○ Yay ○ Nay ○ Abstain

Chris Woods
○ Yay ○ Nay ○ Abstain

Francena Martinez
○ Yay ○ Nay ○ Abstain

Veronica Rodriguez
○ Yay ○ Nay ○ Abstain

James Locurto
○ Yay ○ Nay ○ Abstain

Roger Robinson
○ Yay ○ Nay ○ Abstain

Michael Sylvester
○ Yay ○ Nay ○ Abstain

Kristin Stranger
○ Yay ○ Nay ○ Abstain

Rogelio Tapia
○ Yay ○ Nay ○ Abstain

Accenture, LLP
Accenture Leadership Team
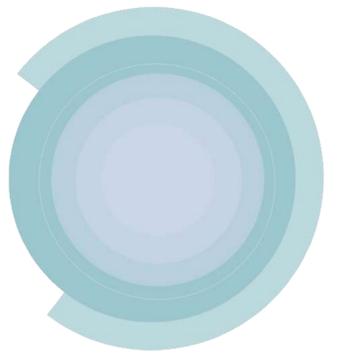
Tamara Fields
Accenture
US Public Service Industry Lead

Lisa Salas
Accenture Managing Director
BenefitsCal Project Manager

Action Items
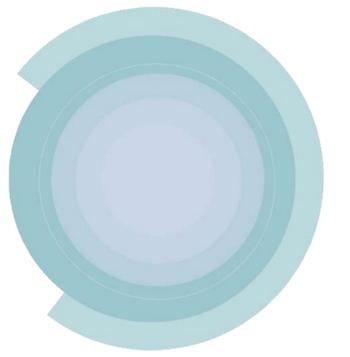
6. Approval of Consent Items

   a. Approval of the Minutes and review of the Action Items for the December 19, 2026, JPA Board of Directors Meeting.

   b. Approval of Deloitte Portal/Mobile Work Order 20, which includes BenefitsCal transition-out services.

   c. Approval of ClearBest Work Order 8, which includes quality assurance services related to BenefitsCal transition activities.

   d. Approval of Gainwell Central Print Amendment 3, which includes an extension of M&O services and facility for three of the five optional extension years.

JPA Board of Directors Vote

Consent Items
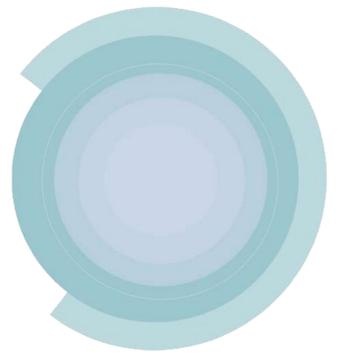
Marla Stuart
◯ Yay ◯ Nay ◯ Abstain

Roderick Franks
◯ Yay ◯ Nay ◯ Abstain

Greg Geisler
◯ Yay ◯ Nay ◯ Abstain

Bill Wathen
◯ Yay ◯ Nay ◯ Abstain

Chris Woods
◯ Yay ◯ Nay ◯ Abstain

Francena Martinez
◯ Yay ◯ Nay ◯ Abstain

Veronica Rodriguez
◯ Yay ◯ Nay ◯ Abstain

James Locurto
◯ Yay ◯ Nay ◯ Abstain

Roger Robinson
◯ Yay ◯ Nay ◯ Abstain

Michael Sylvester
◯ Yay ◯ Nay ◯ Abstain

Kristin Stranger
◯ Yay ◯ Nay ◯ Abstain

Rogelio Tapia
◯ Yay ◯ Nay ◯ Abstain

Informational Items
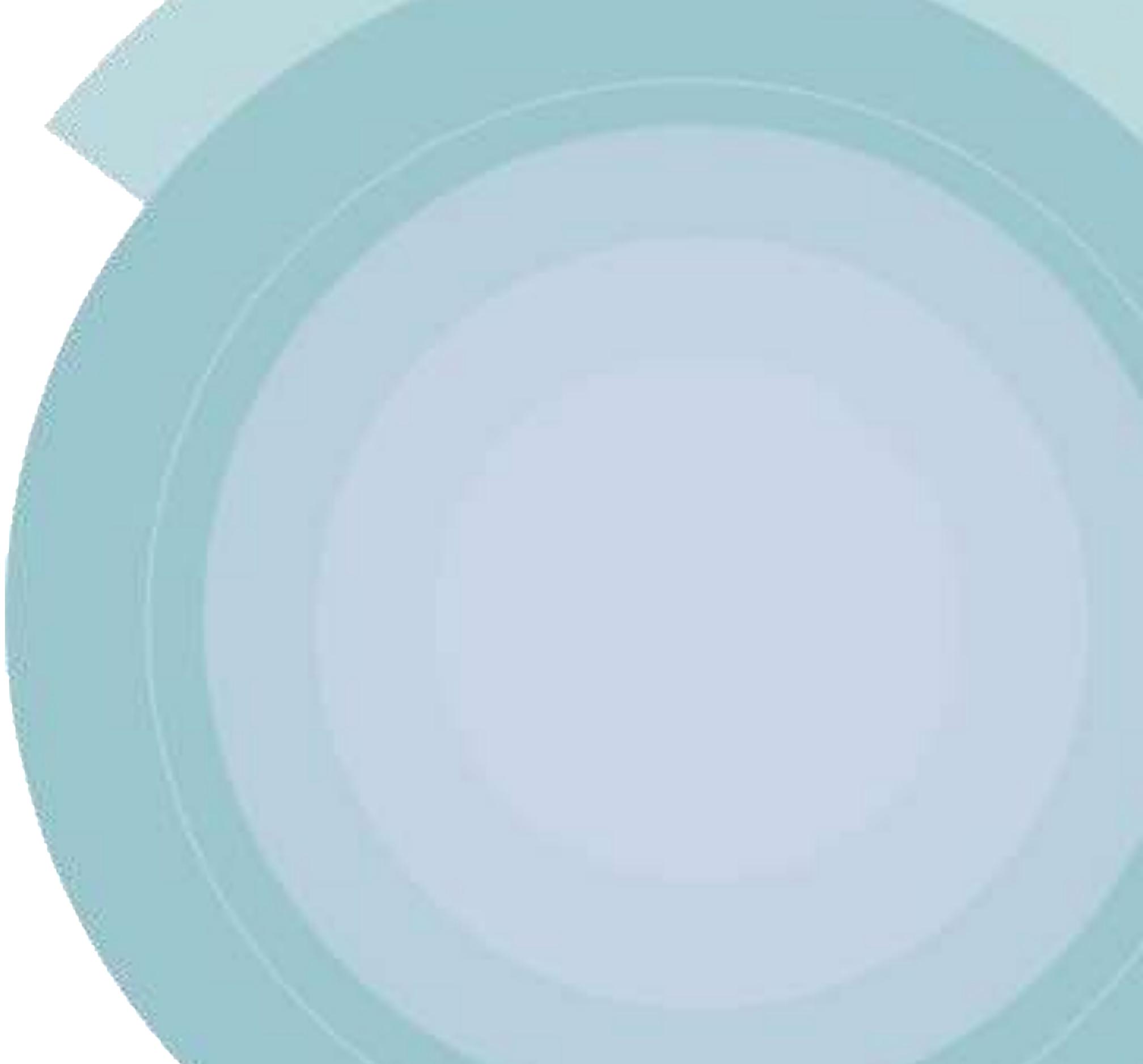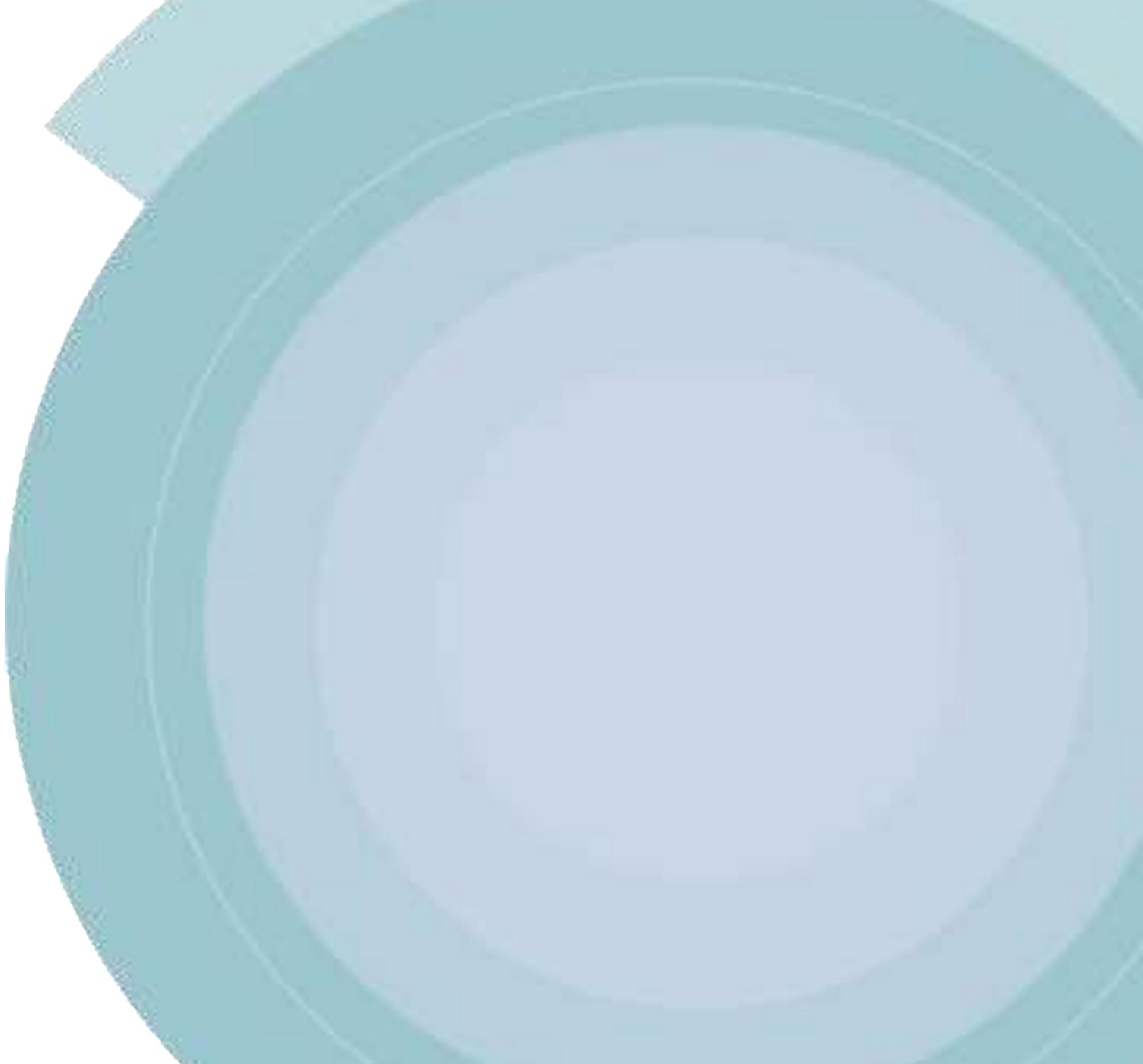
Strategic Priorities Discussion

