

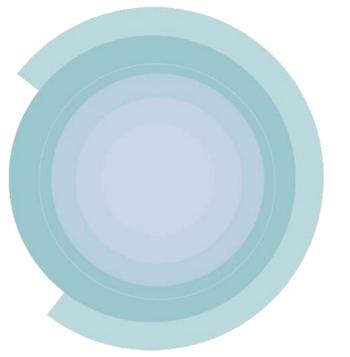
# Project Steering Committee Meeting

March 19, 2026



CalSAWS

# Agenda

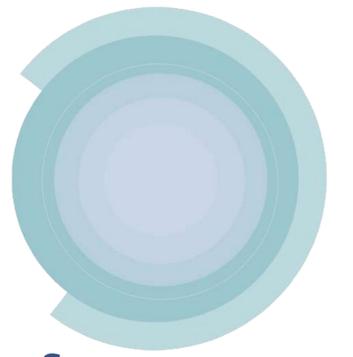


1. Call Meeting to Order.
2. Confirmation of Quorum and Agenda Review.
3. Public Comment: Public opportunity to speak on any item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

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

# Action Items

# Action Items

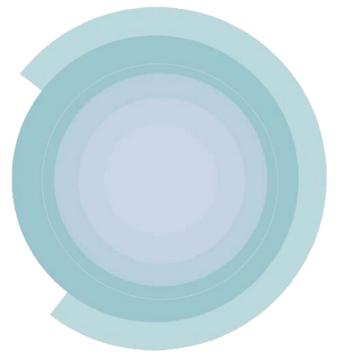


4. Approval of the Minutes and review of the Action Items from the February 19, 2026 PSC Meeting.

# Informational Items

# Data & Analytics Update

# A Comprehensive Approach to Analytics



Analytics that Counties Need...

Delivered in ways they can use.

OPERATIONAL INSIGHTS ♦ PRE-BUILT CORE REPORTS ♦ AD HOC CAPABILITY

distinct from task lists - they answer, 'how much was completed?' and 'who are we serving?'

## Case Characteristics

Population & Trends

## Continuing Eligibility

Active Case Management

## Application

Intake Processing

## Productivity

Work Completed

Highlight what requires attention, with detailed case information to support the work.

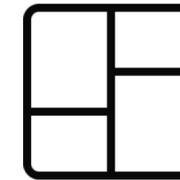
*Phase 1 Focus*



✓ Direct Delivery via Email

✓ Interactive Dashboards with KPIs & Trends

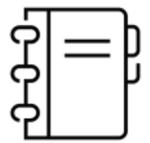
**Target Audience:**  
County Directors,  
Operational Managers



