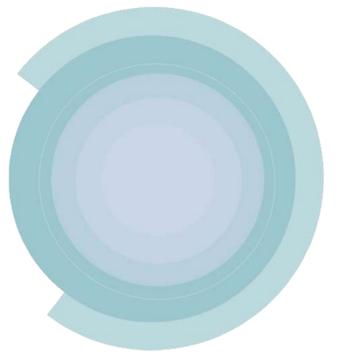# Project Steering Committee Meeting

February 19, 2026

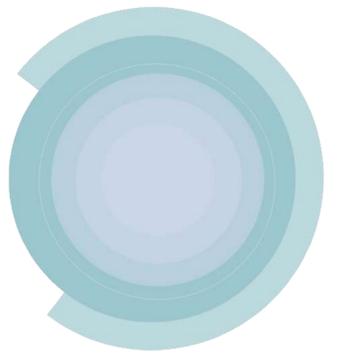**CalSAWS**

THE POWER OF 58

Agenda

1. Call Meeting to Order.

2. Confirmation of Quorum and Agenda Review.

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

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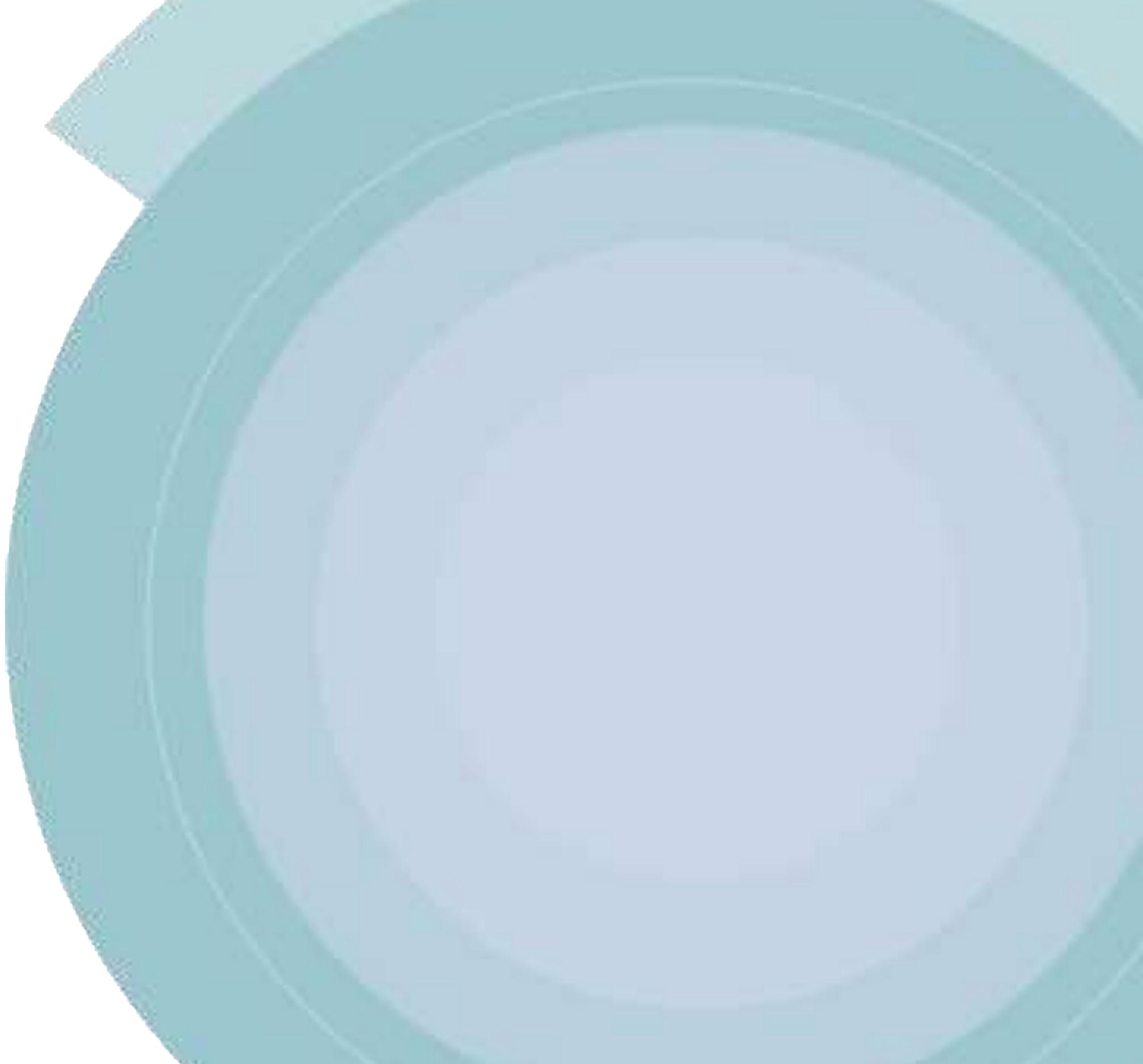
Action Items

Action Items
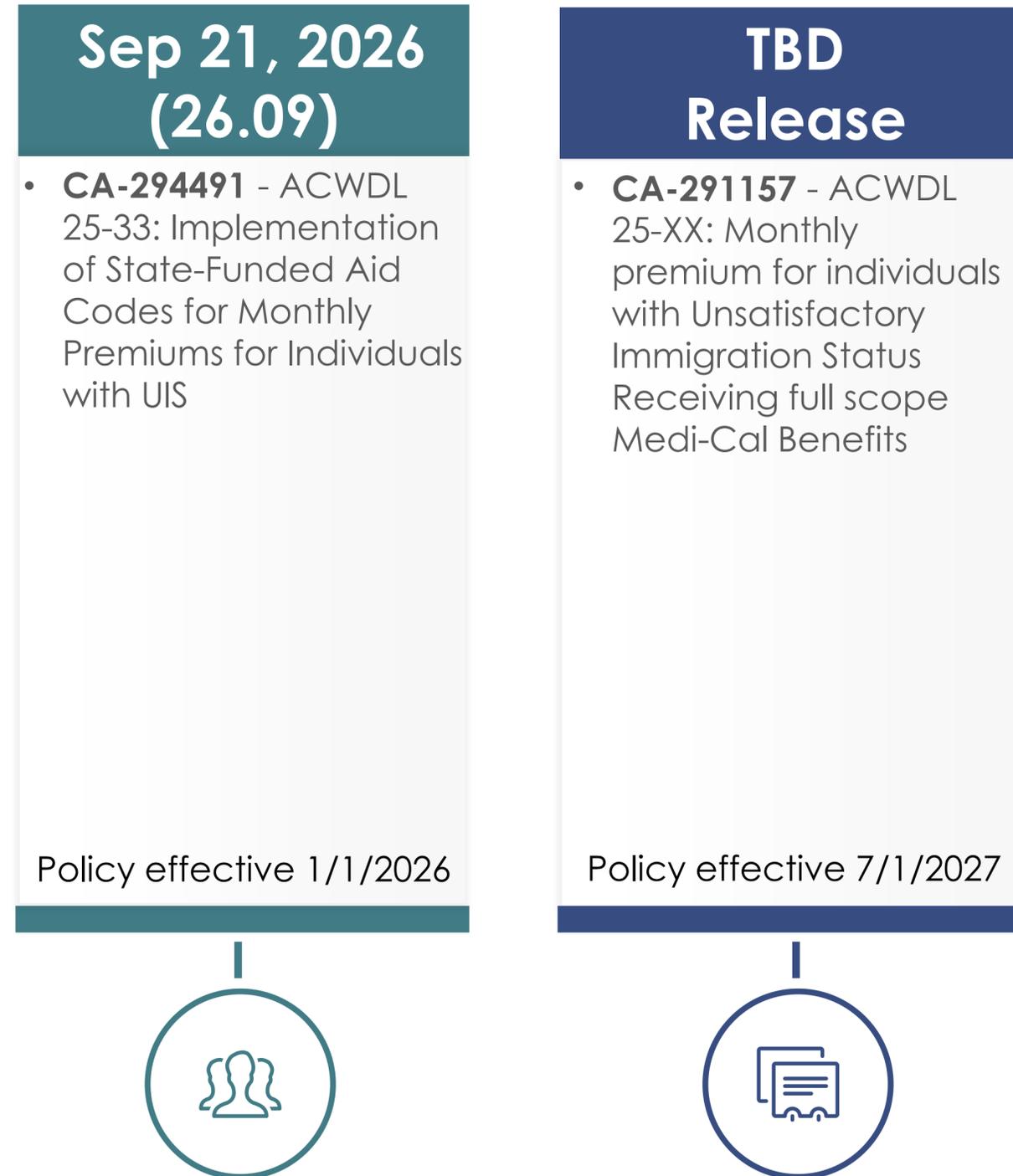
4. Approval of the Minutes and review of the Action Items from the November 20, 2025 PSC Meeting.

Informational Items

HR-1 and Policy & Release Update

Medi-Cal State Budget Policy Roadmap*

Sep 21, 2026 (26.09)

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

Policy effective 1/1/2026

TBD Release

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

Policy effective 7/1/2027

Target releases are subject to change.

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

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

Policy effective 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*

Mar 31, 2026 (26.03.31)

- **CA-294574** - CalFresh Non-Citizen Eligibility Updates

Policy effective 4/1/2026

Apr 30, 2026 (26.04.30)

- **CA-296476 -** Add CF 377.11E to the CF RE and CWCF RE Packets

Policy effective 10/1/2026

May 18, 2026 (26.05)

- **CA-294575**- 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
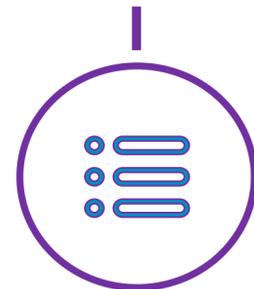
Target releases are subject to change.