Strategic Objectives

Objective 1:
Enhance Self-Service Access

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

Objective 2:
Streamline Administrative Processes

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

Objective 3:
Enhance User Experience & Support

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

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

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

Objective 1

Enhance Self Service Access

Collaboration Model:

Eight Initiative Requests were submitted:

- CWDA/Counties
  - Customer Change Reporting Assistant
  - Enhanced Upload Categorization in BenefitsCal
  - Real Time Secure Upload and E-Signature Link for Client Assistance
- Advocates
  - Language Access
  - Document Imaging
  - Account Creation/Login
- DHCS
  - Improve Application and Renewal Flow
- CDSS
  - Driving Customer Action

TIMELINE
Collaboration Model

Advisory Group
- Subgroup meetings with constituents to craft Initiative Requests (IRs)
- 3 per subgroup

Aug/Sept

Advisory Group
- Subgroups submit up to 3 Initiative Requests to CalSAWS

Initiative Request Submission Deadline (October 15th)

Nov

IR Review Continues

Jan

IR Presentations/Prioritization

JPA Update
- Prioritized IRs go to JPA for awareness

Advisory Group Check-In
- Two Options (choose one)
- Monday Sept 22 11am-12pm
- Tuesday Sept 23 10am-11am

Quarterly Stakeholder Meeting
- Wednesday Sept 17 10am

Oct

Initiative Request Packaging and Distribution
- CalSAWS to distribute all Initiative Requests to Advisory Group **(distributed October 31)**
- 60 Day IR Review Period Begins

PSC/JPA Update
- Collaboration Model Update: Initiative Request Summary& Change Matrix Overview

Dec

Quarterly Stakeholder Meeting
- Wednesday December 17 10am

Advisory Group Initiative Request Presentations
- Discussion and Prioritization via the Change Matrix
- **January 26, 9am-4pm**

Feb

Objective 2

Streamlining Administrative Processes

- CalFresh Error Rate Enhancements
- Automation of the Payment Verification System
- Integration of Work Number
- Caseload Management Phase
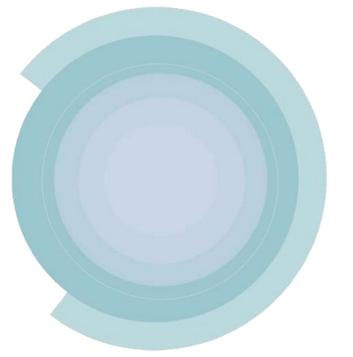
Objective 3

Enhance User Experience & Support
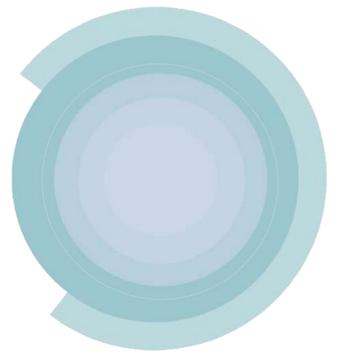
- Collaboration Model - Document Upload - List of Options
- 2025 Updates to the Single Streamlined Application (SSApp)
- Update e-Message Functionality to receive New Statuses from CalSAWS
- Collaboration Model - Revamp Customer Dashboard
- Collaboration Model - CBO Support Assistance

Objective 4
Enhance Analytics, Reporting and Client Communications
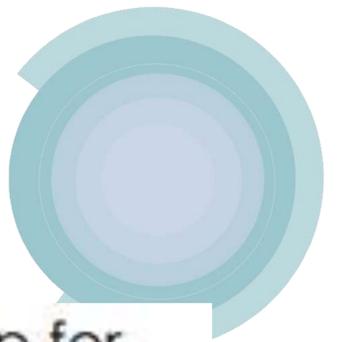
Several **targeted actions were taken last year starting Feb 2025** to ensure implementation is set up for success. Broad **county engagement reveals strong support and excitement** for the new Analytics Platform

Feb '25   Apr '25   Jul '25   Oct '25   Jan '26

County Usage insights understood through CRFI to all counties

Analytics Vision presented at conference

Analytics Requirements Workgroup started to identify analytics requirements

Platform Proof-of-Concept to validate and demonstrate technical solution

Analytics **Visioning workshop completed**

Priority defined at JPA

Direct County Engagement with 58 counties to present Analytics Platform and understand pain points

History of CalSAWS Reporting

Access to data for counties has gone through several iterations of migrations leading to today's collection of reporting tools

3 Different Paths to get answers
Qlik, PBDS, EDR because none fully satisfy the need

Qlik & PBDS
The existing solution is a cloud data repository (PDBS) that feeds the Qlik reports. It lacks the analytics /BI Layer needed to meet evolving business needs/questions

EDR (Copy of Source Oracle Tables
Counties are forced to build their own solutions with a large data team or **leverage external third-party vendors** for help in answering these questions

Apex
introduced as a workaround for ad hoc, since a Qlik report cannot be customized easily. Self-service custom & Ad Hoc Needs continue to be unmet

No True Analytics Layer exists

Does not provide flexibility to changing data needs based on policy changes, such as HR1

Counties lack insight into "why" or "what next"

No foundation for real data-driven decisions

Analytics Platform: Roadmap to Implementation

Six months of groundwork completed to date will enable the delivery of core operational reports to all 58 counties in just 12 months. Subsequent phases will deliver expanded operational and management reports and access to data from other non-core data sources, which counties don't have today

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22

Phase 1 - Core Operational Analytics

- Enable **core operational reports** (Case, Application, Program, & Workload related reports) **covering gaps in current reports** including open SCRs.
- **Advanced self-service tools and dashboards** including rapid custom report creation (minimizing need for SCRs) + ability to ask **natural language questions** to answer **ad-hoc queries**

Phase 2 - Expanded Operational and Management Analytics

- Enable **expanded analytics and reports** (Issuance & Recovery, Provider & Audit) **covering gaps in current reports** including open SCRs.
- **Expanded Self service** capabilities through enablement of **county workspaces** to allow counties to custom develop their own data products

Phase 3 - Unified Customer 360 & Cross-Source Analytics

- Evaluate **Cross-Source Analytics** for additional data sources such as BenefitsCal, Contact Center, Lobby and Imaging
- **Enable Customer 360** (A whole person view of the customer) and **Advanced Analytics** capabilities

Throughout the duration of this project, especially during Phase 1, we would consistently engage the counties for requirements, design reviews, and validations.