✓ Critical CalSAWS Reports

✓ Pre-Structured for Specific Output Requirements

**Target Audience:**  
Business & Strategy Users,  
Eligibility Users, Analytics  
Power Users



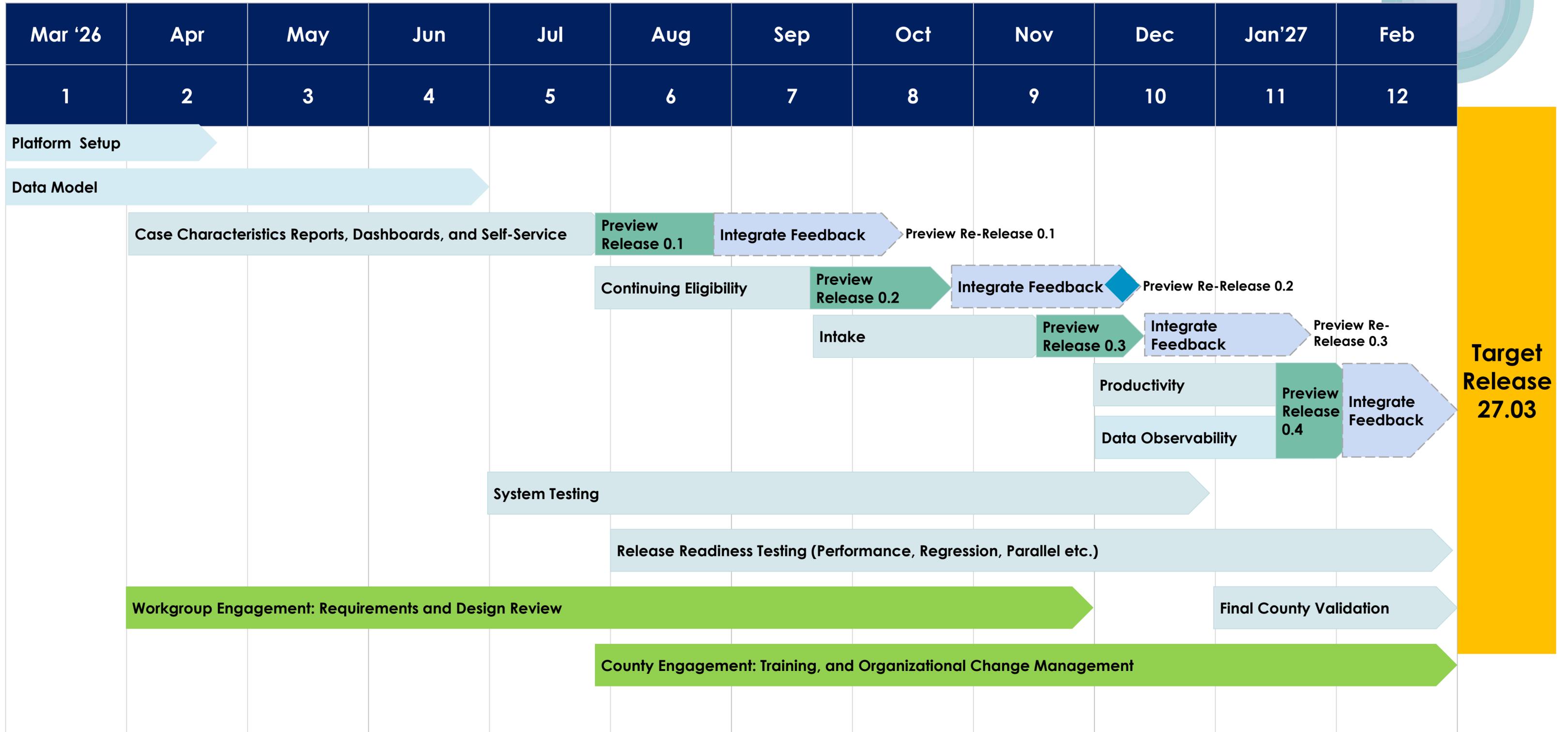
✓ Comprehensive Data Products

✓ Natural Language Interaction for All Users

✓ Dedicated County Workspace

**Target Audience:**  
Analytics Power Users

# Phase 1 Execution Timeline

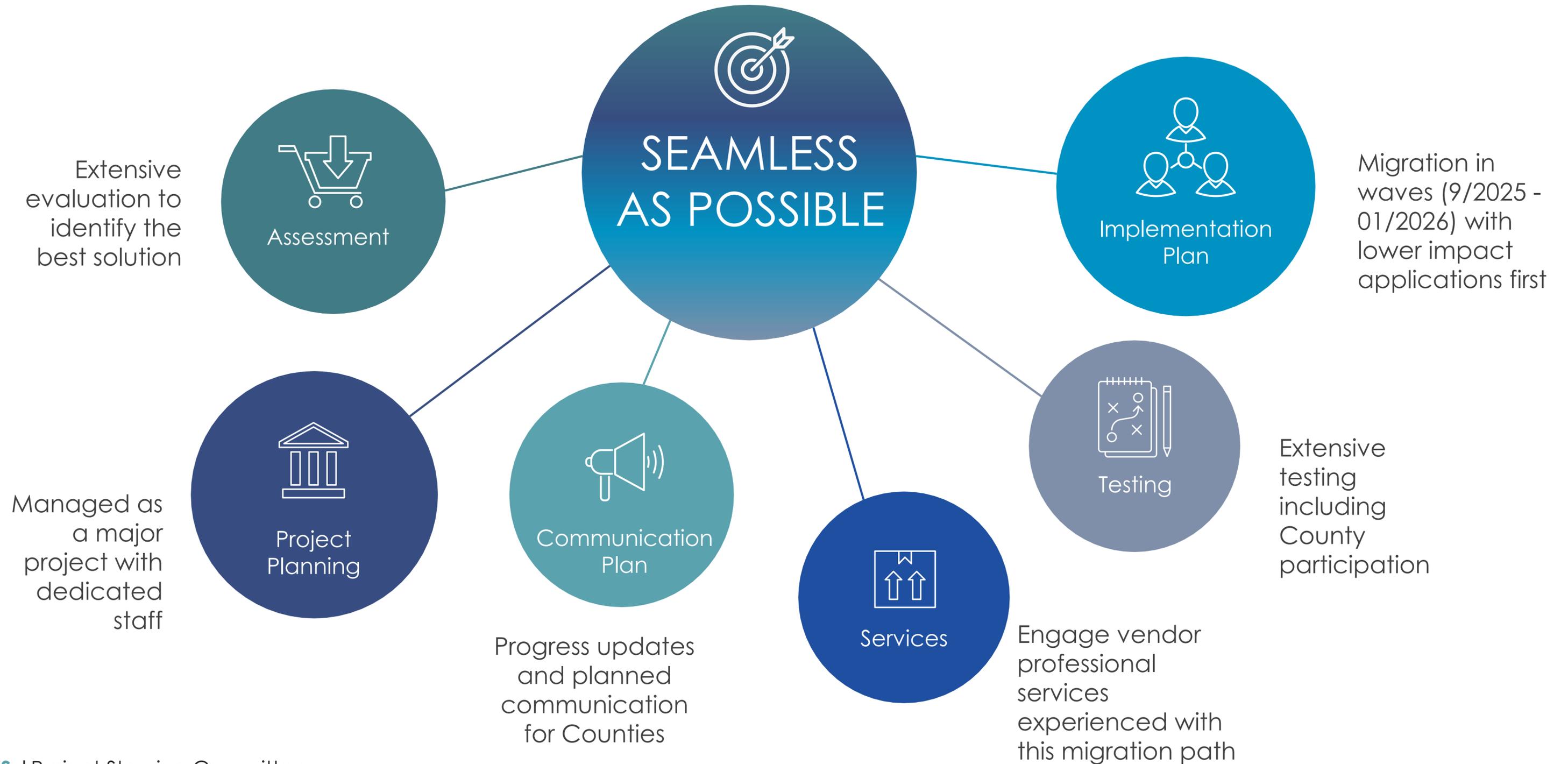


# Identity Access Management (IAM) Update

# IAM Replacement

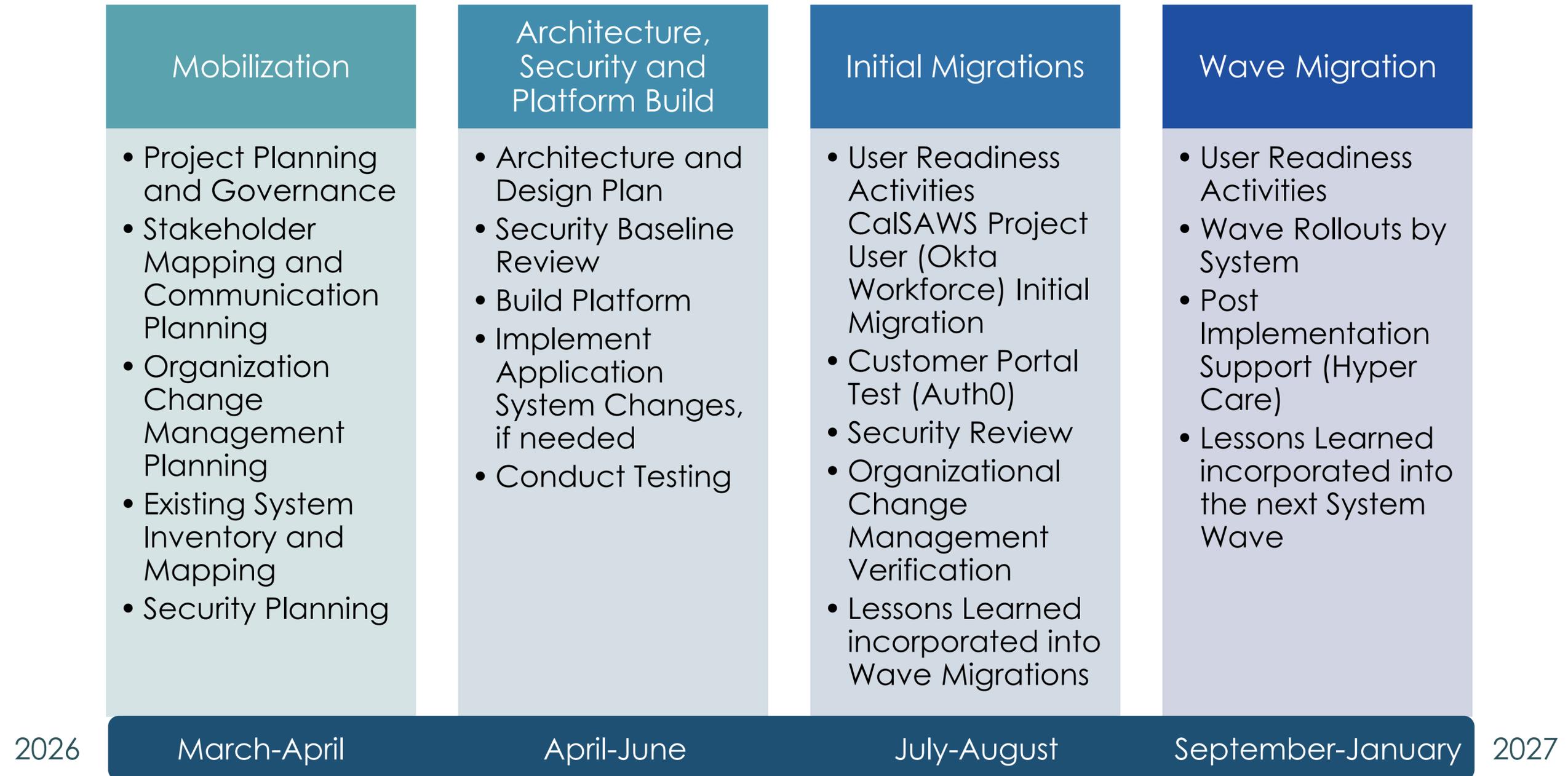
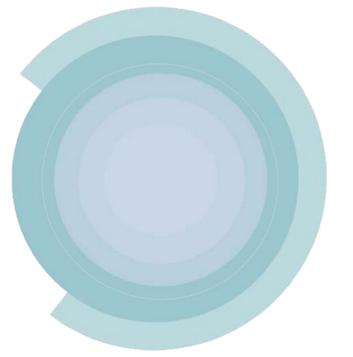
## Objective

Major change regardless of solution



# IAM Replacement

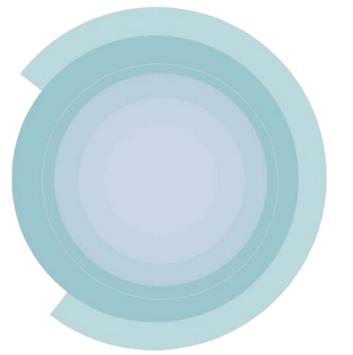
## Timeline



# Overview of Oracle Infrastructure Update

# Oracle Databases@AWS

What Is It and Why Change?