CalFresh May Revise & HR-1 Policy Roadmap*

Jul 20, 2026 (26.07)

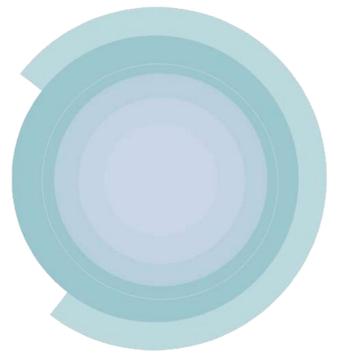- **CA-294653** - ACL 25-68 Add CF 1 Threshold Languages

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

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'

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

CalSAWS | Project Steering Committee

12
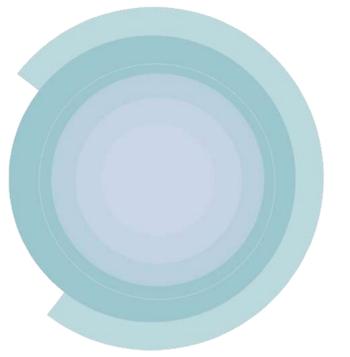
CalFresh System Changes In Progress

Intended to help address CalFresh Error Rates

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
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

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

Upcoming Outreach Efforts
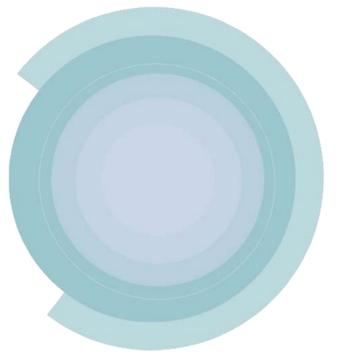
Payment Verification System (PVS):

SCRs CA-284174 & CA-293332 - Functionality demonstrations for Automated Process of Payment Verification System (PVS)- March 11, 2026 | 10:00 AM – 12:00 PM.
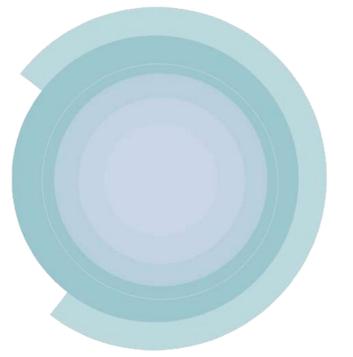
Resource Updates:

- Job aids
- The team is assessing the need for a quick guide

ABAWD Updates:

SCR CA-294575 - Functionality demonstrations for changes to ABAWD Exemptions and Expiration of Statewide Waiver – Date is TBD

- Job aid, Quick Guides and WBT updates

HR-1 CF Processing Workgroup

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
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

(Requirement Themes)

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
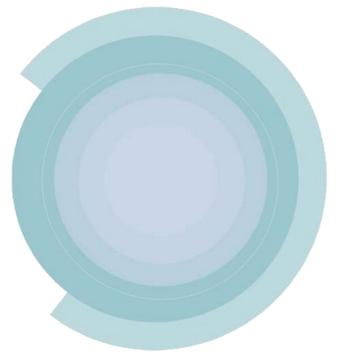
➢ **CA-296569:** CalFresh Processing HR1 Work Group – Automated System Error Reviews (Phase 1)

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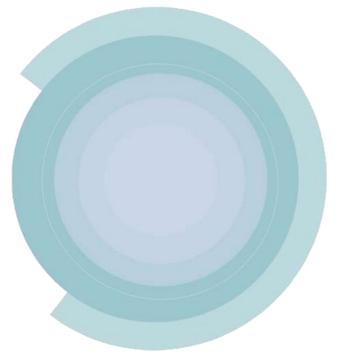
🎯 **Objective:** Gather and prioritize CalSAWS HR-1 Ad-Hoc reporting requirements to assist the counties to visualize the populations impacted by HR-1 policies.

🤝 **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: CF ABAWD

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

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

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

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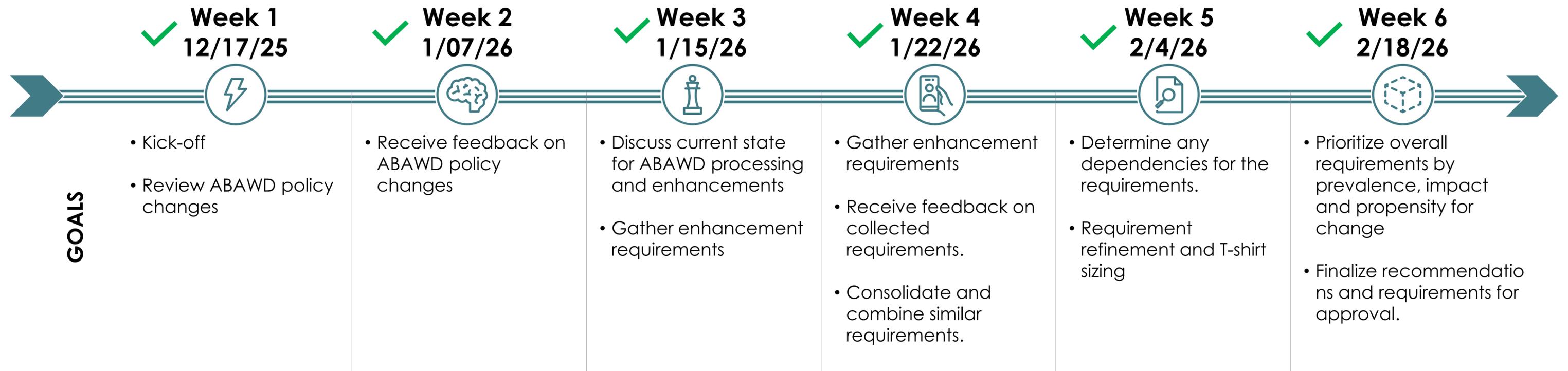
HR-1 ABAWD Enhancement Workgroup
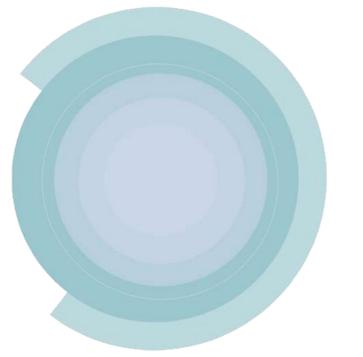
Objective: Gather and prioritize CalSAWS system enhancements and requirements related to ABAWD that will assist counties with implementing the HR1ABAWD policy changes.

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

Timeline and Goals:

GOALS

Week 1
12/17/25
- Kick-off
- Review ABAWD policy changes

Week 2
1/07/26
- Receive feedback on ABAWD policy changes

Week 3
1/15/26
- Discuss current state for ABAWD processing and enhancements
- Gather enhancement requirements

Week 4
1/22/26
- Gather enhancement requirements
- Receive feedback on collected requirements.
- Consolidate and combine similar requirements.

Week 5
2/4/26
- Determine any dependencies for the requirements.
- Requirement refinement and T-shirt sizing

Week 6
2/18/26
- Prioritize overall requirements by prevalence, impact and propensity for change
- Finalize recommendations and requirements for approval.

Release and Policy Update
Upcoming Releases

February	March	April	May
CalHEERS Baseline (2/23/2025) and Priority Releases	**Baseline (3/23/2026) and Priority Releases**	**Priority Releases**	**Baseline (5/18/2026) and Priority Releases**

February — CalHEERS Baseline (2/23/2025) and Priority Releases

2/07/2026:
- CalHEERS updates for UIS Protection and Retro grace period (CA-296582, CA-296448, & CA-296415)

2/14/2026:
- 2026 Federal Poverty Levels for Medi-Cal COLA Values (CA-290452)

2/23/2026:
- Add California Residency Verification (CA-290537)

March — Baseline (3/23/2026) and Priority Releases

3/01/2026:
- 2026 Federal Poverty Levels for Medi-Cal COLA Batch EDBC (CA-290454)

3/23/2026:
- Add 9Y Aid Code for Child in Treatment Facility with Parent (CA-233675)
- Update CalFresh and CalWORKs Indigent Functionality (CA-275191)
- Create a new MEDS Alerts Performance Standards Dashboard (CA-291166)

3/31/2026:
- HR 1 ACL 25-50 Changes to CalFresh Eligibility for Most Lawfully Present Non-Citizens (CA-294574)

April — Priority Releases

4/30/2026:
- HR 1 Add CF 377.11E to the CF RE and CW/CF RE Packets (CA-296476)

May — Baseline (5/18/2026) and Priority Releases

5/17/2026:
- ACL 25-50 H.R. 1 Changes to ABAWD Exemptions and Expiration of Statewide Waiver (CA-294575)
- H.R. 1 - ACL 25-74 CF 886 to Inform CalFresh Households About Their Work Registrant and ABAWD Status (CA-291366)
- ACWDL 22-26- Eligibility and Redetermination Requirements for Incarcerated Members (CA-273391)

Release and Policy Update
Upcoming Releases – 26.03

TESTING

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

RELEASE COMMUNICATION

Major Upcoming Changes (MUC): Draft 1/30/2026
Final: 2/10/2026t

Webcast: 3/3/2026

Newsletter and Release Notes: Week of 3/16/2026

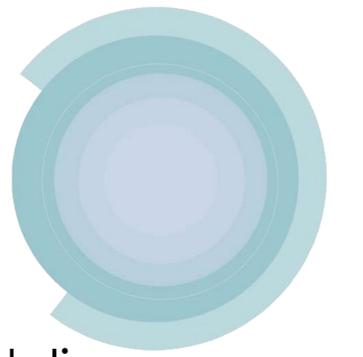**DEPLOYMENT**

Greenlight: 3/18/2026

Deployment: 3/22/2026

POST RELEASE

Post-Release Daily calls are scheduled for: 3/23/2026 – 3/25/2026

Workload Management Updates

Workload Management Redesign

Objective: Enhance CalSAWS to assist staff in assigning Intake appointments to Eligibility Workers, scheduling and rescheduling Intake appointments, establishing worker availability, and tracking Intake appointments.
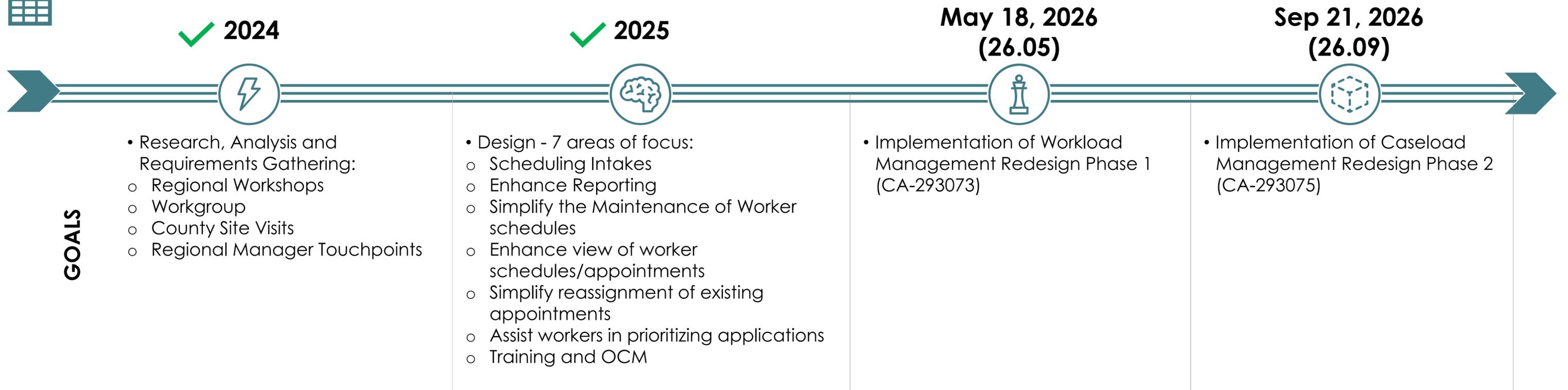
Representation: 44 counties; **6** regions; and CalSAWS leadership

- **6 four-hour regional workshops** with **10-40** participants each (**122** total)
- **Recruited workgroup participants** from each region through CRFI 23-128
- **Met with Regional Managers** prior to each regional workshop to research key county concerns
- Conducted **7 site visits** at Stanislaus, Merced, San Bernardino, Sacramento, Imperial, Riverside, and Santa Clara