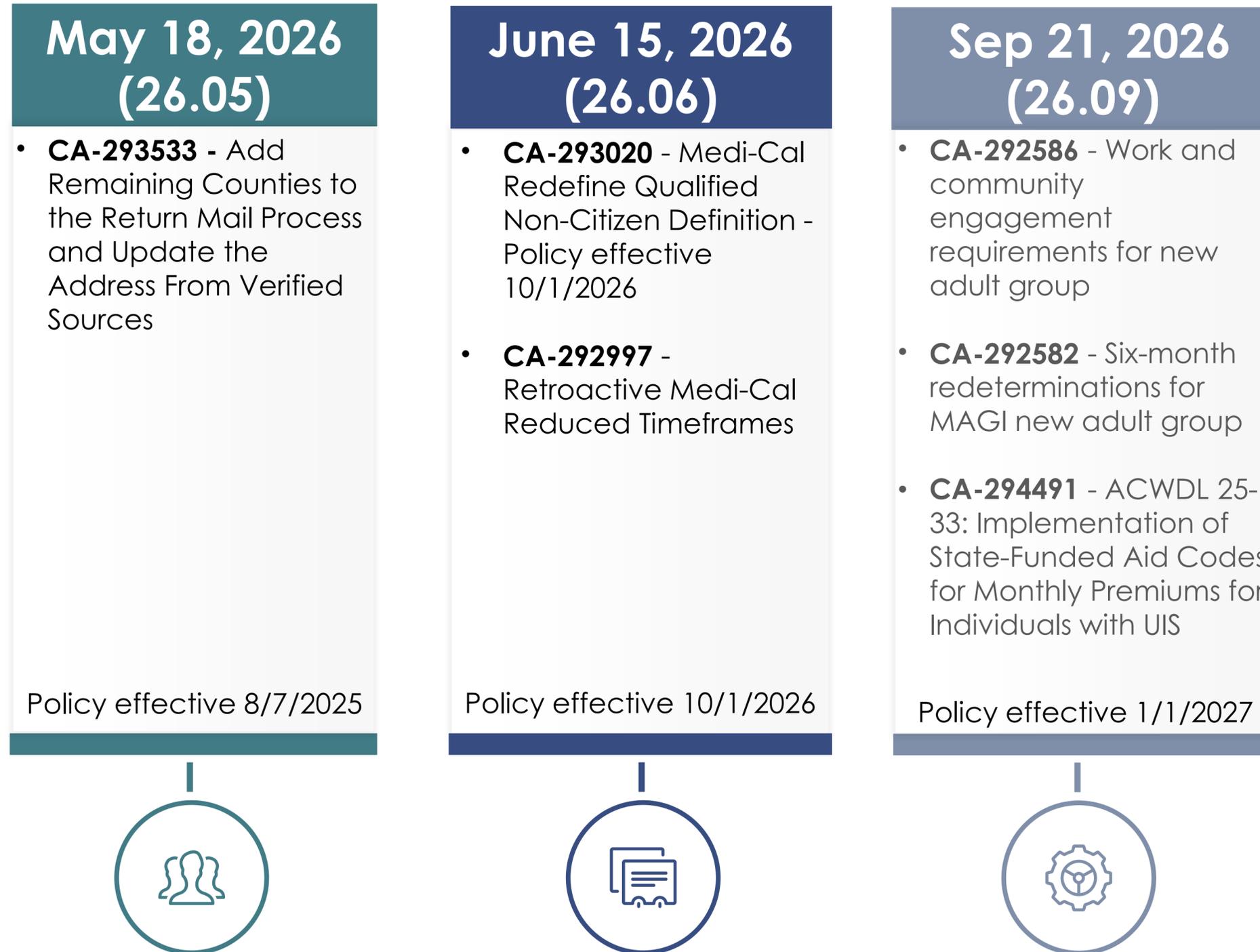# Unlocking Value Through a Shared Analytics Platform

The new analytics platform is designed to dramatically elevate counties' ability to self-serve and innovate. Counties gain the tools and autonomy to use analytics for decision making

Customizable Reports & Dashboards

Natural Language Querying

Curated Data Products

Core Platform Features

Adhoc Queries / Data Access

Unified Data Store

AI Ready Foundation
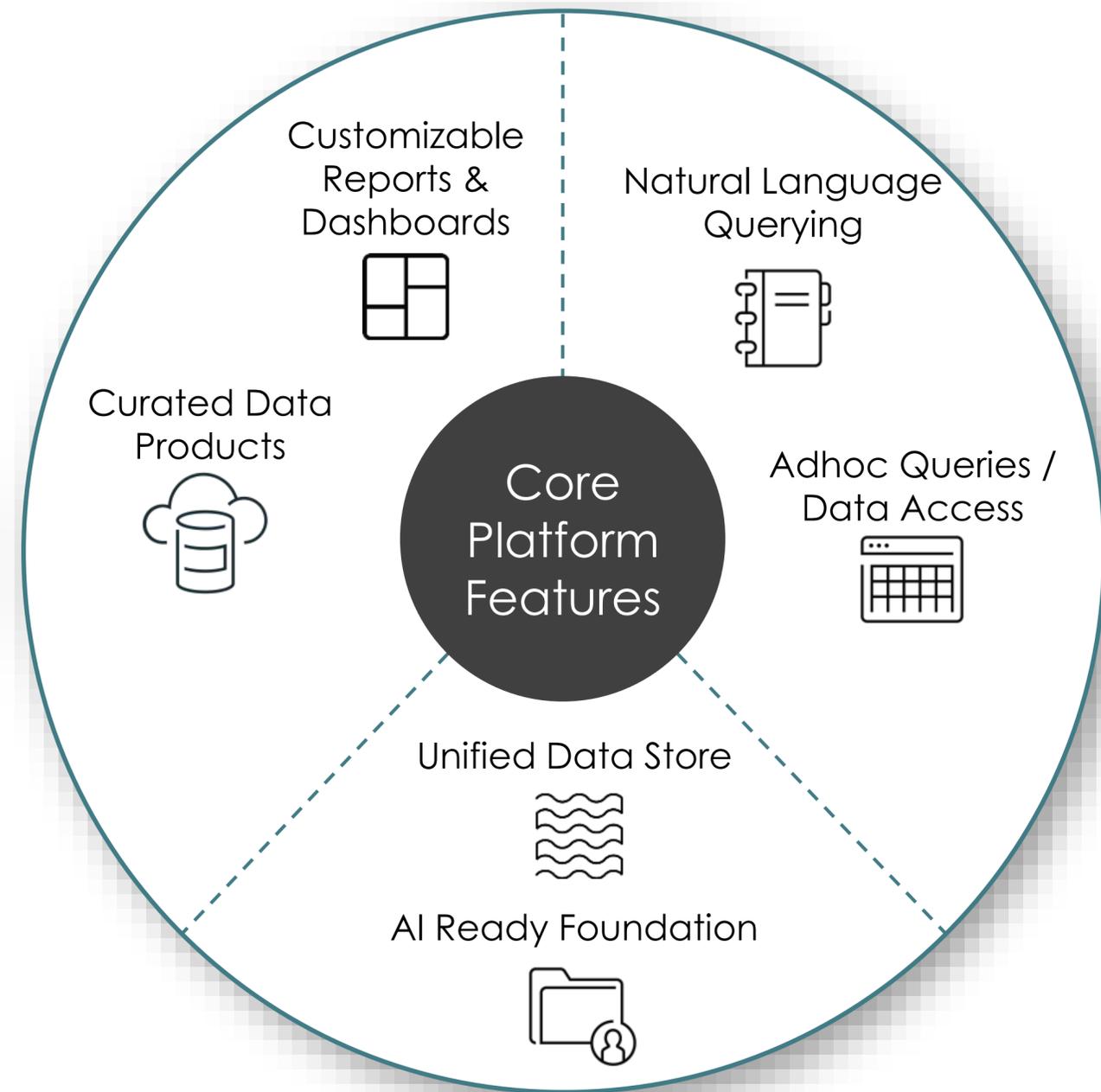
➢ **Quick Response to Policy Changes related report requests** that can be addressed in days, not months, reducing the custom analytics backlog.