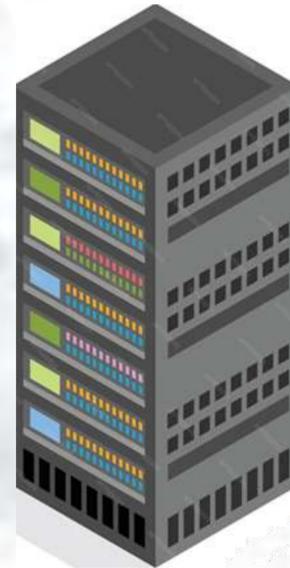


**REPLACE**



Oracle Databases deployed on AWS EC2 Servers

AWS



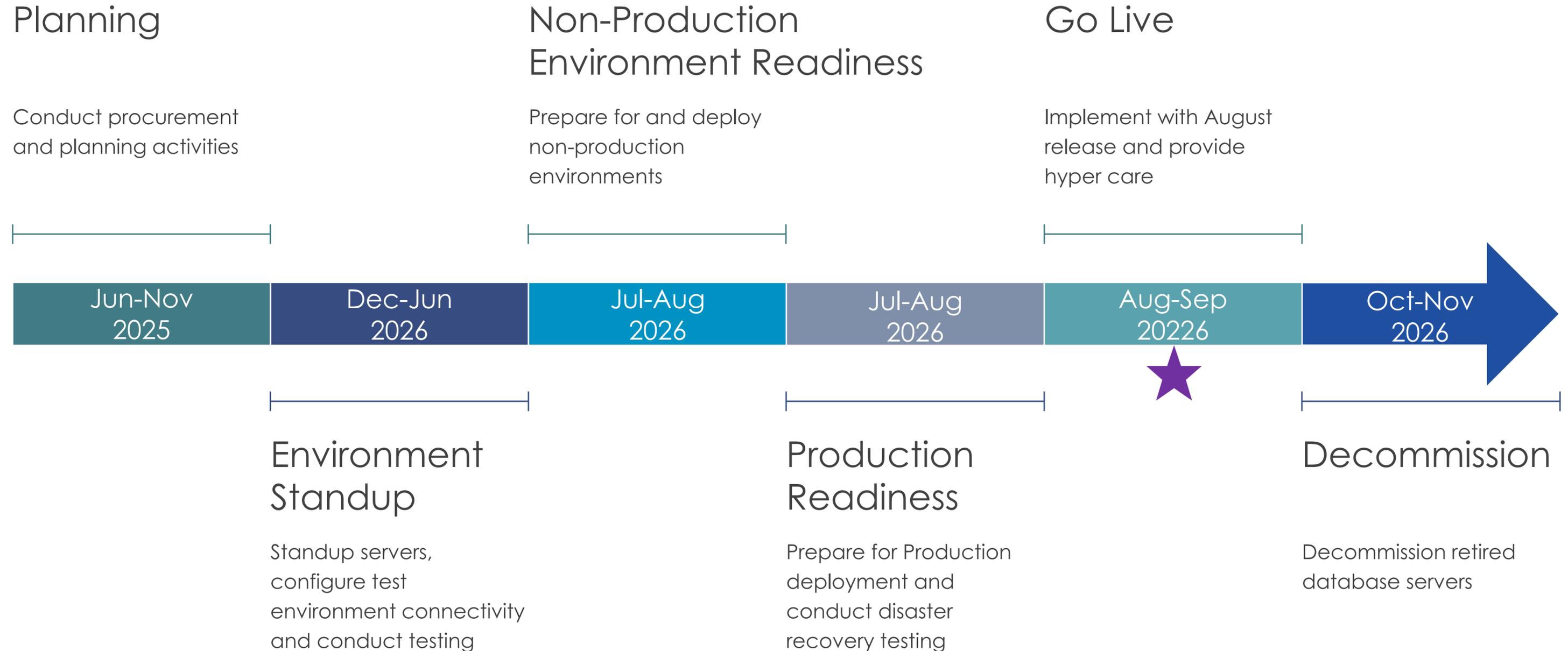
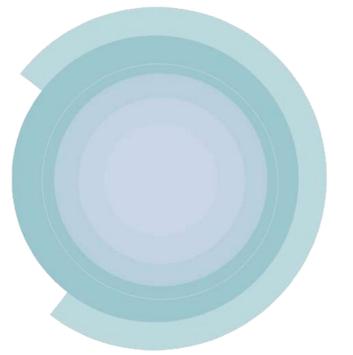
Oracle Databases deployed on Oracle Exadata Servers at AWS

## Why Change?

- ✓ **Improve Performance** – Auto adjusts workloads and scaling to improve online and batch
- ✓ **Improve Reliability** - Ability to operate when individual components fail through Real Application Clusters (RAC) and elimination of separate software
- ✓ **Increase Capacity** – Ability to scale up easily and avoid a size limitation in AWS
- ✓ **Increase Capability** – Allows usage of advanced Oracle features such as optimized compute

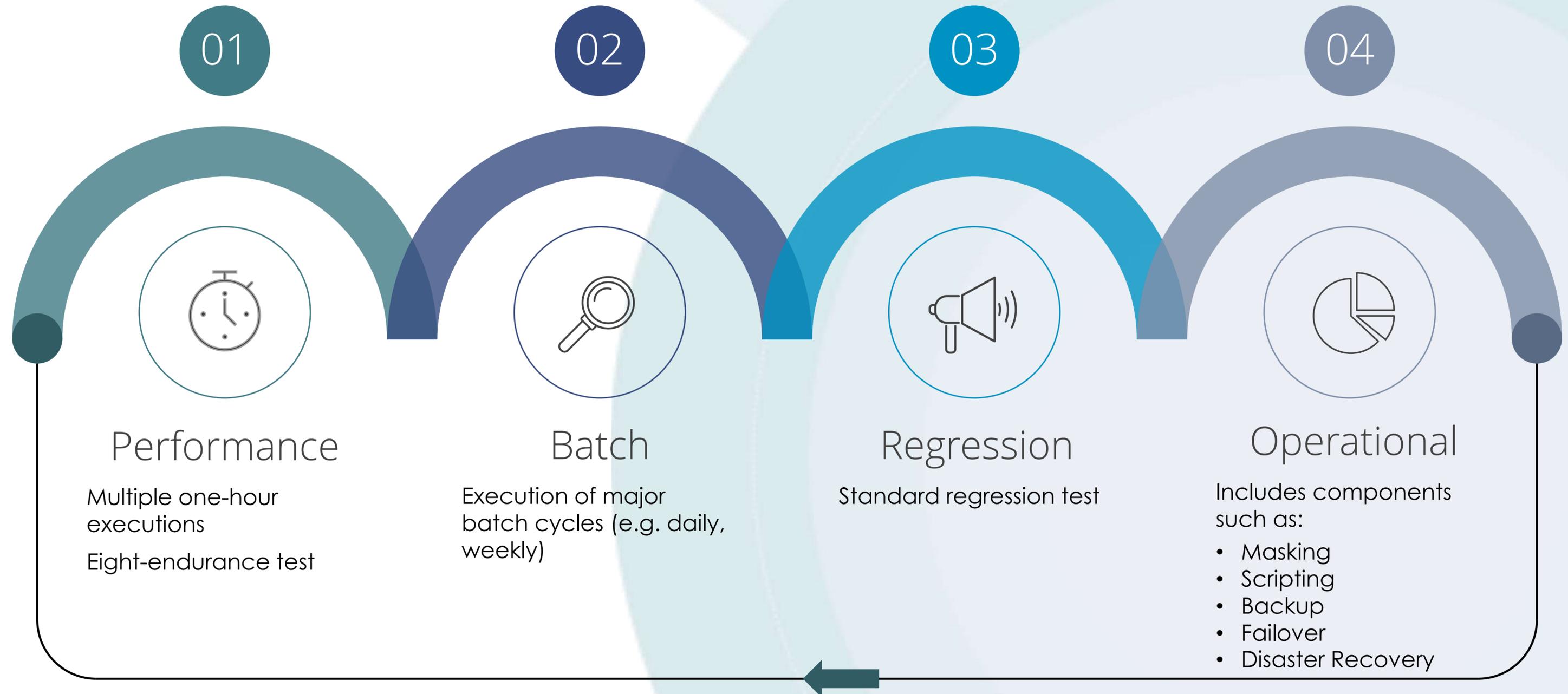
# Oracle Databases@AWS

When? - Database Server Migration Only



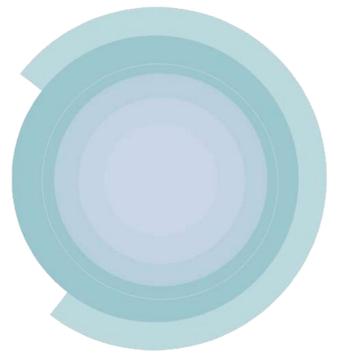
# Oracle Databases@AWS

## Performance and Functional Testing



# Oracle Databases@AWS

## Performance and Functional Testing Rounds



First Baseline Database Metrics  
(Completed, February)