Timeline and Goals:

✓ 2024	✓ 2025	May 18, 2026 (26.05)	Sep 21, 2026 (26.09)
• Research, Analysis and Requirements Gathering: o Regional Workshops o Workgroup o County Site Visits o Regional Manager Touchpoints	• Design - 7 areas of focus: o Scheduling Intakes o Enhance Reporting o Simplify the Maintenance of Worker schedules o Enhance view of worker schedules/appointments o Simplify reassignment of existing appointments o Assist workers in prioritizing applications o Training and OCM	• Implementation of Workload Management Redesign Phase 1 (CA-293073)	• Implementation of Caseload Management Redesign Phase 2 (CA-293075)

GOALS

Workload Management – Phase 1
OCM & Project Activities at a Glance

ACCOMPLISHED	ON THE HORIZON

January

Project
- Phase 1 Design approved by Consortium & County stakeholders
- Started build of functionalities/features

OCM
- Developed OCM Plan based on project timeline & approved design
- Collected change impact data based on the future state for Caseload Management Phase 1

February

Project
- Completing the build of functionalities/features
- Preparing for testing

OCM
- Identifying key differences between as-is and to-be functionalities, and analyzing current vs. future state changes to identify impacts to county
- Informing counties of key project updates, activities, and resources via monthly bulletin series

March

Project
- Begin system testing activities
- System will be available to pull visuals for Enhanced Regional Demonstration preparations

OCM
- Coordinate logistics and preparing for Enhanced Regional Demonstrations
- Distribute recommended readiness activities to Regional Managers for Go-Live preparation
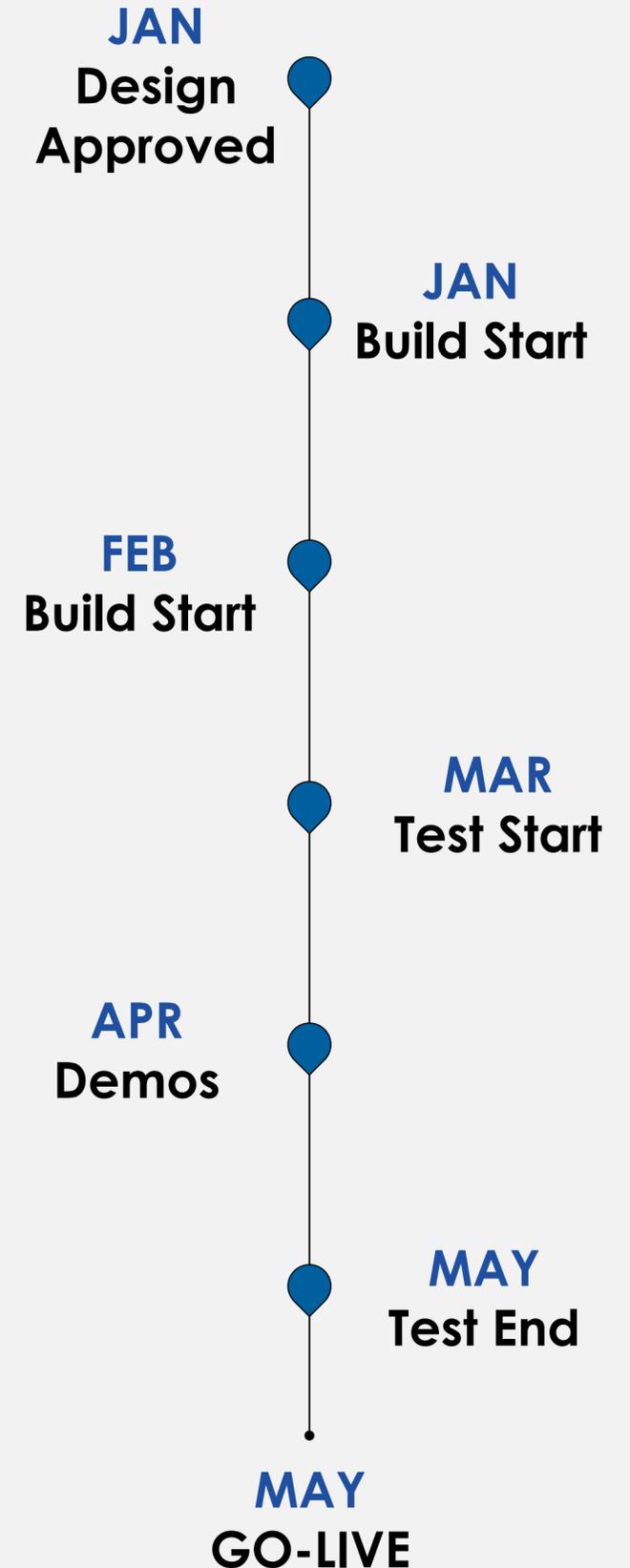
April

Project
- Continuation of system testing
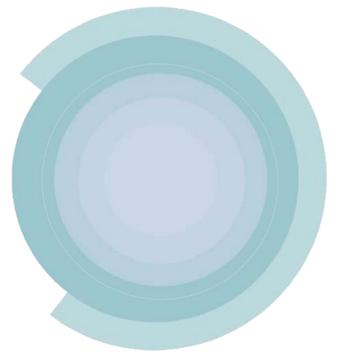- Begin county validation activities

OCM
- Host & facilitate Enhanced Regional Demonstration with support of functional/system SMEs
- Monitor county readiness via feedback from pulse checks and checklist activities and distribute recommended readiness materials to the counties

CalSAWS | Project Steering Committee

PROJECT TIMELINE

- **JAN** — Design Approved
- **JAN** — Build Start
- **FEB** — Build Start
- **MAR** — Test Start
- **APR** — Demos
- **MAY** — Test End
- **MAY** — GO-LIVE

BenefitsCal Update
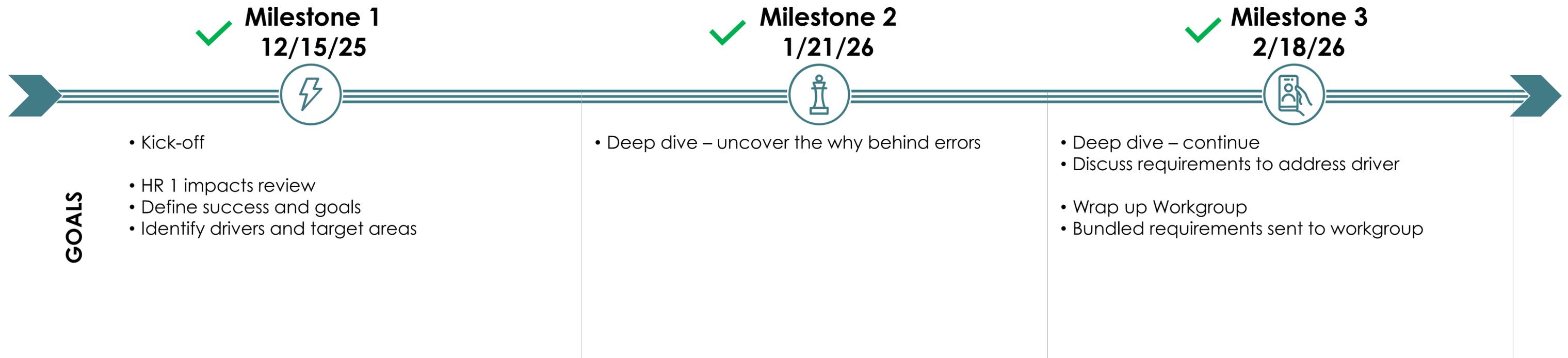
HR-1 Advocate CF Processing Workgroup

Objective: Gather actionable insight around the causes and impacts of the CalFresh Error Rates, which can be validated by customers.
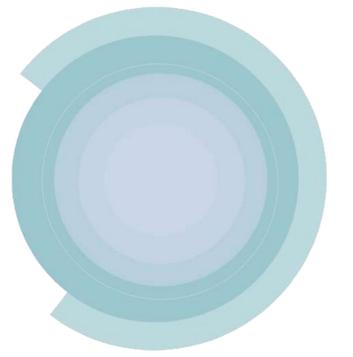
Representation: Advocate Stakeholders, CDSS, CWDA and CalSAWS leadership

Timeline and Goals:

Milestone 1
12/15/25

Milestone 2
1/21/26

Milestone 3
2/18/26

GOALS

- Kick-off

- HR 1 impacts review
- Define success and goals
- Identify drivers and target areas

- Deep dive – uncover the why behind errors

- Deep dive – continue
- Discuss requirements to address driver

- Wrap up Workgroup
- Bundled requirements sent to workgroup

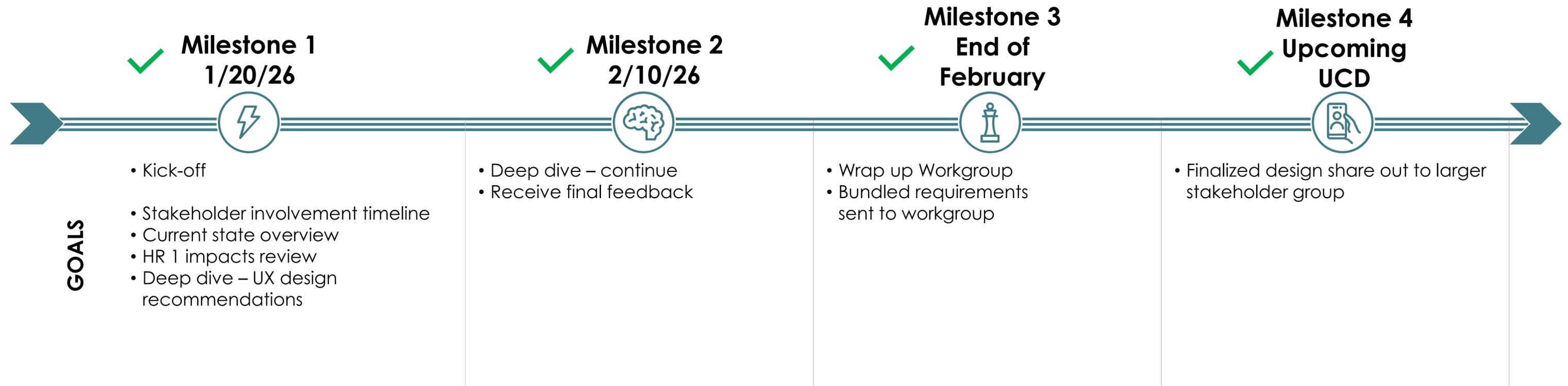# HR-1 Advocate ABAWD Workgroup

Objective: Leverage UI/UX design principles, enabling stakeholders to identify improved solutions that help customers more easily understand and meet ABAWD requirements.
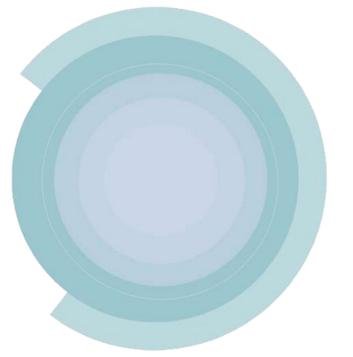
Representation: Advocate Stakeholders, CDSS, CWDA and CalSAWS leadership