➢ **Minimize reliance on third parties or custom solutions** for operational reporting needs

➢ **Equitable access** to data for counties of **all sizes and skill levels,** regardless of how they access the data – reports, dashboards or data products

➢ **Rapid access to combined data,** including non-core sources like BenefitsCal, Call Center, etc.

➢ **Enhanced customer experience:** Enable holistic customer views for county workers to reduce errors and allow for faster, more consistent case actions.

➢ **Advanced analytics:** Enable pattern recognition, predictions, optimization, and scenario analysis capabilities that are not available in the current platform

HR-1 Updates

Medi-Cal HR-1 Policy Roadmap*

May 18, 2026 (26.05)

- **CA-293533 -** Add Remaining Counties to the Return Mail Process and Update the Address From Verified Sources

Policy effective 8/7/2025

June 15, 2026 (26.06)

- **CA-293020** - Medi-Cal Redefine Qualified Non-Citizen Definition - Policy effective 10/1/2026

- **CA-292997** - Retroactive Medi-Cal Reduced Timeframes

Policy effective 10/1/2026

Sep 21, 2026 (26.09)

- **CA-292586** - Work and community engagement requirements for new adult group

- **CA-292582** - Six-month redeterminations for MAGI new adult group

- **CA-294491** - ACWDL 25-33: Implementation of State-Funded Aid Codes for Monthly Premiums for Individuals with UIS

Policy effective 1/1/2027

*Target releases are subject to change.

Medi-Cal HR-1 Policy Roadmap*

Nov 23, 2026 (26.11)

- **CA-286076** – Update the Address Prior to Mailing When an Address Change is Reported by a Third Party

- **CA-294490 -** Automated Discontinuance Process for Ineligible PARIS Interstate and Ineligible Residency Verification Program Matches

Policy effective 12/01/2025 & 1/1/2027

TBD Release

- **CA-291157** - ACWDL 25-XX: Monthly premium for individuals with Unsatisfactory Immigration Status Receiving full scope Medi-Cal Benefits

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

Policy effective 1/1/2027, & 10/1/2029

TBD Release

- **CA-293006** - Deceased Member Verification

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

Policy effective 1/1/2027 & 10/1/2028

Target releases are subject to change.

CalFresh May Revise & HR-1 Policy Roadmap*

Jan 26, 2026 (26.01)

- **CA-294660** - ACL 25-68 Add Energy Assistance Payment Income Type

- **CA-295231** - HR 1 – ACL 25-68 Opt-in All Counties into Automated Batch Process to Evaluate Cases for SUAS Eligibility

Policy effective 7/4/2025

Mar 23, 2026 (26.03)

- **CA-293020** - Add CF 377.11E to the CF RE and CWCF RE Packets

Policy effective 10/1/2026

Mar 31, 2026 (26.03.31)

- **CA-294574/CSPM-80927** – CalFresh Non-Citizen Eligibility Updates

Policy effective 4/1/2026

May 18, 2026 (26.05)

- **CA-294575/CSPM-80744** - Changes to ABAWD Exemptions and Expiration of Statewide Waiver.

- **CA-291366 -** CF 886 Mass Mailer to Inform CalFresh Households about their work registration and ABAWD status

Policy effective 10/1/2025 & 2/1/2026
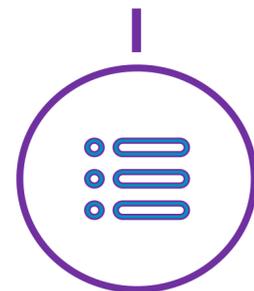
*Target releases are subject to change.

CalFresh May Revise & HR-1 Policy Roadmap*

Jul 20, 2026 (26.07)

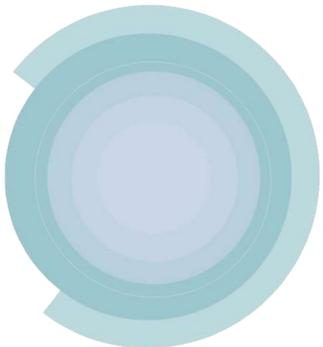- **CA-294653** - ACL 25-68 Add CF 1 Threshold Languages

Policy effective 7/4/2025

Sep 21,2026 (26.09)

- **CA-296429 -** Integration of the Work Number

Policy effective 10/1/2026

*Target releases are subject to change.

CalFresh System Changes In Progress

Intended to help address CalFresh Error Rates

January Release 26.01

SCR	Focus Area	Change
CA-288039	CalSAWS doesn't have a CalFresh (CF) Negative Action that shows a household isn't eligible to be considered a separate household.	Add new negative action reason Add new EDBC status reason Add new NOA fragments
CA-261473	The Homeless Shelter Living Arrangement type isn't used for Restaurant Meals Program (RMP) or the Homeless Shelter deduction. The system also doesn't have "Vehicle" as a shelter category.	Create new expense type Update the EDBC rules One time batch EDBC process
CA-224521	When processing a CalFresh over issuance (OI) for a month with an active cash aid overpayment, the system uses the cash aid amount received as income in the CalFresh budget instead of the amount the recipient was eligible for.	Update CF EDBC OI rules
CA-293058	When running EDBC, users must select the program(s) they want to run on the Run EDBC page.	Default the System to Select All Programs When Running EDBC
CA-281496	When a CalFresh applicant misses their intake interview, the system sends a CF 386 Notice of Missed Interview (NOMI). If the applicant doesn't complete the application and EDBC is run to deny it, the system may generate two CF 377.1A denial notices — one for the missed interview and another for a different reason, such as missing verification.	Update NOA fragment rules

March Release 26.03

SCR	Focus Area	Change
CA-273253	When running multi-month EDBC on an intake case, the system applies 10-day NOA rules to months after the Beginning Date of Aid	Update EDBC rules
CA-244153	When running multi-month EDBC, some NOAs aren't generated or sent. The system prevents duplicate NOAs, but if the same reason applies to multiple months, that NOA is suppressed.	Update NOA suppression logic
CA-221893	When running CW/CF EDBC for a prior application month, the system counts cash aid received after that month as unearned income in the CalFresh EDBC.	Update CF EDBC rules
CA-284174 & CA-293332	Workers manually process income changes reported in a PVS report.	Automate the processing of PVS Abstract data
CA-289178	At times, CalFresh households enrolled in ESAP lose their ESAP status when their certification period is set for less than 24 months.	Update the EDBC rules
CA-296430	Negative Action 39 Label Description - CalSAWS assigns Action Code 39, with a description of "Excess Gross Income," to both gross and net income discontinuance and denial cases. As a result, during QC sampling, cases discontinued for excess net income are being incorrectly negatively flagged because the Action Code description does not reference net income.	Re-label Action Code 39 to 'Over Gross or Net Income'
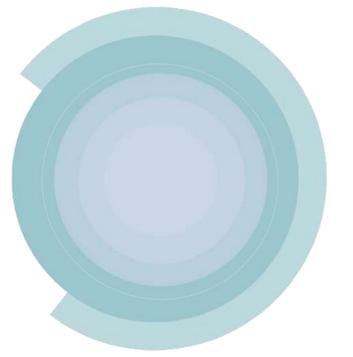
CalFresh System Changes In Progress

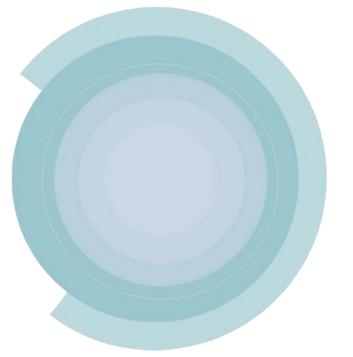## Intended to help address CalFresh Error Rates

May Release 26.05

SCR	Focus Area	Change
CA-204171	When a child in the CalWORKs and CalFresh AU fails or refuses to provide proof of name or identity, the program fails in error. When adding a newborn, "No SSN" errors prevent the infant from being activated.	The SCR design is still in progress

July Release 26.07

SCR	Focus Area	Change
CA-226008	If a household reports a new or changed medical expense that increases benefits, the system applies the increase to the current and remaining months in the payment period.	The SCR design is still in progress

September Release 26.09

SCR	Focus Area	Change
CA-296429	To streamline and improve eligibility determinations, CDSS is looking to automate the integration of the Work Number in CalSAWS to secure verification of income and hours worked.	The design for this SCR has not started

CalFresh System Changes In Progress

## Intended to help address CalFresh Error Rates

November Release 26.11

SCR	Focus Area	Change
CA-55143	Several Fiscal, Batch, and Eligibility issues are causing more cases to have skipped benefits: REs are aligning to the wrong months. When TCF converts back to CF, the new RE period overlaps with the SAR or RE due month from the original period.	The design for this SCR has not started

TBD Release

SCR	Focus Area	Change
CA-277040	Modify EDBC logic for CW/CF to apply all data collection changes using the Change Reason mode (most beneficial) only when EDBC is run for the first time before a period is established. This change will align with Mid-Period Action policy outlined in ACL 21-101.	The design for this SCR has not started

HR-1 CF Processing Work Group
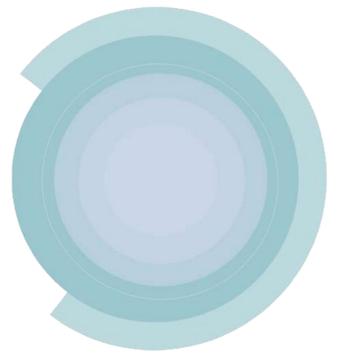
🎯 **Objective:** Gather and prioritize CalSAWS system needs which can help reduce the CalFresh Error Rates in counties.