Second Baseline with Initial Tuning  
(Mid March)

Third Performance Baseline  
(End of April)

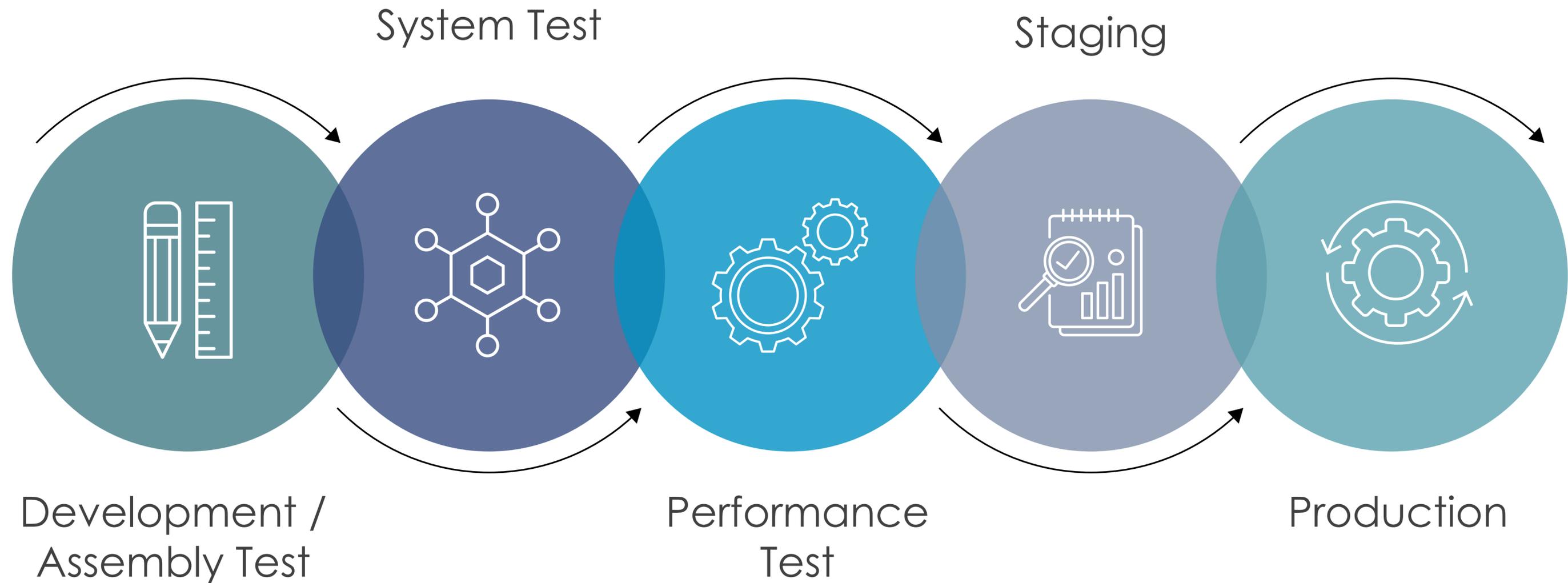
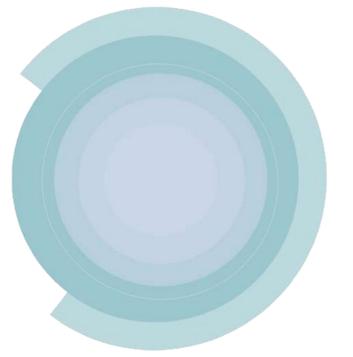


Perform Performance Tuning  
(In Progress, February – March)

AWS Network Changes Implementation  
(March)

# Oracle Databases@AWS

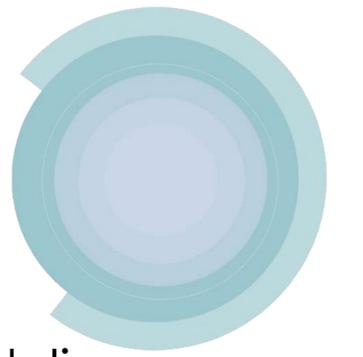
## Additional Functional Validation During the Release Testing



Each step of the release accesses the new Oracle database server.

# 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.

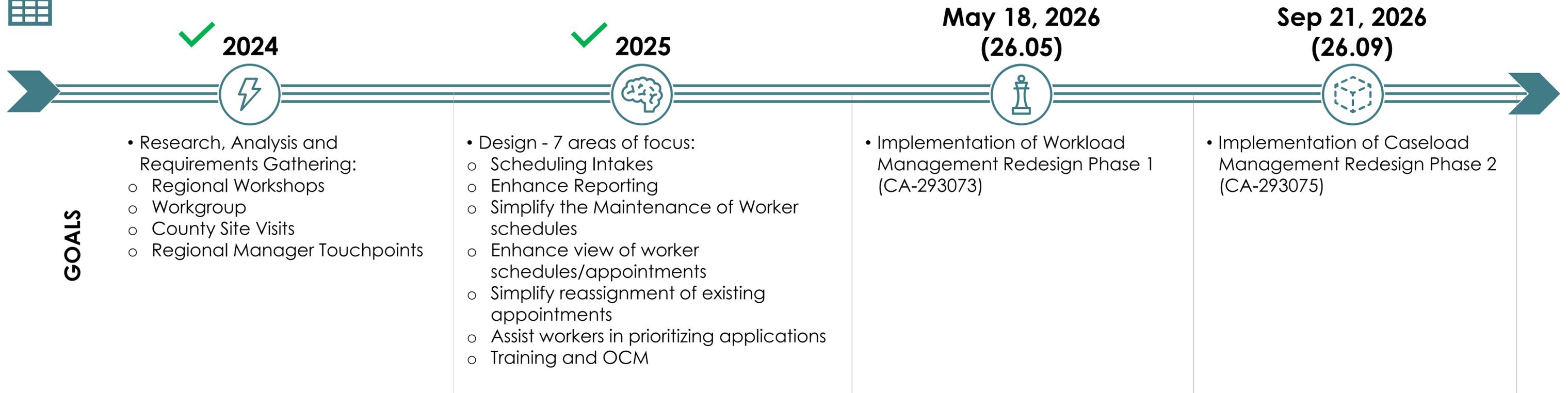


**Representation:** 44 counties; 6 regions; and CalSAWS leadership

- 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



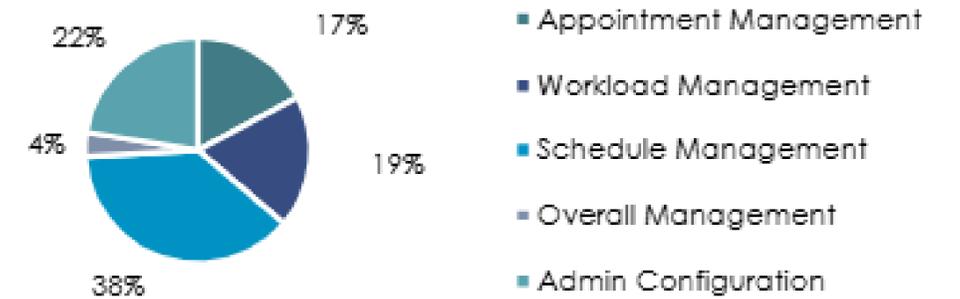
## Timeline and Goals:



# Workload Management | Impacts Dashboard

The Workload Management system will undergo updates aimed at enhancing features & capabilities for a user-centric design. These updates will add and improve functionality for how users manage schedules, manage workload, and maintain appointments with customers.