Timeline and Goals:

Milestone 1
1/20/26

Milestone 2
2/10/26

Milestone 3
End of February

Milestone 4
Upcoming UCD

GOALS

- Kick-off

- Stakeholder involvement timeline
- Current state overview
- HR 1 impacts review
- Deep dive – UX design recommendations

- Deep dive – continue
- Receive final feedback

- Wrap up Workgroup
- Bundled requirements sent to workgroup

- Finalized design share out to larger stakeholder group
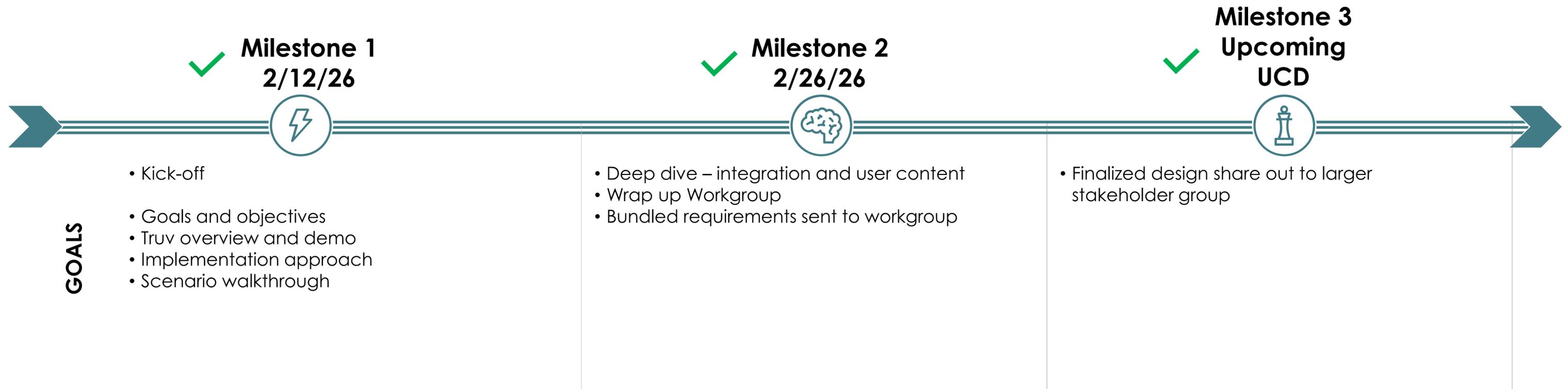
HR-1 Advocate Truv Workgroup

Objective: Provide a foundational understanding of TRUV, including its purpose and value, while identifying and discussing key policy considerations for integration and user content.
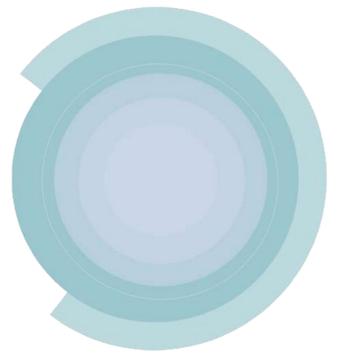
Representation: Advocate Stakeholders, CDSS, DHCS, CWDA and CalSAWS leadership

Timeline and Goals:

Milestone 1
2/12/26

Milestone 2
2/26/26

Milestone 3
Upcoming
UCD

GOALS

- Kick-off

- Goals and objectives
- Truv overview and demo
- Implementation approach
- Scenario walkthrough

- Deep dive – integration and user content
- Wrap up Workgroup
- Bundled requirements sent to workgroup

- Finalized design share out to larger stakeholder group

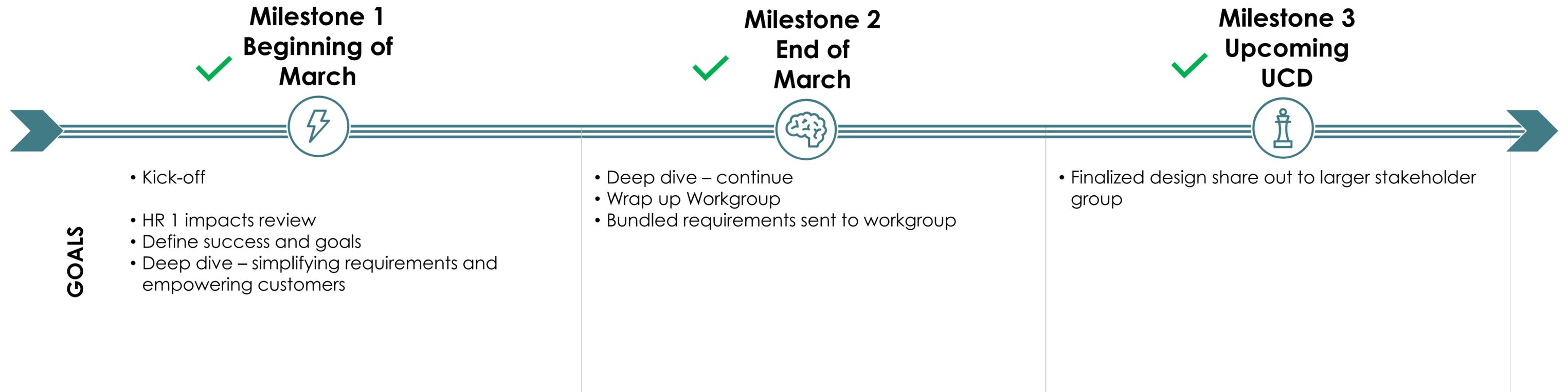# HR-1 Advocate Medi-Cal Workgroup

Objective: Leverage UI/UX design principles, enabling stakeholders to identify improved solutions that help customers more easily understand and meet Medi-Cal work and reporting requirements.
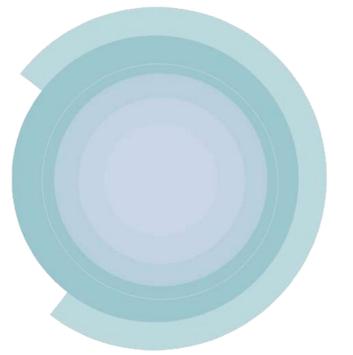
Representation: Advocate Stakeholders, DHCS, CDSS, CWDA and CalSAWS leadership

Timeline and Goals:

Milestone 1 **Beginning of** **March**	**Milestone 2** **End of** **March**	**Milestone 3** **Upcoming** **UCD**
✓	✓	✓

GOALS

- Kick-off

- HR 1 impacts review
- Define success and goals
- Deep dive – simplifying requirements and empowering customers

- Deep dive – continue
- Wrap up Workgroup
- Bundled requirements sent to workgroup

- Finalized design share out to larger stakeholder group

BenefitsCal – 2025 Key Metrics

On July 1st, California retired GCF and completed its transition entirely to BenefitsCal, unifying social service access under one streamlined platform.

Total Applications Submitted

2.2M

households took the first step to receive food, cash, and/or medical assistance.

1.5M applications submitted by **Customers**.*

685K applications submitted by **CBOs**.

Daily Logins

As high as **430k Daily**

Between **200k – 250k on Weekdays**

Customer Accounts Created

1.5M

customers created accounts to apply for and manage their benefits on BenefitsCal.

CBO Accounts Created

2.5K

CBOs are now equipped to assist customers on BenefitsCal.

BenefitsCal Activity**
Total Count (and BC percentage) of Submissions from All Channels

Applications

1.9M (57%)	325K (69%)	1.5M (43%)
CalFresh	CalWORKs	Medi-Cal

Renewals

1.5M (33%)	285K (36%)	1.7M (30%)
CalFresh	CalWORKs*	Medi-Cal

* Includes CW/CF RE Combo Submissions
** As of November 2025
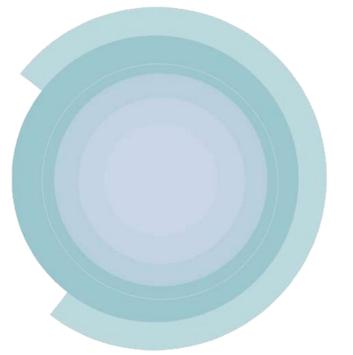
Documents Uploaded

29.5M

sheets of paper saved from printed verifications + time saved by reducing steps to share documents.

BenefitsCal – 2025 Annual Roundup

Implemented 100+ enhancements.

Key modules in focus this year:

Document Upload

Key Features Enhanced:

- Upload multiple document types in a single session,
- Consistent upload process across different flows,
- Expanded list of document types

Measured Impacts:

- Drop-off rate decreased from 11.1% to 1.6%,
- Conversion rate increased by 6%,
- Average session time decreased by 6 minutes

Customer Dashboards

Key Features Enhanced:

- Improved EBT transaction and deposit display
- Re-organized elements on customer and CBO dashboards

Measured Impacts:

- 57.7% less time spent on transaction history,
- 37.7% less manual transaction entries during theft reporting.

Account Creation & Login

Key Features Enhanced:

- Improved messaging for locked and inactive accounts.
- Simplified account creation process for CBOs and customers.
- Streamlined account creation process with deferring mobile verification

Measured Impact:

- 18.5% reduction in login failures
- 9.6% reduction in errors during account creation.
- 37% increase in daily accounts created this year

"It's convenient: I submit my documentation from anywhere. Avoid the awkward, anti-social anxieties that come with having to go down there. Saves time and money. And ultimately my mental health!" - BenefitsCal Customer

"The BenefitsCal (BC) website has been very helpful! It's a much more efficient way to fill out paperwork and upload documents. It also lets me check the status of my cases anytime." - BenefitsCal Customer

"For CalFresh, it's great, I get all the info I need, I can check my balance anytime, and I can also see my purchases, or at least where I purchased items from, which is very helpful." – BenefitsCal Customer

"I like BenefitsCal, how securely we can upload any document from home. And our all information saved securely. We can contact health care workers and they replied so quickly." - BenefitsCal Customer
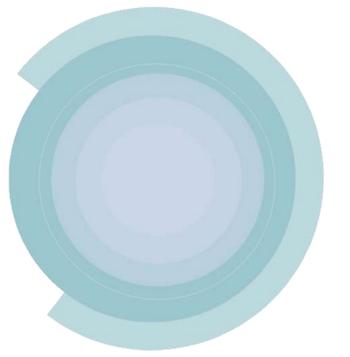
CalSAWS