🤝 **Representation:** 16 counties; 6 regions; CDSS and CalSAWS leadership

📅 **Timeline:** 10/22/2025 to 12/16/2025

📋 **Requirements:** 15 requirements prioritized across the following themes:

	Groupings	Requirement Type	# Requirements
Requirement Themes	Automated System Error Reviews	System validation of entries in real time to alert workers of potential errors for review.	6
	Nudges and Navigation	On-screen nudges throughout the system, prior to saving changes. These prompts will encourage workers to verify information updated in specific scenarios.	4
	Interview Support	Automatic, real-time prompts during interviews to help workers capture, clarify, and verify information. Along with recording this information in journals.	3
	Technical Changes	Enhanced Supervisor Authorization configuration that is customizable by program and scenario.	2

Note: Design review and approval to leverage existing committee processes unless the scope or complexity warrants formation of a dedicated workgroup.

HR-1 CF Processing Workgroup: SCR Implementation Timeline
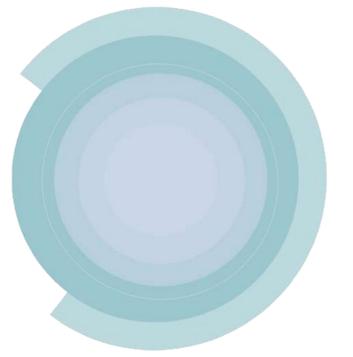
➢ **CA-296569:** CalFresh Processing HR1 Work Group – Automated System Error Reviews (Phase 1)

➢ **CA-296576:** Automate contribution amounts to minimize manual entry, while still requiring worker review and adjustment when necessary

➢ **CA-296573:** CalFresh Processing HR1 Work Group - Targeted nudges and navigation improvements to help workers verify and confirm information accuracy

➢ **CA-296572:** CalFresh Processing HR1 Work Group - Automatic prompts during interviews to support information capture, clarification, verification, and journal documentation

| Summer 2026 | Fall 2026 | Winter 2026 |

➢ **CA-296575:** CalFresh Processing HR1 Work Group - Configurable supervisor authorization enhancements by program and scenario

➢ **CA-297005:** CalFresh Processing HR1 Work Group – Automated System Error Reviews (Phase 2)

Note: *CalSAWS releases are consistently planned to full capacity. When new priority items are identified, previously scheduled SCRs may be deferred to subsequent releases to ensure continued alignment with the priorities.*

HR-1 Ad-Hoc Reporting Work Group
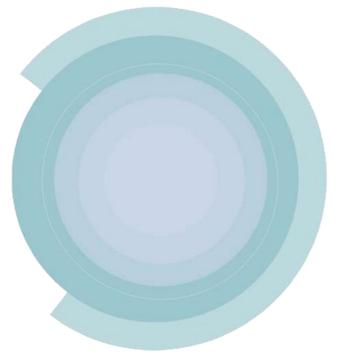
🎯 **Objective:** Gather and prioritize CalSAWS HR-1 Ad-Hoc reporting requirements to assist the counties to visualize the populations impacted by HR-1 policies.

🤝 **Representation:** 16 counties; 6 regions; CDSS and CalSAWS leadership

📅 **Timeline:** 10/23/2025 to 1/28/2026

📋 **Requirements:** 44 requirements identified across the following areas:

HR-1 Ad-Hoc Report Requirements

Report	# Requirements
CalFresh ABAWD	7
Medi-Cal Citizenship (Immigrant Status Enrollment Freeze / Dental Coverage / Monthly Premiums)	11
Medi-Cal Asset Limits	3
CalFresh Demographics (CalFresh Immigrant Disqualification)	4
Medi-Cal Adults Work Rules / Cost Sharing	10
Medi-Cal 6-Month Eligibility (Recertifications)	3
CalFresh SUAs	2
General Requirements for all reports	4

Note: These reports reflect information as of the date generated and are based on current policy interpretations, which may change as policies are clarified. Data is sourced from the CalSAWS system; results from other agencies or data sources may vary.

Timeline of Release

📍 **12/12/25**
DELIVERED: CalFresh ABAWD

📍 **12/23/25**
DELIVERED: CalFresh ABAWD, Medi-Cal Citizenship, Medi-Cal Asset Limits, CalFresh Demographics, Medi-Cal Work Rules, Medi-Cal 6-Month Eligibility

📍 **12/23/25 - 1/16/26**
DELIVERED: Receive Feedback Complete reports handbook, and implement remaining queries including CalFresh SUAs

📍 **1/16/26 – 1/23/26**
Address Feedback Validate updates, Finalize Phase 2 HR-1 Ad-Hoc reports

📍 **1/28/26**
Deliver CalFresh ABAWD, Medi-Cal Citizenship, Medi-Cal Asset Limits, CalFresh Demographics, Medi-Cal Work Rules, Medi-Cal 6-Month Eligibility, CalFresh SUAs
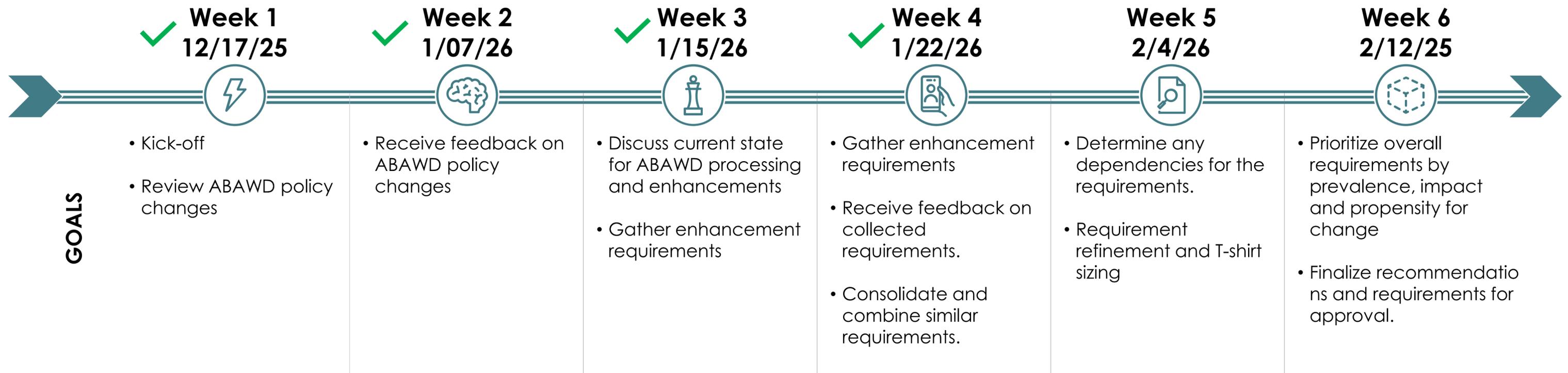
HR-1 ABAWD Enhancement Work Group
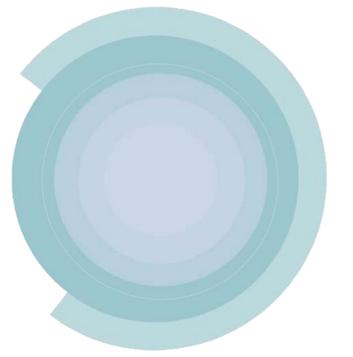
Objective: Gather and prioritize CalSAWS system enhancements and requirements related to ABAWD that will assist counties with implementing the HR1ABAWD policy changes.