Change Impacts by Functional Area

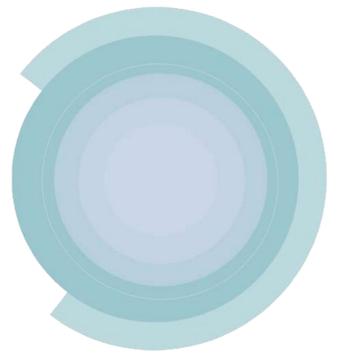


## OVERVIEW OF IMPACTED FUNCTIONAL AREAS

FUNCTIONAL AREA	CHANGE SUMMARY	CURRENT STATE	FUTURE STATE
<b>APPOINTMENT MANAGEMENT</b>	Streamlined scheduling, improved history tracking, and broader reassignment support.	Limited system support for assisted scheduling and reassignment; more reliance on manual steps/visibility gaps.	More guided scheduling assistance and dedicated reassignment capabilities to speed up appointment handling.
<b>WORKLOAD MANAGEMENT</b>	Adds capacity-based assignment/reassignment, improved automated recurrence, and better visibility.	Workload reassignment and pending work allocation are more manual and/or harder to find and manage quickly.	Expanded tools for workload assignment assistance, reassignment search/detail, and pending workload assignment tracking.
<b>SCHEDULE MANAGEMENT</b>	Improves schedule views/filters, adds availability-based controls, and updates access rights.	Schedule building, visibility, and maintenance are constrained (limited views and more fragmented actions).	A broadened scheduling experience with new pages for availability, templates, and schedule upload, plus improvements to existing schedule/search capabilities.
<b>OVERALL MANAGEMENT</b>	Adds a new My Work page for schedules, appointments, assignments, tasks, and (optional) messages.	Users spend more time navigating across areas to find what matters for their day.	A centralized My Work and refreshed Homepage experience to orient users quickly and streamline daily execution.
<b>ADMIN MANAGEMENT</b>	Adds new/updated configuration pages (capacity, appointment defaults/rules) with new security rights.	Caseload configuration is limited and worker level capacity configuration does not exist today.	New admin capabilities for caseload capacity configuration (including worker-level capacity), enabling more consistent setup and governance.

# H.R. 1 Workgroups Update

# HR-1 ABAWD Enhancement Workgroup



**Objective:** Gather and prioritize CalSAWS system enhancements and requirements related to ABAWD that will assist counties with implementing the HR-1 ABAWD policy changes.



**Timeline:** 12/17/2025 to 2/18/2026

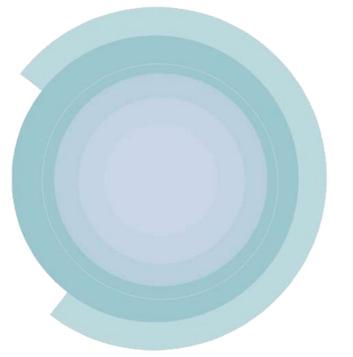


**Requirements:** 6 requirements prioritized:

Requirements

#	Description	SCR #	Target Release
1	When determining the work registration exemption reason “ <b>Cares for Dependent Child Under 6,</b> ” include a validation to confirm that the child under age 6 is <b>in the home</b> in order for the parent to be eligible for this exemption.	CA-298215	TBD
2	Indicate on the <b>CalFresh Work Registration Detail</b> page whether the determination was performed by a Worker or through EDBC.	CA-297868	TBD
3	Include a new Work Registration exemption reason on the <b>Work Registration Detail</b> page for a migrant or seasonal farmworker who meets the required work hours.	CA-297868	TBD
4	Include a field on the <b>School Attendance Detail</b> page to capture weekly hours when an individual is attending school less than half-time, with those hours counting toward ABAWD compliance	CA-297868	TBD
5	Include the ability to generate the <b>CF 888</b> form from the <b>Non-Scheduled Work Activity Detail</b> page to verify volunteer work hours used to satisfy the ABAWD work requirement.	CA-297868	TBD
6	Include the ability to generate the <b>CF 887</b> form from the <b>Medical Conditions</b> page to verify physical or mental unfitness to work when the condition is not apparent for CalFresh individuals.	CA-297868	TBD

# HR-1 Advocate CF Processing Workgroup



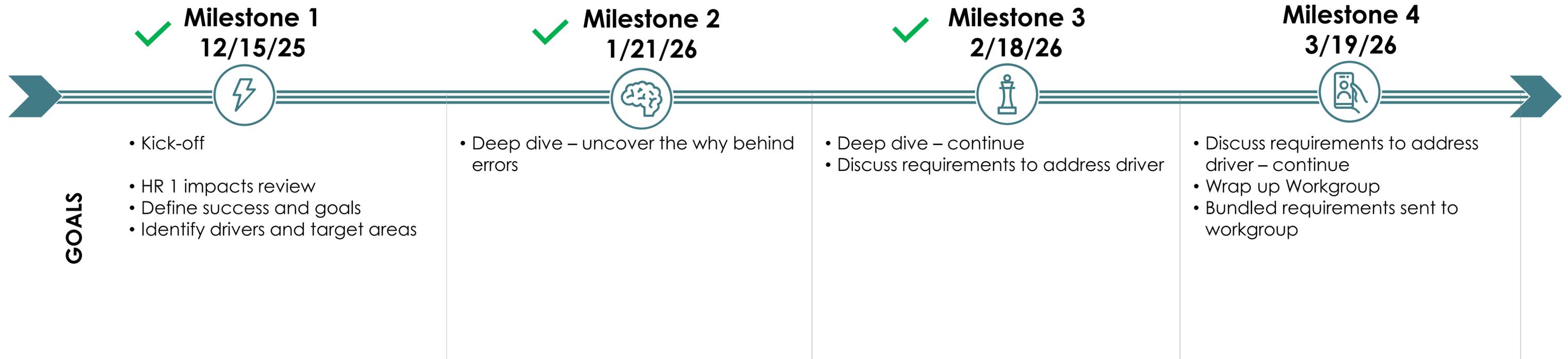
**Objective:** Gather actionable insight around the causes and impacts of the CalFresh Error Rates, which can be validated by customers.



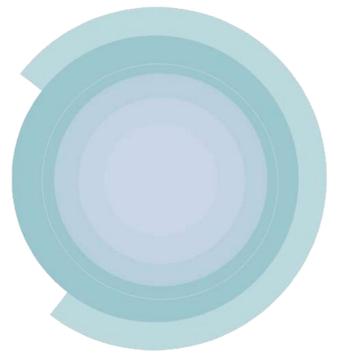
**Representation:** Advocate Stakeholders, CDSS, CWDA and CalSAWS leadership



## Timeline and Goals:



# HR-1 Advocate ABAWD Workgroup



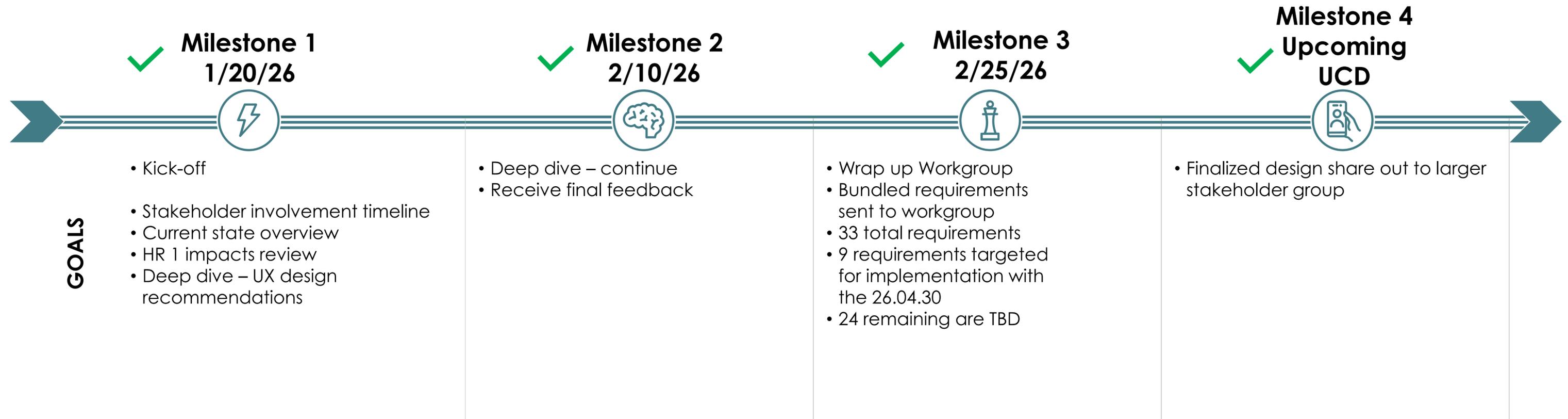
**Objective:** Leverage UI/UX design principles, enabling stakeholders to identify improved solutions that help customers more easily understand and meet ABAWD requirements.