BenefitsCal
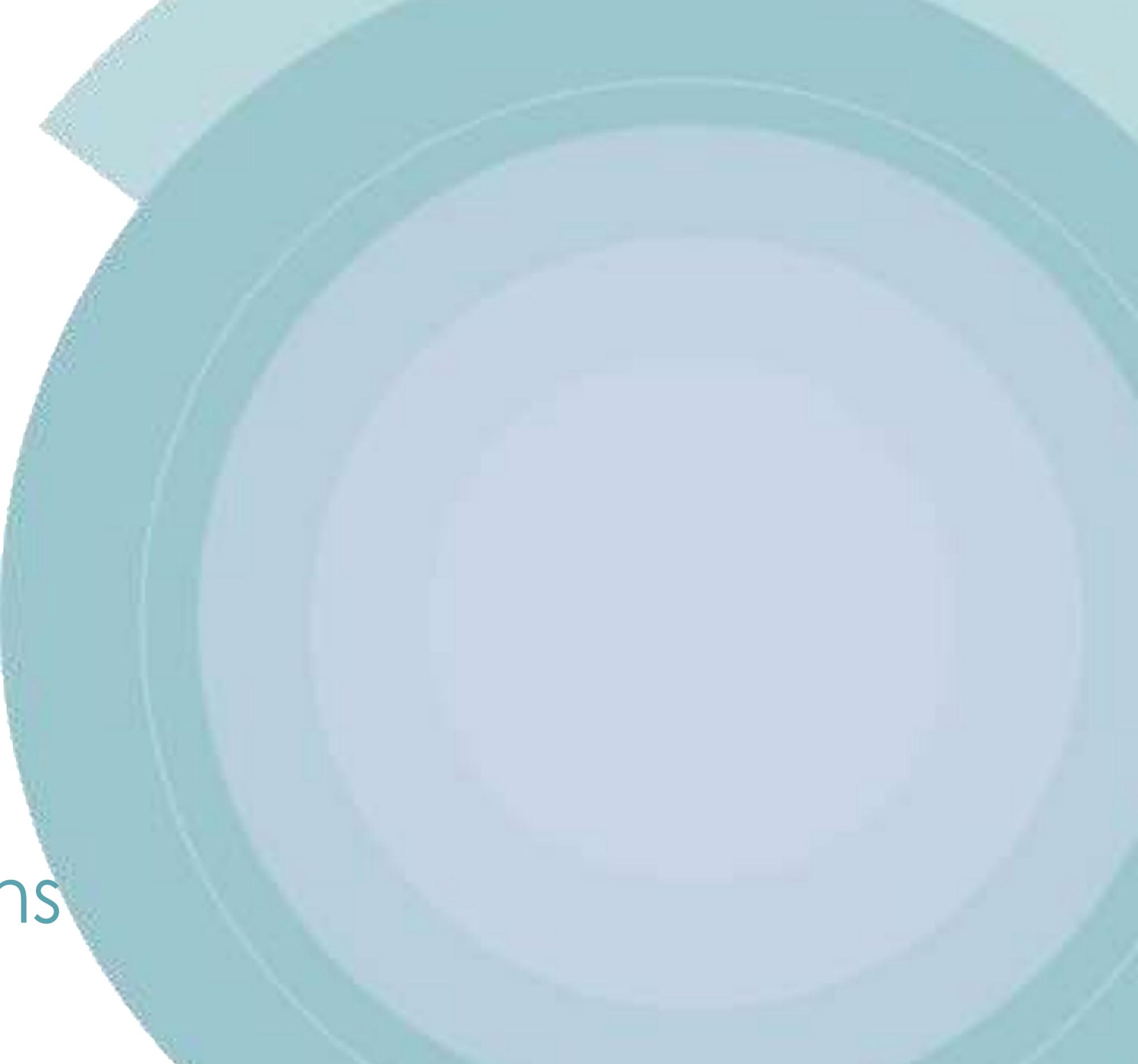
Collaboration Model – Advisory Group Recommendations

Final Prioritization Summary

Advisory Group Prioritization Meeting (Jan 2026)

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

Note: Listed in priority order

Initiative Requests 1 and 2

CWDA/Counties
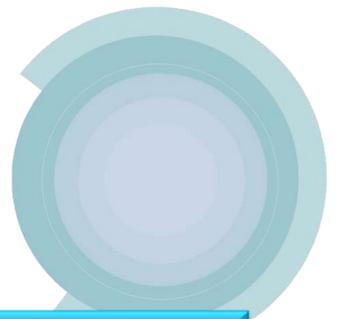
Customer Change Reporting Assistant

Provide guided support to customers reporting a change through BenefitsCal

- Customer Assistant would help the customer to report all information needed for eligibility staff to act on changes (prompt, nudge, etc.)
- Example:
  - Customer starts to report address change. The Customer Assistant would prompt the customer to include in the report any changes to expenses and household composition
- Benefit: Reduces need for further customer contact, helps avoid delays in processing and potential discontinuances
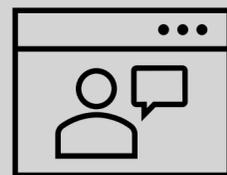
### Real Time Secure Upload and E-Signature Link for Client Assistance

Explore new method for workers to obtain documents from clients

- Allow real-time document collection using one-time secure link generated by the worker
- Links would allow clients to upload or e-sign required documents
- Documents would sync automatically to BenefitsCal, ECCP and CalSAWS, allowing the worker to review documents while in contact with the client
- Benefit: Remove document submission barriers, improve First Contact Resolution, reduce reliance on third party tools like Adobe Sign and separate texting platforms

Initiative Requests 3 and 4

CWDA/Counties; Advocate Partners
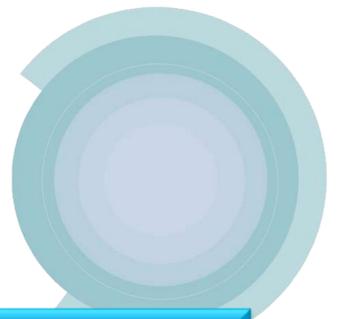
Enhanced Upload Categorization in BenefitsCal

Redesign the document upload process to include a structured categorization model that organizes documents into broader categories with specific subcategories

- Enhanced Categorization
  - Introduce tiered selection of document categories and subcategories
  - Example: Dedicated "Proof of Residence" category
- Improved Guidance
  - Update help text, tooltips, and upload instructions to provide clear examples of acceptable documents for each category
- Smarter Upload Flow
  - Require subcategory selection before file upload, group uploaded documents by type in the summary view, and allow users to add notes for additional context

Document Imaging

Explore opportunities to improve the Document Imaging process

- Multiple case numbers shown in customer's account
  - Improve guidance to increase successful submission to the correct case so appropriate worker can process
- Improve clarity around "upload" vs "submit"
  - Provide alert if customer attempts to leave page before documents have been submitted
- Improve categorization/indexing of Release of Information so it is easily found by Eligibility Workers (EWs)
- Engage EWs to uncover any barriers to locating documents and comments, including refined training
- Provide guidance for compressing documents or increase allowable size of images

Initiative Requests 5 and 6

DHCS; Advocate Partners
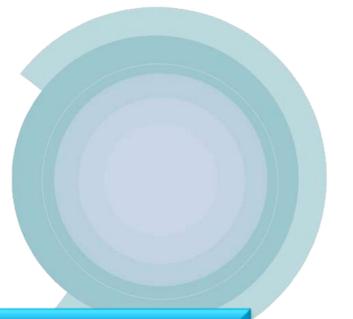
Improve Application and Renewal Flow

Explore options to improve the Medi-Cal application and renewal process

- Reduce the number of screens in the application and renewal flow
- Include only program relevant questions
- Increase likelihood of e-verifications
- Increase the use of dynamic functionality to allow the application and renewal to be more intuitive to the user completing the process

Language Access

Explore opportunities to improve Language Access on BenefitsCal

- Allow users to type in their own language characters
  - Enable alternative characters, send applications (and other documents)that use these characters as a PDF to the worker
- Allow users of BenefitsCal to report a screen if it contains translation errors
  - Advocates and state partners can work closely to identify protocols for reviewing feedback and how/when to action
- Explore moving translation toggles to the top of the page and/or add a universally recognized translation symbol for the toggle option
- Explore possibility of advising users using a browser translation to switch to the language toggle option so translations will be more accurate

Initiative Requests 7 and 8

Advocate Partners; CDSS
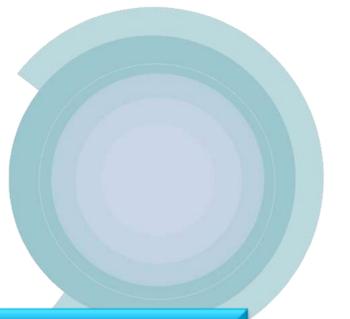
Account Creation/Login

Explore options to improve Account Creation and Login experience for customers

- Enhance Multi-Factor Authentication (MFA) by adding a phone call option to receive the MFA code, create guidance if MFA is not working, allow identification of a trusted device to reduce frequency of when MFA code is required, improve guidance to alert customers of extra steps when changing MFA method
- Improve Account Creation guidance, such as adding audio translations to videos
- Add Application Number to be used to set up an account, with an automatic update when case number is created
- Explore/research other opportunities to improve the user experience as a whole

Driving Customer Action

**Explore options to enhance the BenefitsCal customer dashboard**

- Highlight upcoming deadlines, required actions, and document upload status in real time
- Ensure self-service tools are available to facilitate key actions, like required change reporting during the certification period
- Implement an eligibility calculator widget to allow customers to anticipate how case changes could impact their benefits, and whether those changes are required or voluntary reports
- Integrate FAQs and other help features
- Explore if some elements of this IR can be worked into the Customer Change Reporting Assistant

Next Steps

CalSAWS teams collaborate on building Initiative Request project type in Jira (resulting SCRs will be tied to this new project type for tracking purpose and reporting)
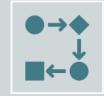
The UCD process is initiated

BenefitsCal team will meet to work resulting projects into the roadmap

Updates at Quarterly Stakeholder meetings

Mid-year checkpoint - June 2026

1

2

3

4
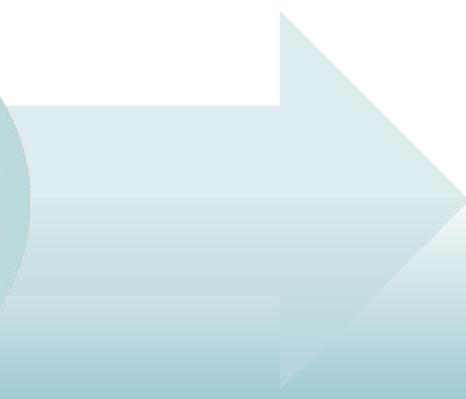
GenAI Call Summarization Update

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
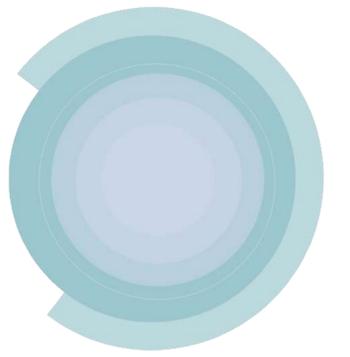## Solution Path