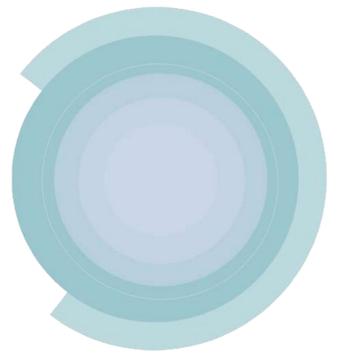**Representation:** 17 counties; 6 regions; CDSS and CalSAWS leadership

Timeline and Goals:

GOALS

| Week 1 12/17/25	Week 2 1/07/26	Week 3 1/15/26	Week 4 1/22/26	Week 5 2/4/26	Week 6 2/12/25
• Kick-off • Review ABAWD policy changes	• Receive feedback on ABAWD policy changes	• Discuss current state for ABAWD processing and enhancements • Gather enhancement requirements	• Gather enhancement requirements • Receive feedback on collected requirements. • Consolidate and combine similar requirements.	• Determine any dependencies for the requirements. • Requirement refinement and T-shirt sizing	• Prioritize overall requirements by prevalence, impact and propensity for change • Finalize recommendations and requirements for approval.

Collaboration Model Update

Meeting Overview

- Purpose of the Forum
  - Structured prioritization and scoring session for Initiative Requests (IRs)
  - Goal: a shared, documented prioritization outcome and clear next steps

- Meeting Attendance
  - Advisory Group members and Subject Matter Experts (SMEs) – in person or virtual
  - "Listen Only" participants – virtual

- Participation and Scoring
  - CalSAWS – facilitation
  - SMEs - present Initiative Requests (if applicable)
  - Advisory Group members - present Initiative Requests (if applicable) and score
    - ❖ Preliminary scoring done ahead of time in the workbooks that were sent to Advisory Group members in late October 2025
    - ❖ Preliminary scores collected ahead of each IR's presentation, then adjusted (if necessary) during discussion and collected again at the end of the IR presentation
  - "Listen Only" participants funnel questions/comments through their respective Advisory Group members
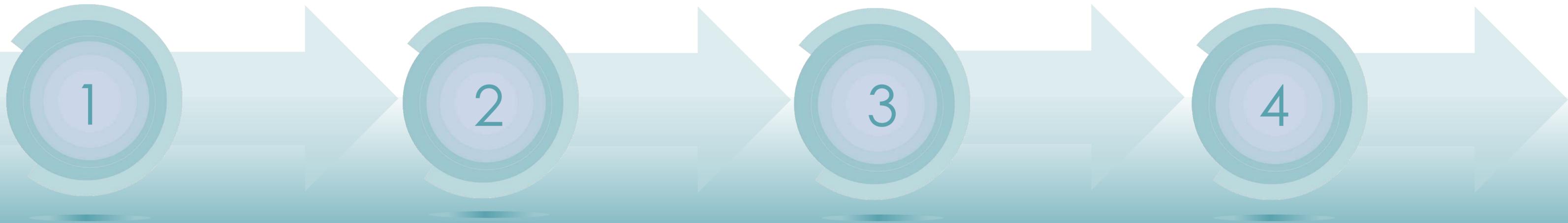
Final Prioritization Summary

1. Customer Change Reporting Assistant

2. Real Time Secure Upload and E-Signature Link

3. Enhanced Upload Categorization in BenefitsCal

4. Document Imaging

5. Improve Application and Renewal Flow

6. Language Access
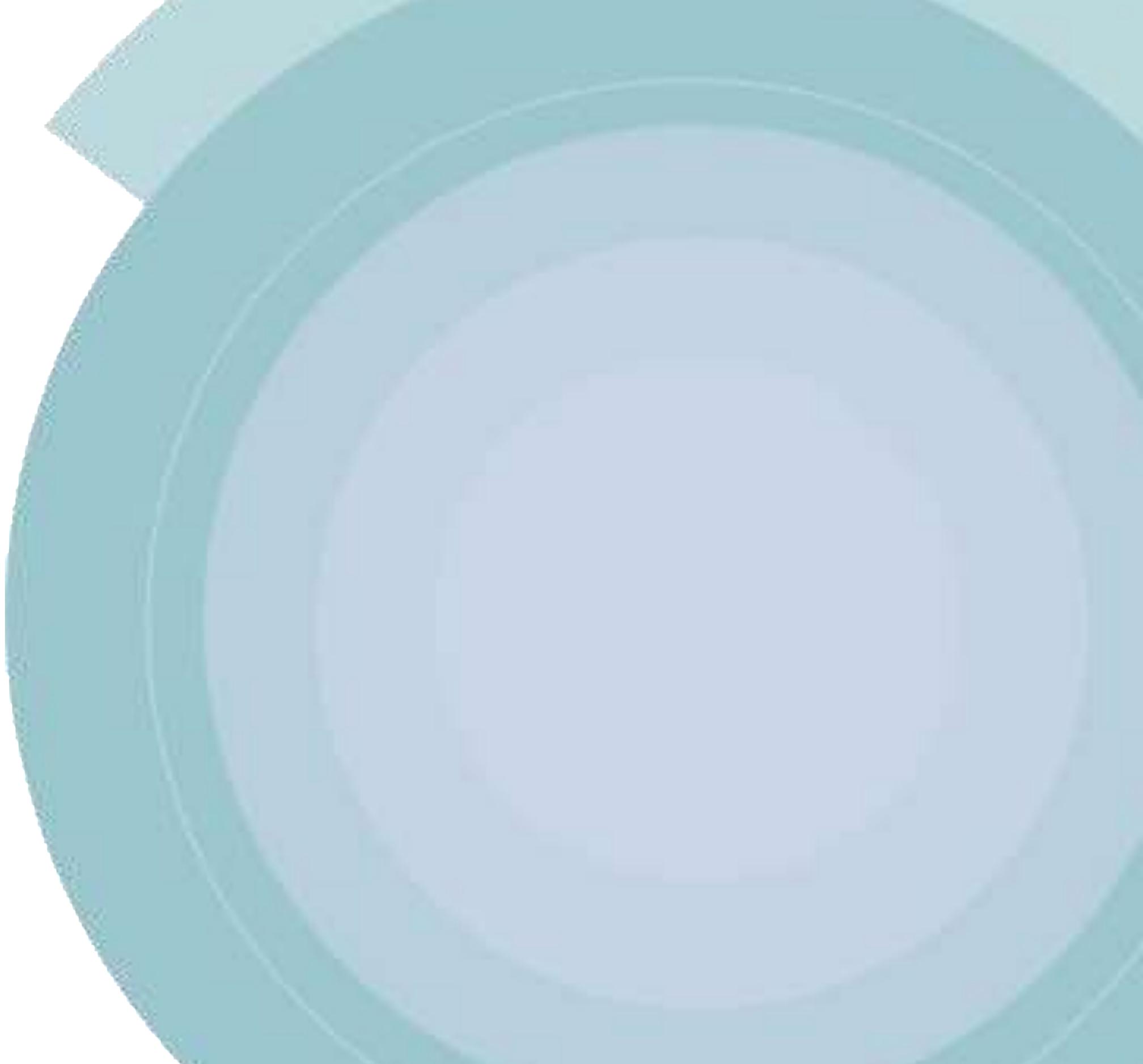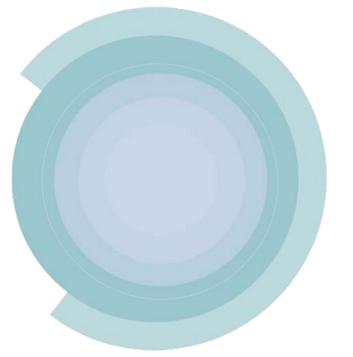
7. Account Creation/Login