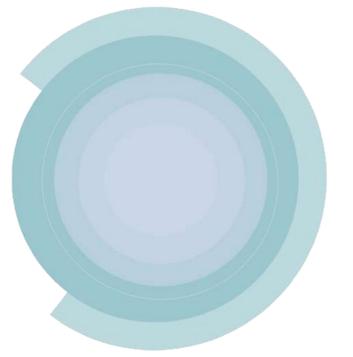
**Representation:** Advocate Stakeholders, CDSS, CWDA and CalSAWS leadership



## Timeline and Goals:



# HR-1 Advocate Truv Workgroup



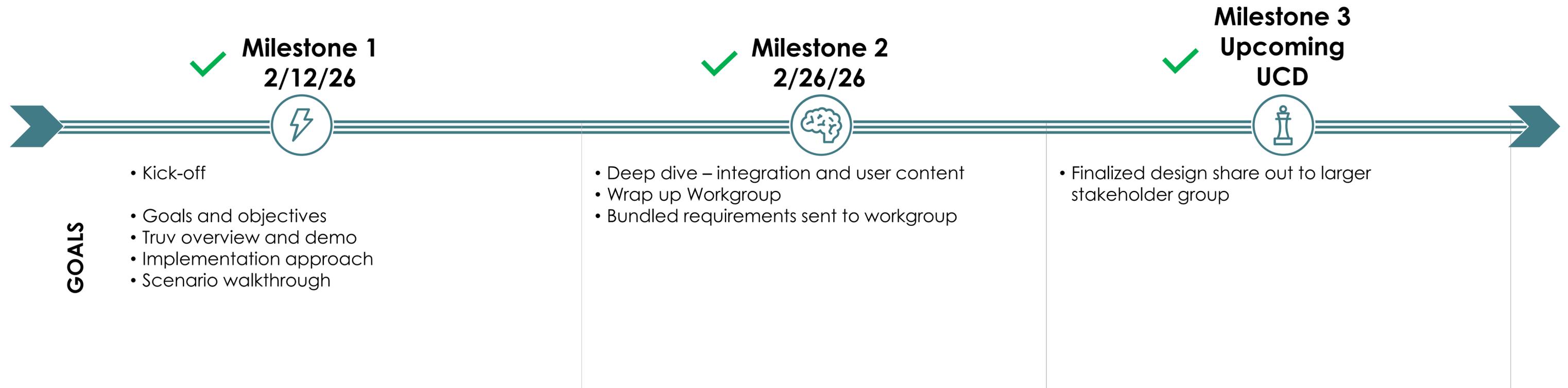
**Objective:** Provide a foundational understanding of TRUV, including its purpose and value, while identifying and discussing key policy considerations for integration and user content.



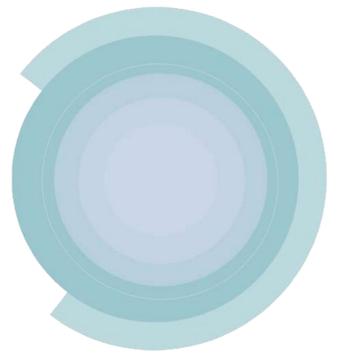
**Representation:** Advocate Stakeholders, CDSS, DHCS, CWDA and CalSAWS leadership



## Timeline and Goals:



# HR-1 Advocate Medi-Cal Workgroup



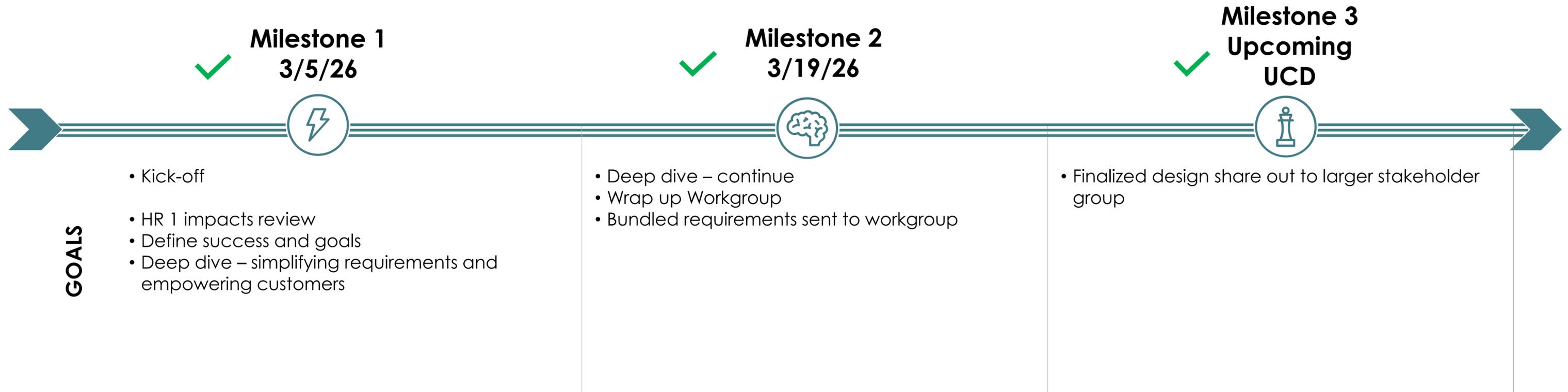
**Objective:** Leverage UI/UX design principles, enabling stakeholders to identify improved solutions that help customers more easily understand and meet Medi-Cal work and reporting requirements.



**Representation:** Advocate Stakeholders, DHCS, CDSS, CWDA and CalSAWS leadership

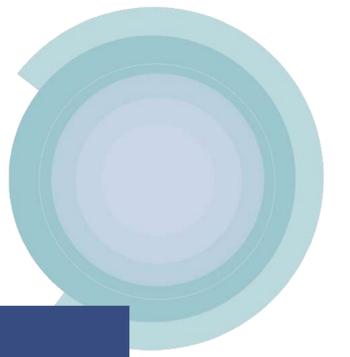


## Timeline and Goals:



# BenefitsCal HR 1 Priorities

## CalFresh and Medi-Cal Changes



### CalFresh



- CSPM-80744: ABAWD Time-limits and Exemptions (26.04.30)
- CSPM-81960: TRUV – Income and Employment Verification (26.07)

### Medi-Cal



- CSPM-80312: Asset Reinstatement - Non-MAGI (25.12.21)
- CSPM-80930: Retroactive Medi-Cal Update (26.06)
- CSPM-80928: Work Requirements - MAGI (26.09)
- CSPM-80929: Semi-Annual Redeterminations – MAGI (26.09)
- CSPM-81631: Cost-Sharing for Adults (2027)

Additional items may be added as the policy evolves or BenefitsCal impacts are identified on CalSAWS changes.