	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
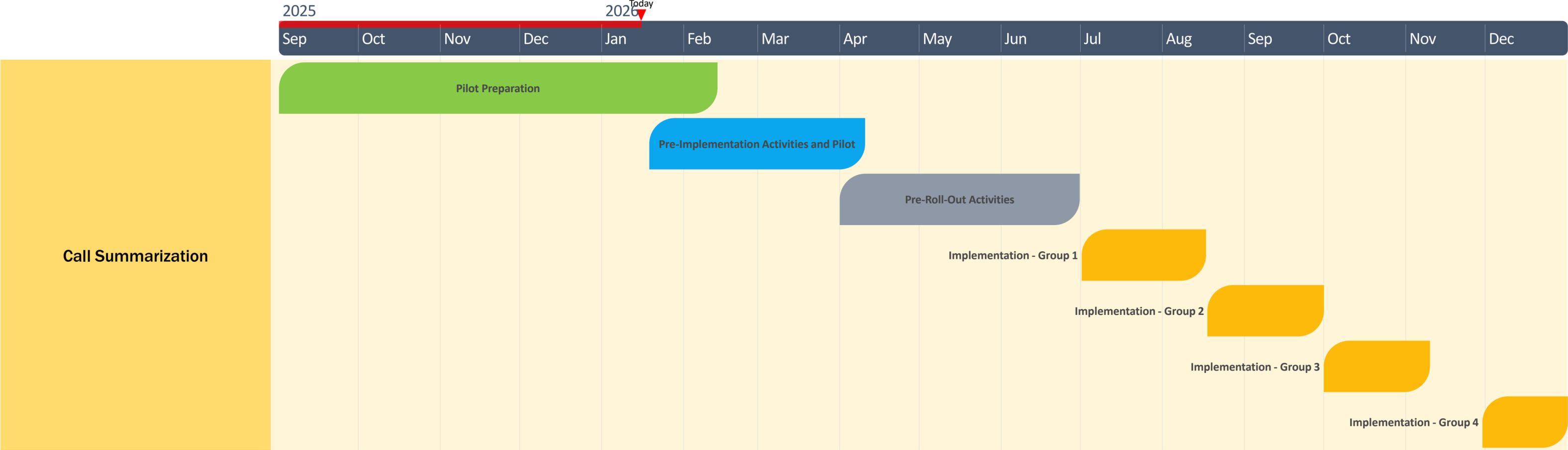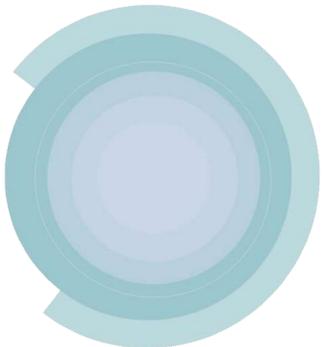
Pre-Implementation
Preparation and Pilot
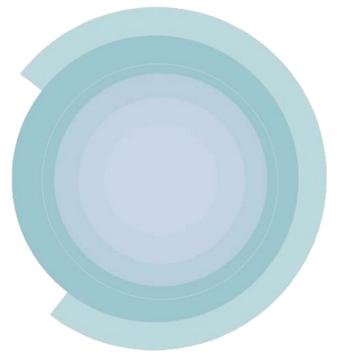
Release	Target Timeframe	Activities and Dependencies	Status
Technical Solution Review	September – October 2025	• Review existing configuration and architecture	Complete
AWS Coordination and Solution Testing	November 2025 – March 2026	• Collaborate with AWS to verify solution • Complete solution integration • Complete solution testing	In Progress
Pilot	January – April 2026	• County Readiness • Product Support during Pilot	County Preparation Meetings Started
Rollout	Jun 2026*	• Product Support	Not started

* Requires successful conclusion of the pilot to go live

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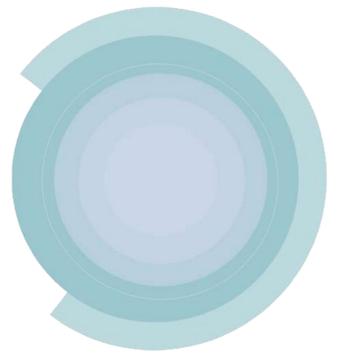
- ## Pre-Roll-out Activities
  - Final Verification of Counties Opting In During this Roll-out
  - Data Gathering for Configurable Items
  - Technical Configuration
  - County Readiness Materials Review and Execution
  - Training Material Review
  - Train-the-Trainer Sessions

Implementation Approach
Roll-Out
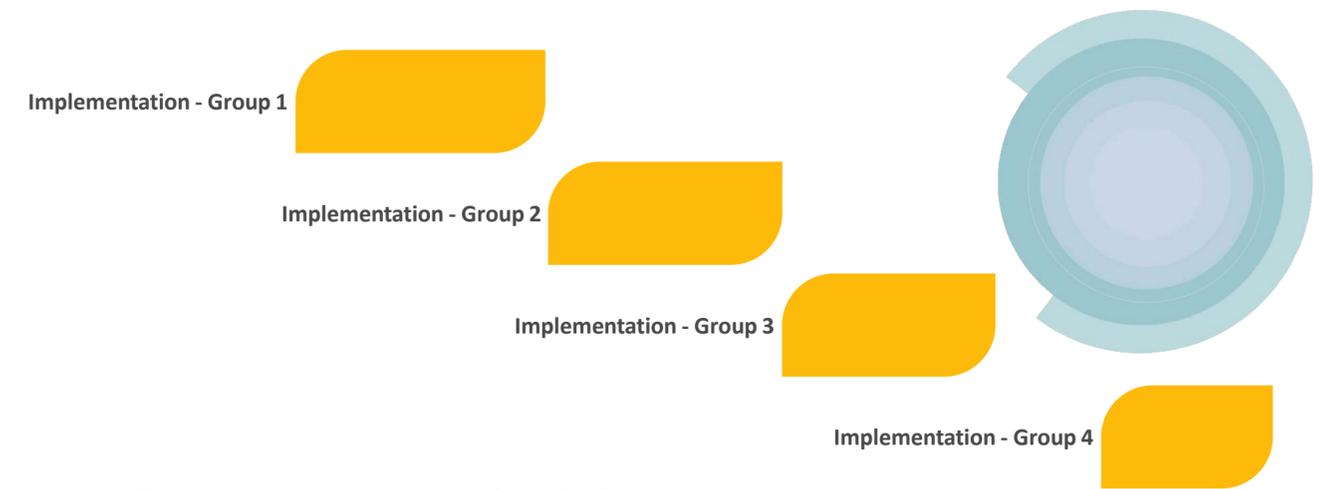
- Roll-out Activities
  - Counties Complete Any Remaining Readiness Activities
  - Onsite Support
  - Post Implementation Support
- Implementation Plan
  - Four County Groups
    - Staggered counties in each group
    - Begin with the remaining two Counties who have already submitted requests
    - Schedule based on a geographical approach when possible

Implementation - Group 1

Implementation - Group 2

Implementation - Group 3

Implementation - Group 4

CalSAWS
Learning
Exchange
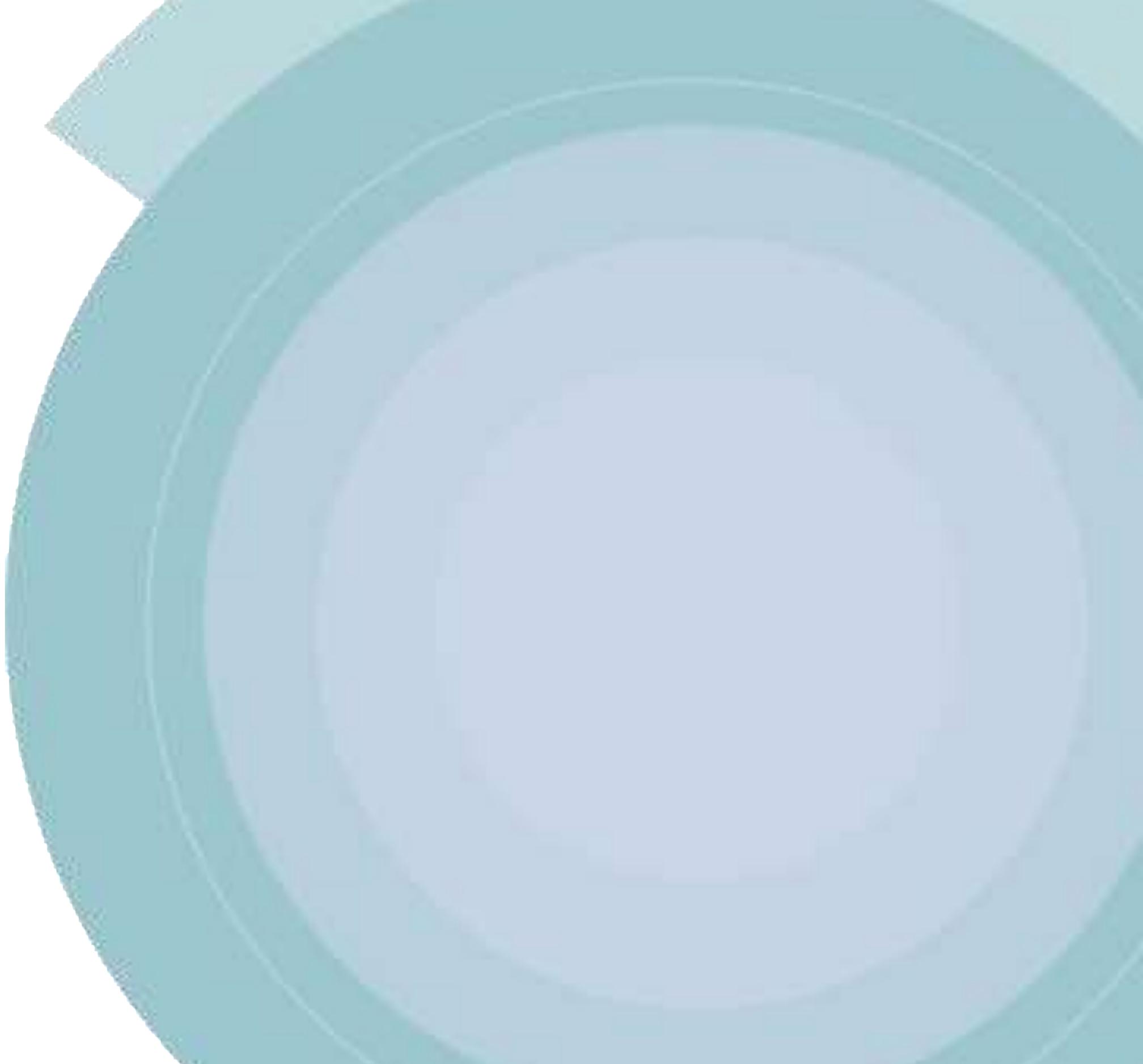
CalSAWS Learning Exchange Sessions

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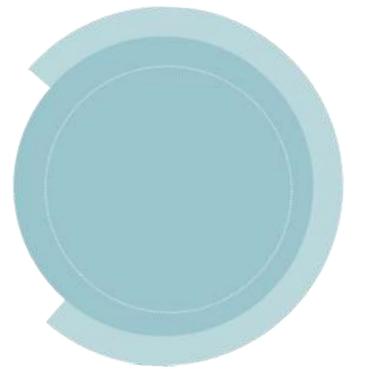
- CalSAWS Learning Exchange (CLE) sessions provide timely, relevant education for regions on identified topics and allows for Q&A with counties.

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

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

- Align with Project teams on the CalSAWS Roadmap to avoid redundancies and ensure identification of relevant topics gets addressed.