8. Driving Customer Action
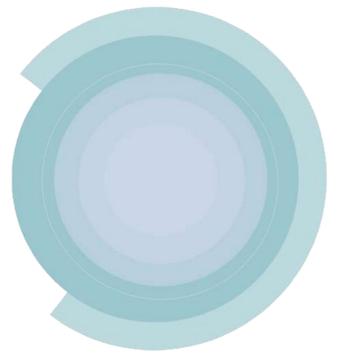
Next Steps

- BenefitsCal team will meet to work IRs into the release schedule
- Resulting system changes will be brought into Software Development Life Cycle (SDLC), including UCD process
- Updates at Quarterly Stakeholder meetings
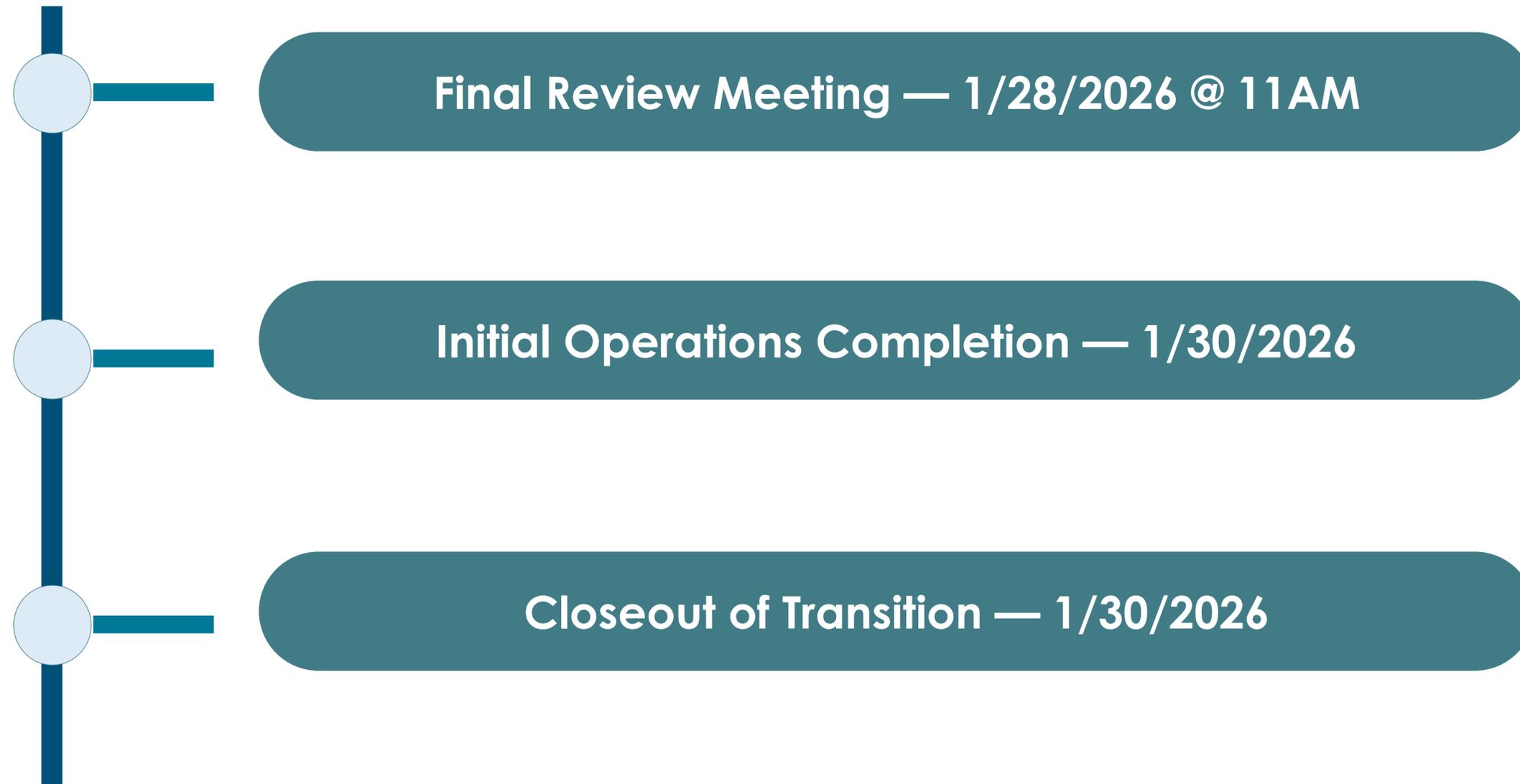- Mid-year checkpoint - June 2026

1　　2　　3　　4

Transition Update

Closeout Activities

Final Review Meeting — 1/28/2026 @ 11AM

Initial Operations Completion — 1/30/2026

Closeout of Transition — 1/30/2026

M&E Release Dashboard

RELEASE #	SCRS	TEST CASES WRITTEN	DESIGN	DESIGN APPROVAL	BUILD	TEST	NOTES
Baseline Releases							
26.01 1/25/2026	53	1104	100%	100%	100%	100%	- Successfully deployed on 1/25.
26.03 3/23/2026	95	0	93%	93%	63%	0%	- Build in progress by 1/30.
26.05 5/18/2026	92	0	64%	8%	0%	0%	- SCR design in progress.
CalSAWS-CalHEERS Releases							
26.02 2/19/2026	3	41	100%	100%	100%	85%	- On schedule as planned by 2/6.
26.06 6/14/2026	8	0	100%	71%	20%	0%	- SCR design approvals in progress.
Priority Releases							
25.12.21 2/14/2026	21	73	COMPLETE				- Successfully deployed on 12/21/2025.
26.02.14 2/14/2026	1	0	10%	0%	0%	0%	- FPL Medi-Cal COLA- Awaiting Values.
26.03.01 03/01/2026	1	0	0%	0%	0%	0%	- 2026 COLA FPL EDBC Run.

Phase Complete **In Progress** **Release Complete**
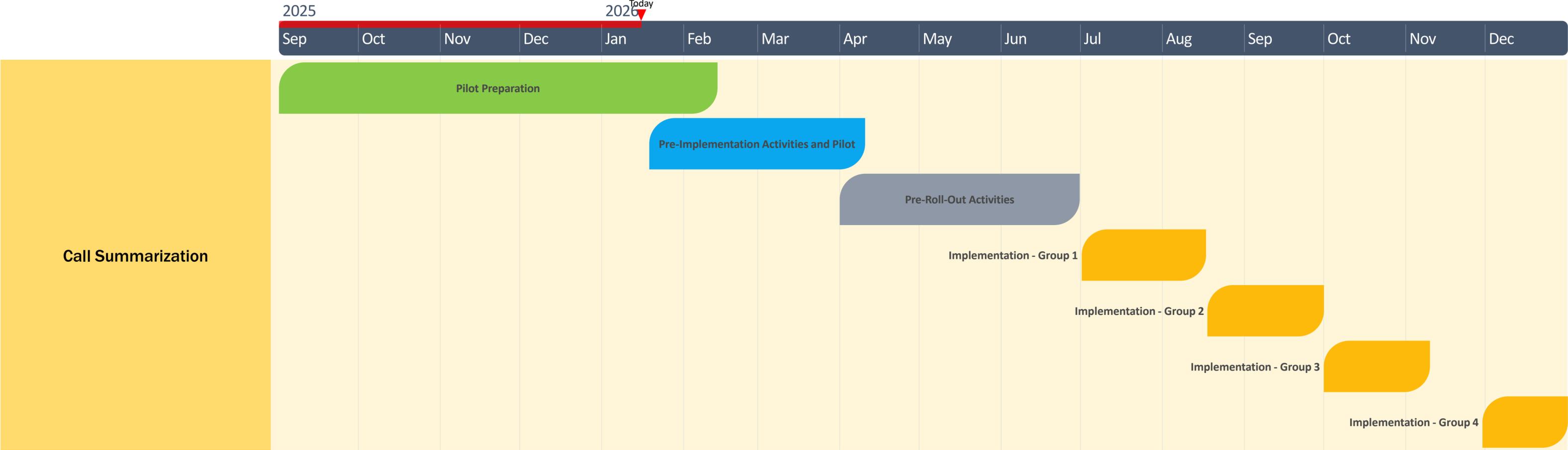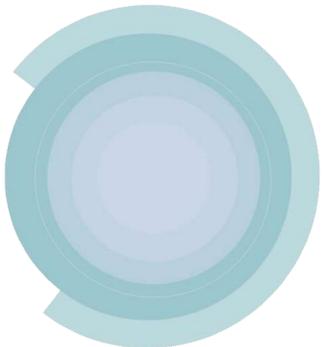
Call Summarization (GenAI) Update

Overview
Solution Path
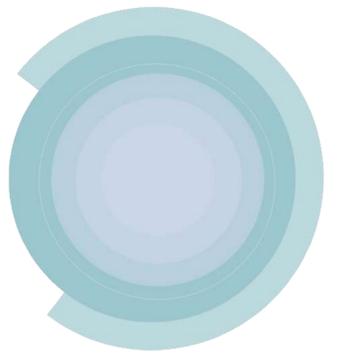
- Current call summarization solution
  - Relies on custom prompts and orchestration, which introduces complexity, latency, and cost
  - Is not configurable and scalable without significant investment in configuration changes
- Evaluate Amazon Connect Contact Lens Call Summarization as possible replacement / alternate option
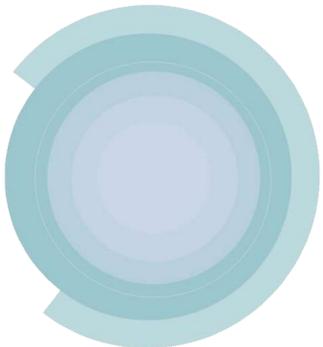
Call Summarization Timeline
Solution Path