# Policy & Release Update

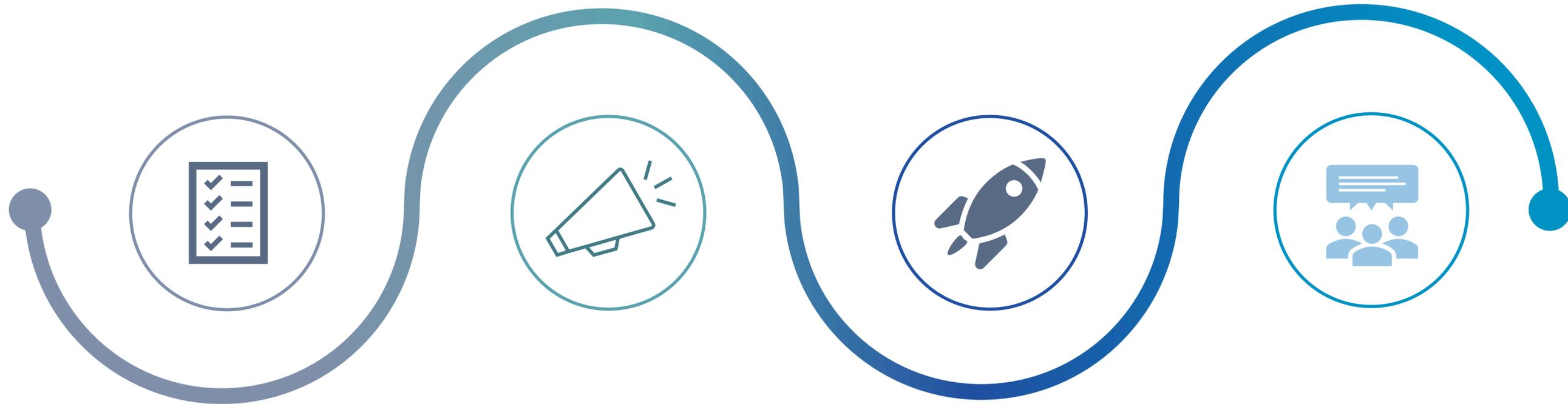
# Release and Policy Update

## Upcoming Releases

<b>March</b> <b>Baseline (3/23/2026)</b> <b>and Priority Releases</b>	<b>April</b> <b>Priority Releases</b>	<b>May</b> <b>Baseline (5/18/2026)</b> <b>and Priority Releases</b>	<b>June</b> <b>CalHEERS Baseline</b> <b>(6/15/2026) and</b> <b>Priority Releases</b>
<p><b>3/01/2026:</b></p> <ul style="list-style-type: none"><li>• 2026 Federal Poverty Levels for Medi-Cal COLA Batch EDBC (CA-290454)</li></ul> <p><b>3/23/2026:</b></p> <ul style="list-style-type: none"><li>• Add 9Y Aid Code for Child in Treatment Facility with Parent (CA-233675)</li><li>• Update CalFresh and CalWORKs Indigent Functionality (CA-275191)</li><li>• Create a new MEDS Alerts Performance Standards Dashboard (CA-291166)</li></ul> <p><b>3/31/2026:</b></p> <ul style="list-style-type: none"><li>• HR 1 ACL 25-50 Changes to CalFresh Eligibility for Most Lawfully Present Non-Citizens (CA-294574)</li></ul>	<p><b>4/30/2026:</b></p> <ul style="list-style-type: none"><li>• HR 1 Add CF 377.11E to the CF RE and CW/CF RE Packets (CA-296476)</li></ul>	<p><b>5/18/2026:</b></p> <ul style="list-style-type: none"><li>• ACL 25-50 H.R. 1 Changes to ABAWD Exemptions and Expiration of Statewide Waiver (CA-294575)</li><li>• H.R. 1 - ACL 25-74 CF 886 to Inform CalFresh Households About Their Work Registrant and ABAWD Status (CA-291366)</li><li>• ACWDL 22-26- Eligibility and Redetermination Requirements for Incarcerated Members (CA-273391)</li><li>• Workload Management Redesign Phase 1 (CA-293073)</li></ul>	<p><b>6/15/2026:</b></p> <ul style="list-style-type: none"><li>• Reduced Timeframes for Retroactive Medi-Cal (CA-292997)</li></ul> <p>CalHEERS eHIT SCRs:</p> <ul style="list-style-type: none"><li>• Adding Application Date to EDR for Added Members (CA-292176)</li><li>• Annual eHIT Enhancements (CA-292177)</li><li>• Updates to Federally Recognized Tribes (CA-292648)</li></ul>

# 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: 2/10/2026

Webcast: 3/3/2026

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

## DEPLOYMENT

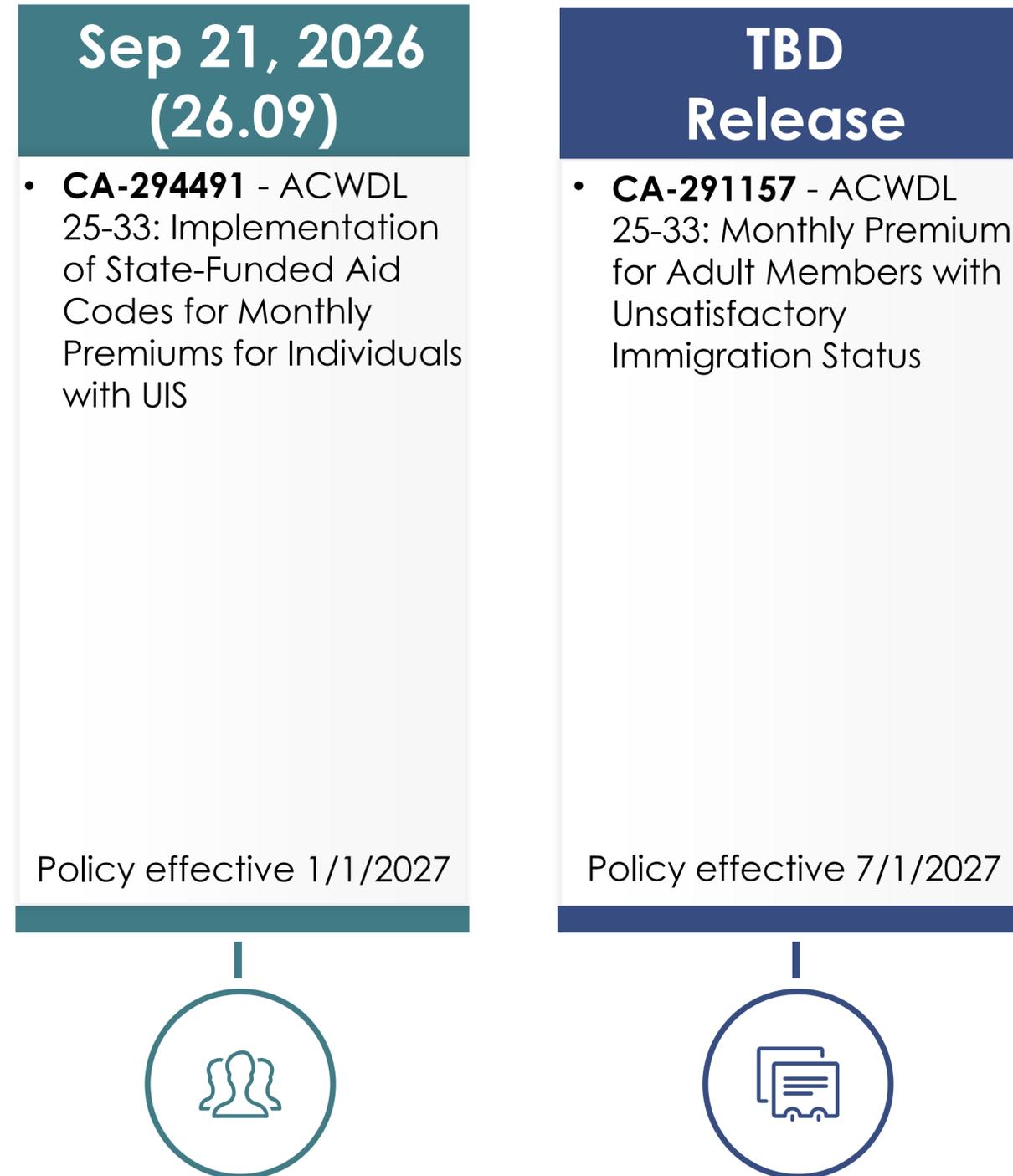
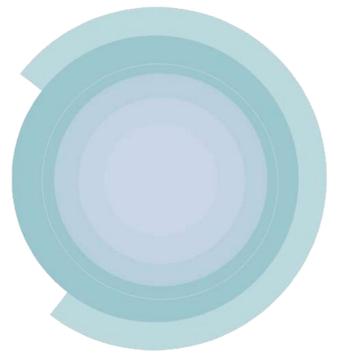
Greenlight: 3/18/2026