CalSAWS Learning Exchange Sessions

February CLE- Communication Portal
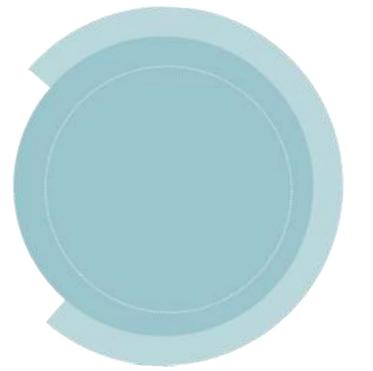
The **February** CalSAWS Learning Exchange is focused on the **Communication Portal** and will be held on **February 17, 18 and 19, 2026**. The Communication Portal CLE will provide the end user with an overview and demonstration of the new CalSAWS Communication Portal. The Communication Portal will replace the current Web Portal. The goal upon conclusion of the session is for county staff, who currently have access to Web Portal, to have gained the knowledge to confidently use the new Communication Portal.

- We will track **participants** attended
- We will track **counties** represented
- Sessions at times also include State Partners (CDSS)

Path to the CalSAWS Learning Exchange session materials will be included upon completion of the session. All CLEs are stored here:

CalSAWS Web Portal > Resources > CalSAWS Learning Exchange > Click desired CLE session

CalSAWS Learning Exchange Sessions

CLE Planning Schedule 2026
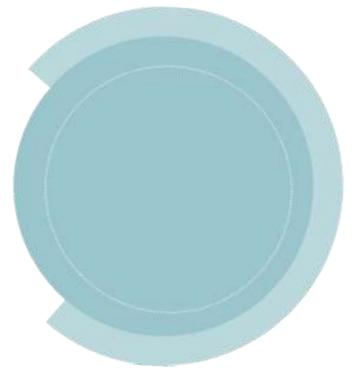
Note: Mar/Apr- Possible CLE collaboration with CDSS on CalFresh Payment Error Rate (PER)

February 2026-
Communication Portal
Sessions
2/17/26
2/18/26
2/19/26

April 2026-
Skipped Issuance Report
Sessions
TBD
TBD

August 2026 – Collections
Sessions
TBD
TBD

December 2026 – No CLE
Sessions
None Scheduled

March 2026-
Delegated Administrators*
Sessions
3/17/26
3/18/26

June 2026 – RCM/Workgroup Member/SME Overview
Sessions
TBD
TBD

CalSAWS Conference:
June 25-26

October 2026 – Self Service for PPOCs
Sessions
TBD
TBD

2027 Plan to Date:
- Feb 2027- Topic/Dates TBD

CalSAWS |Learning Exchange

48

Next Steps

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

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

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

1 2 3 4

Transition Update
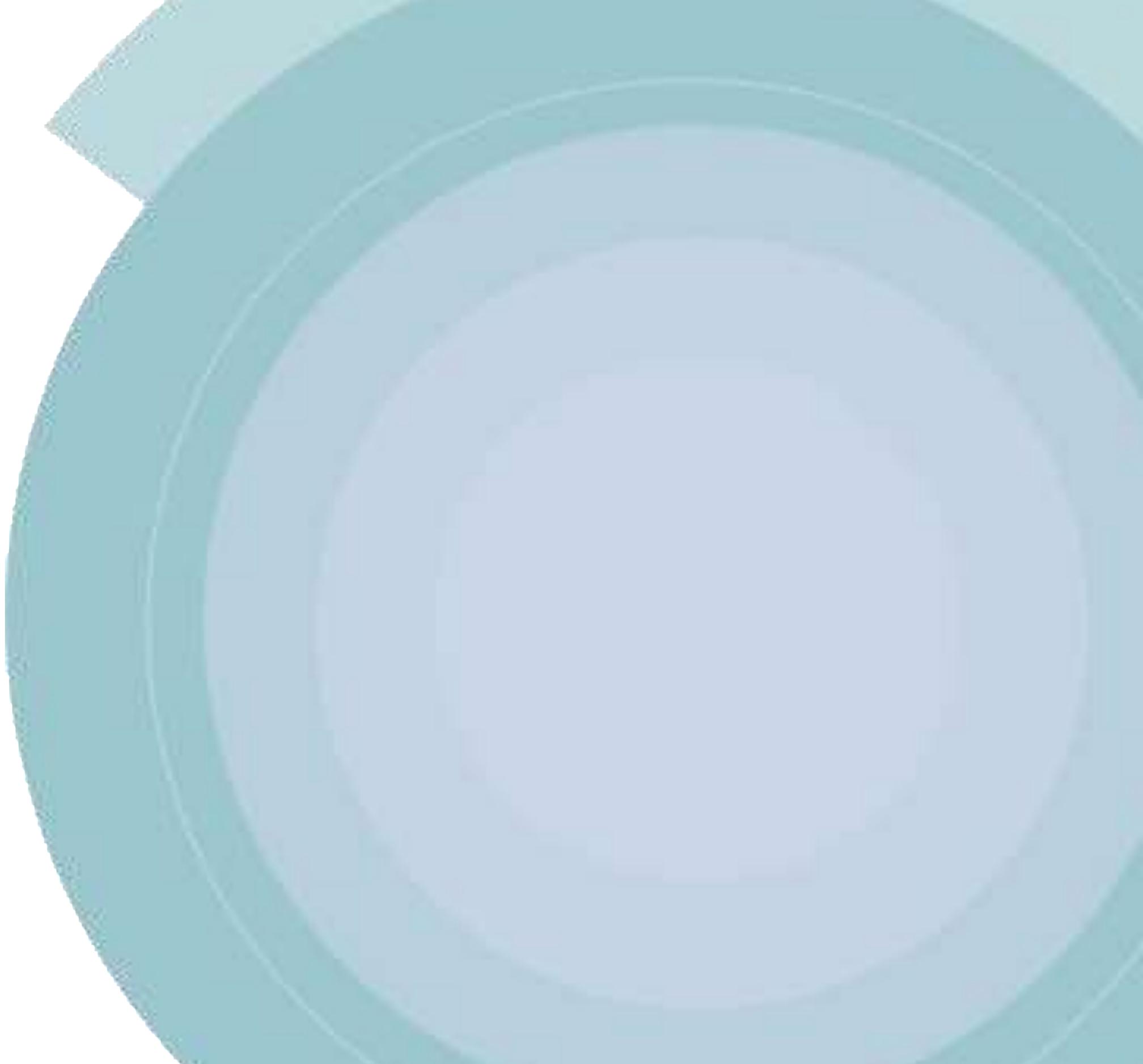
M&E Transition Completion – 1/30/2026

PRODUCTION TAKEOVER: Operating the production environment since Nov 1, 2025.

BUSINESS CONTINUITY: Successfully executed multiple COLA runs (Nov 25, 2025–Jan 26, 2026).

TRANSITION CLOSEOUT: Formal letter requesting to close transition was signed by the CalSAWS Executive Director on January 30, 2025.

BenefitsCal Accenture Team

Senior Advisory Team

Client Account Lead

Consortium
- BenefitsCal Director
- CalSAWS Leadership
- Project Steering Committee

Lisa Salas
Project Manager

Quality Assurance

Project Management

Other CalSAWS Contractor Project Managers

Customer Outreach and Marketing Team

Application Management

Agile & Product Management

Functional Team
- UCD
- Translation Services
- Training Development

Development Team

Security Team

Operations Team
- Cloud
- Testing
- Tier 3 Support

Innovation Team

2 11841646.24.0065

BenefitsCal Transition Timeline

	FEB	MAR	APR	MAY	JUN	JUL	AUG
				Release 26.07	Design/Build RJS	Test/Deployment RJS	
Group 1							
02-Project Management	KT			Cutover			
05-Support Services SCERFRA/SIRFRA	KT	JS	RJS				
Readiness Review		Cutover Group 1					
Group 2							
07-Prod Ops		KT		JS		RJS	
08-Tech Recovery		KT	JS				Cutover
09-Security	KT						
		JS		RJS			
Readiness Review						Cutover Group 2	
Group 3							
01-Transition-In	TIMP and TIWS						
Planning & Reporting	Readiness						
Training & KT Service & Function Migration	KT, JS and RJS across all 7 tasks						
Test and Validation					Validation		
03-SCR	KT			Design / Build RJS	Build / Test RJS	Test / Deplmt RJS 26.07	Cutover
		JS					
04-Marketing	KT						
			JS				
06-Enhancements & Innovations	KT						
		JS		RJS			
Readiness Review						Cutover Group 3	
In-Flight Projects TBD							

Legend: Knowledge Transfer | Job Shadow | Reverse Job Shadow | Validation
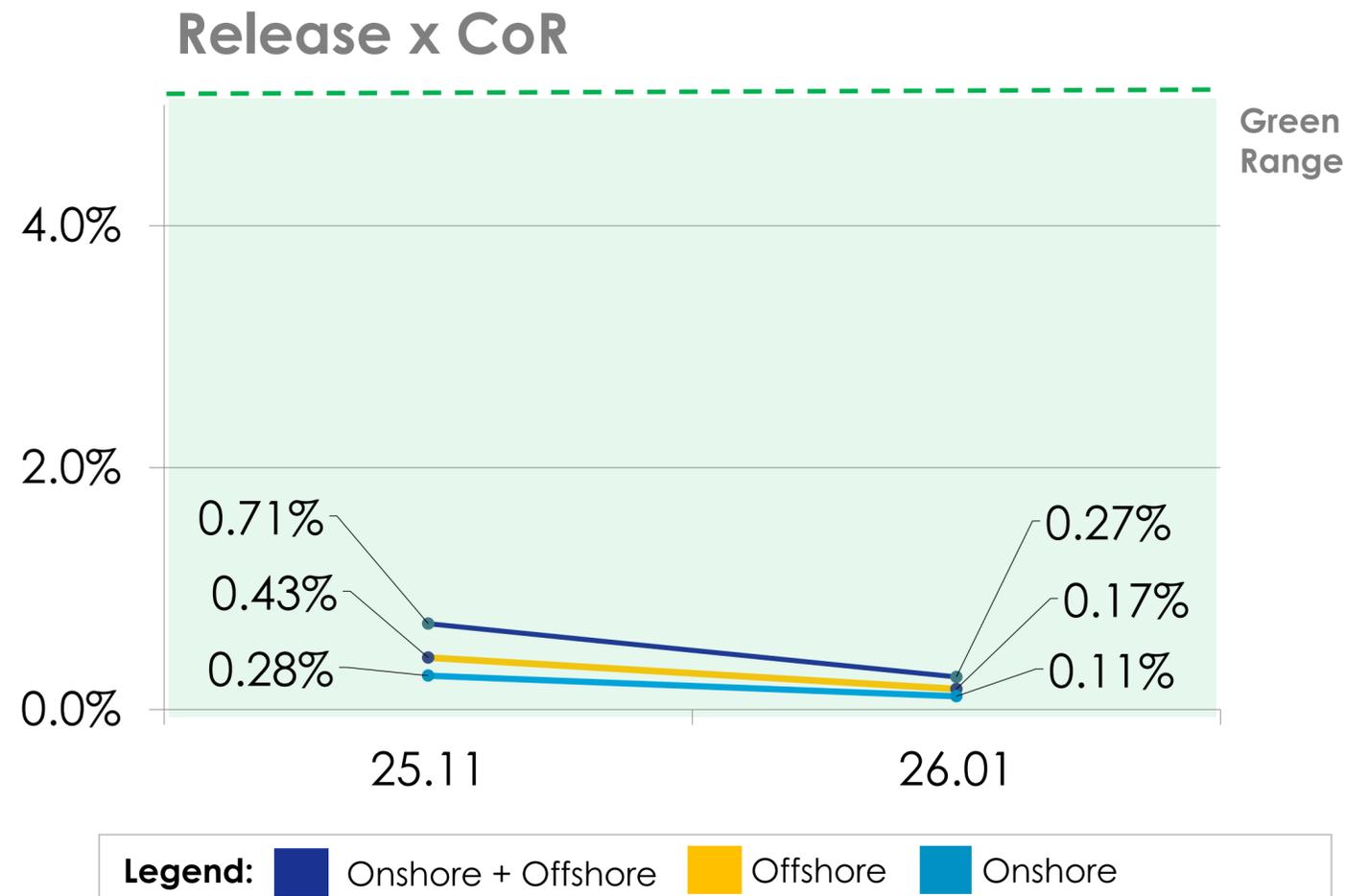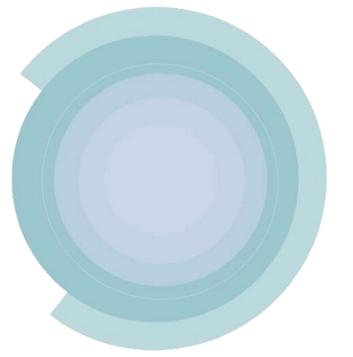
53