	2025				2026 Today											
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

Call Summarization

Pilot Preparation

Pre-Implementation Activities and Pilot

Pre-Roll-Out Activities

Implementation - Group 1

Implementation - Group 2

Implementation - Group 3

Implementation - Group 4

AWS Dependencies
Preparation and Pilot

Pilot Preparation

Pre-Implementation Activities and Pilot

| Release	Target Availability Date	Accounts	AWS Dependencies	Status
Pre-Beta	-	AWS Staff Sandbox	• Coordinate with AWS to determine viability	Complete
Beta	Oct 15, 2025	Fresno, Orange, Placer, Los Angeles, San Bernardino – Test accounts	• Collaborate with AWS to test Beta version in CalSAWS test environments	In Progress
Pilot	January – April 2026*	Placer Production	• Update of the LLM • Product Support during Pilot	County Preparation Meetings Started
General Availability	Jun 2026**	Production	• Product Support	Not started

* Requires AWS update of the LLM to go live
** Requires AWS General Availability of the Product to go live
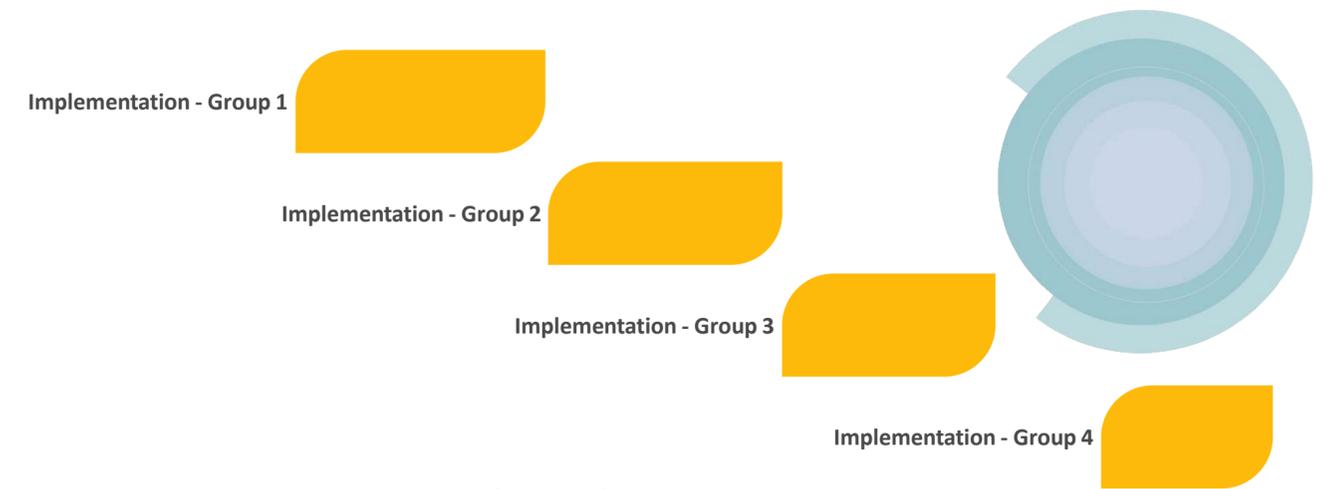
Implementation Approach

Pre-Roll-out Activities
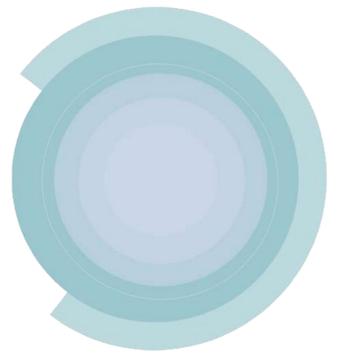
- ■ Pre-Roll-out Activities
  - Final Verification of Counties Opting In During this Roll-out
  - Data Gathering for Configurable Items
  - Technical Configuration
  - County Readiness Materials Review and Execution
  - Training Material Review
  - Train-the-Trainer Sessions

Implementation Approach
Roll-Out

- ## Roll-out Activities
  - Counties Complete Any Remaining Readiness Activities
  - Onsite Support
  - Post Implementation Support

- ## Implementation Plan
  - Four County Groups
    - ❖ Staggered counties in each group
    - ❖ Begin with the remaining two Counties who have already submitted requests
    - ❖ Schedule based on a geographical approach when possible

Implementation - Group 1

Implementation - Group 2

Implementation - Group 3

Implementation - Group 4

CalSAWS Procurement Updates

QA Services Procurement Timeline

Key Procurement Tasks

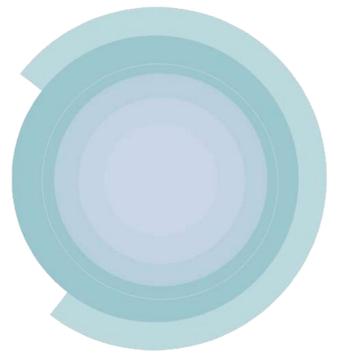|	QA Services Procurement Event	Dates
1	Release RFP	August 11, 2025
2	Conduct Bidder's Conference	August 19, 2025
3	Bidder Question and Answer Period	August 11 – September 2, 2025
4	Consortium Publishes Final Q&A and RFP Addendum	September 16, 2025
5	Proposals Due	October 20, 2025
6	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	October 21, 2025 – June 17, 2026
7	Prepare and Approve Vendor Selection Report	June 18 – July 23, 2026
8	Publish Notice of Intent to Award and VSR	July 24, 2026
9	Contract Negotiations	July 28 – August 5, 2026
10	State Contract Approval	August 10 – September 10, 2026
11	Federal Contract Approval	September 11 – November 10, 2026
12	Contingency Period	November 12 – 16, 2026
13	JPA BOD Approval	November 20, 2026
14	Contract Start	December 1, 2026
15	Transition-In Period (2 Months)	December 1, 2026 – January 29, 2027

Legal Services Procurement Timeline

Key Procurement Tasks

	Legal Services Procurement Event	Dates
1	Develop RFP	June 2, 2025 – January 27, 2026
2	Release RFP	January 30, 2026
3	Conduct Bidder's Conference	February 11, 2026
4	Bidder Question and Answer Period	February 2 – March 2, 2026
5	Consortium Publishes Final Q&A and RFP Addendum	March 10, 2026
6	Proposals Due	April 8, 2026
7	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	April 9, 2026 – September 29, 2026
8	Prepare and Approve Vendor Selection Report	September 30 – November 6, 2026
9	Publish Notice of Intent to Award and VSR	November 9, 2026
10	Contract Negotiations	November 12 – 25, 2026
11	Contingency Period	December 4, 2026 – January 11, 2027
12	JPA BOD Approval	January 15, 22 or 29, 2027
13	Contract Start	February 1, 2027
14	Transition-In Period (1 Month)	February 1 – 26, 2027

2026 CalSAWS Conference & JPA Member Representatives Meeting

June 2026 CalSAWS Conference
and Joint Meetings of the JPA Member Representatives and Board of Directors
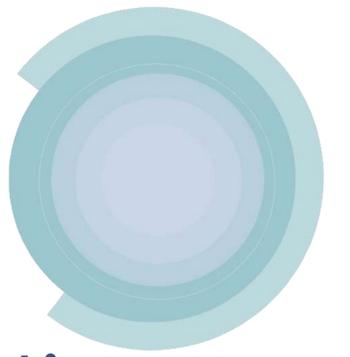

- ❖ **Registration opens: March 2, 2026**

- ❖ **Nominal fee for Vendors and Public**

- ❖ **Capacity is 300 Attendees**

- ❖ **Shorter sessions = More information**

- ❖ **NEEDED: Panel Participants**

Club CalSAWS
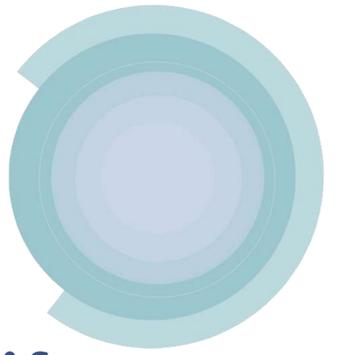
CLOSED SESSION

CLOSED SESSION

15. 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

CLOSED SESSION

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

Adjourn Meeting