Success Factors

- Collaboration and Open Communication

- Prepare with early access to documentations, code, tools, etc.

- Early integration to existing meetings and insights to inflight work

- Escalate early and resolve together

- Leverage lessons learned from M&E and Infra transitions

- One Team!

Quarterly Performance Trends

CalSAWS Quarterly Statistics

CalSAWS Application Release Quality Metrics

Release x CoR

Green Range

0.71%
0.43%
0.28%

0.27%
0.17%
0.11%

25.11   26.01

Legend: ■ Onshore + Offshore   ■ Offshore   ■ Onshore

TYPICAL RANGES
GREEN (0-10%): 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 (10-15%)/**RED (>15%)**: The amount of time being spent on rework is higher than expected. This may impact the delivery schedule.

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

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

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

New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 26.01 COR numbers will be available after 26.03 goes live
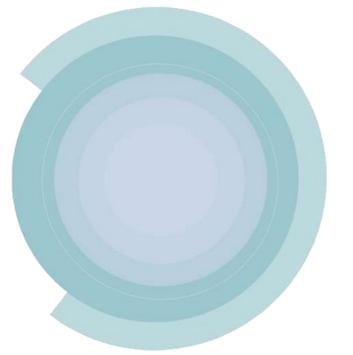
CalSAWS Quarterly Metrics

Production Defects Backlog

Defect Backlog chart
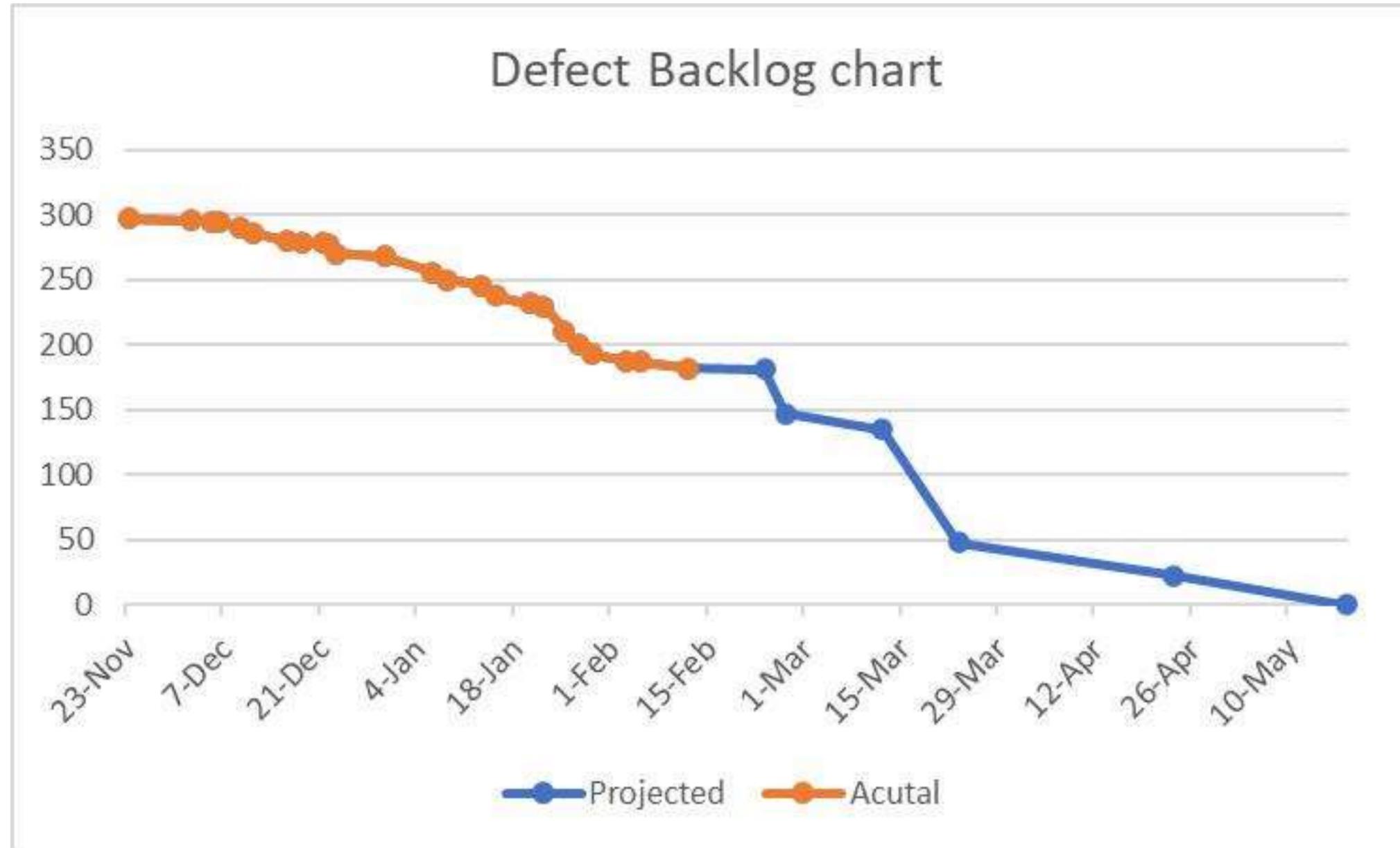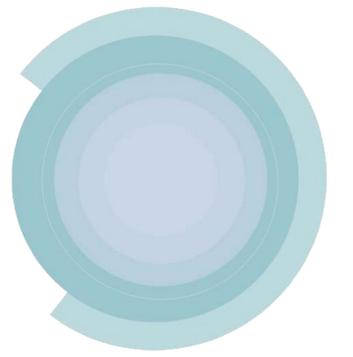
CalSAWS Quarterly Metrics

Production M&E SLA Metrics

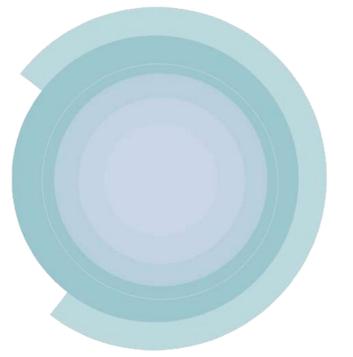| Perf Req #	LD Applies	Performance Requirement Title	Nov*	Dec*	Jan*	Feb**
1		Daily Prime Business Hours Availability	✓	✓	✓	✓
2		Monthly Prime Business Hours Availability; Non-Production Environment	✓	✓	✓	✓
3		Monthly Off Prime Business Hours Availability	✓	✓	✓	✓
4		Monthly Deficiency Notification Response Time	✓	✓	✓	✓
5		Monthly Service Desk Diagnosis, Tier 3	✓	✓	✓	✓
6		Daily Prime Business Hours ED/BC Response Time	✓	✓	✓	✓
7		Daily Off Prime Business Hours ED/BC Response Time	✓	✓	✓	✓
8		Daily Prime Business Hours Screen to Screen Navigation Response Time	✓	✓	✓	✓
9		Daily Off Prime Business Hours Screen to Screen Navigation Response Time	✓	✓	✓	✓
10		Daily Unbounded Search Response Time	✓	✓	✓	✓
11		Daily Prime Business Hours Standard Report Response Time	✓	✓	✓	✓
12		Daily Batch Production Jobs Completion	✓	✓	✓	✓
13		Disaster Recovery Response Time	✓	✓	✓	✓
14		Failure to Complete Access Control Audits	✓	✓	✓	✓
15		Security Information and Event Management System Uptime	✓	✓	✓	✓
16		Completion of Root Cause Analyses	✓	✓	✓	✓
17		Privileged Access Audit	✓	✓	✓	✓
18		Application Security Scans	✓	✓	✓	✓
19		Security Incident Notification	✓	✓	✓	✓
20		Security Incident Reporting	✓	✓	✓	✓
21		Security Incident Negligence	✓	✓	✓	✓

For the days missed, Prime EDBC was in the range of 96.2-97.9%. Rearchitecting to improve performance is underway and planned for late February 2026.
**February metrics are only through February 11, 2026.*

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

CalSAWS Quarterly Metrics
Production Infrastructure Performance Metrics

Perf Req #	Performance Requirement Title	Nov	Dec	Jan*
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

Performance Metrics are still being formally reviewed

Legend: ✅ SLA Met ❌ SLA Not Met

CalSAWS | Project Steering Committee

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

Hyland Quarterly Metrics
Hyland Imaging Performance Metrics
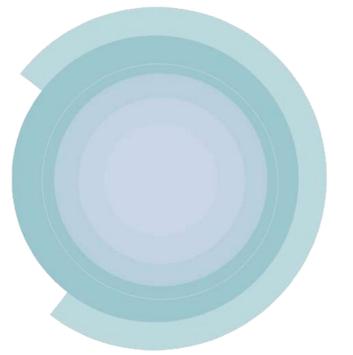
Performance Requirement Title	Performance Average Nov 2025-Jan 2026	Monthly Target	SLA Met
Uptime	100.00%	99.90%	✅
Page Views	99.32%	90%	✅
Database Transactions	99.98%*	90%	❌
Brainware Processing	99.50%	97%	✅
Technical Resources Response Time	0	>30 minutes	✅

Legend: ✅ SLA Met ❌ SLA Not Met

*Calculation is based on two months of data. January data is not available.

State Partners Updates

State Partners Updates

Adjourn Meeting