Deployment: 3/22/2026

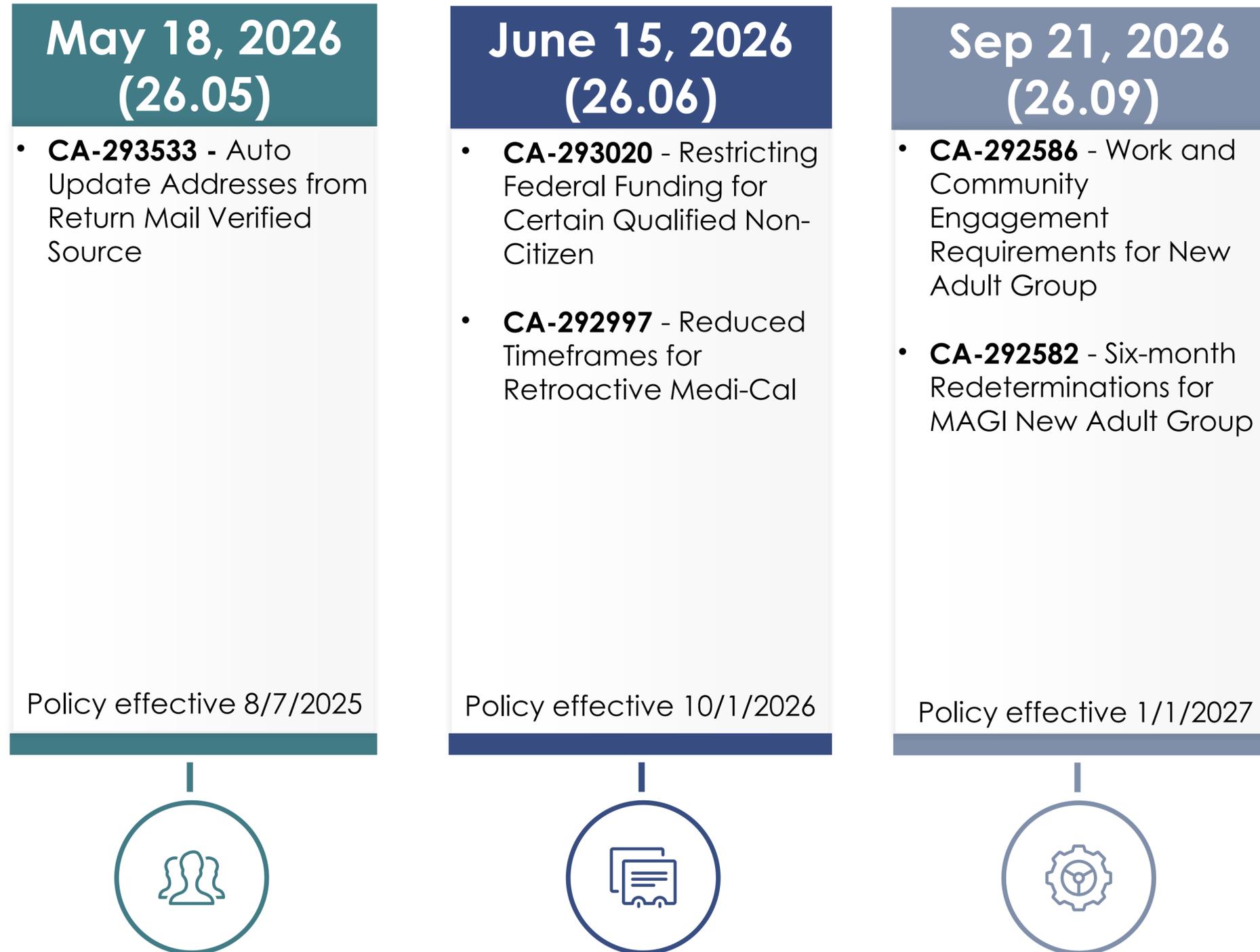
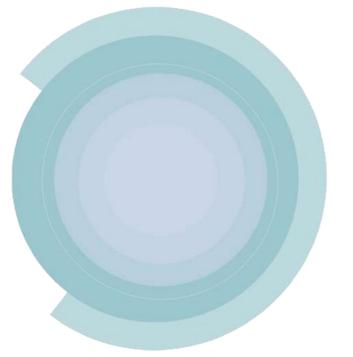
## POST RELEASE

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

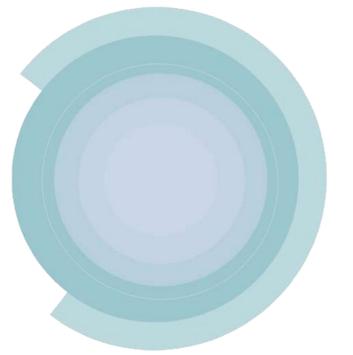
# Medi-Cal State Budget Policy Roadmap\*



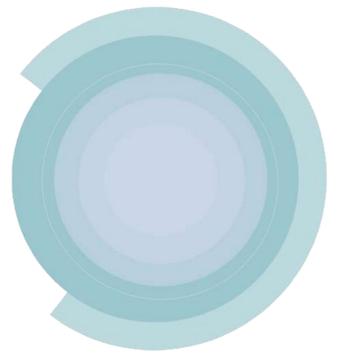
# Medi-Cal HR-1 Policy Roadmap\*



# Medi-Cal HR-1 Policy Roadmap\*



# CalFresh May Revise & HR-1 Policy Roadmap\*



**Mar 31, 2026  
(26.03.31)**

- **CA-294574** – HR-1 Changes to CalFresh Eligibility for Most Lawfully Present Non-Citizens

Policy effective 4/1/2026



**Apr 30, 2026  
(26.04.30)**

- **CA-296476** – HR-1 Add CF 377.11E to the CF RE, ESAP RE, and CW/CF RE Packets

Policy effective 6/1/2026



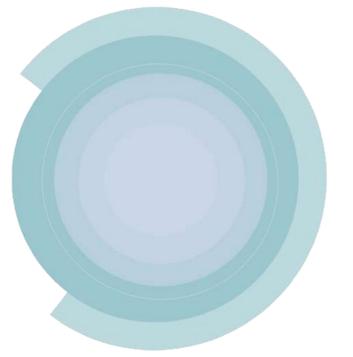
**May 18, 2026  
(26.05)**

- **CA-294575** – HR-1 Changes to ABAWD Exemptions and Expiration of Statewide Waiver.
- **CA-291366** – HR-1 Updates to the CF 886 form to Inform CalFresh Households about their work registration and ABAWD status

Policy effective 6/1/2026



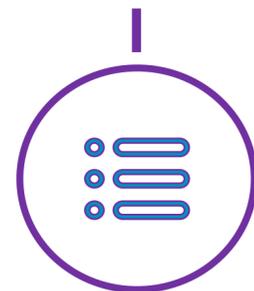
# CalFresh May Revise & HR-1 Policy Roadmap\*



## Jul 20, 2026 (26.07)

- **CA-294653** - ACL 25-68  
Add CF 1 Threshold Languages
- **CA-297470** - TRUV -  
Equifax Continuous  
Monitoring Tool  
Integration

Policy effective 7/4/2025



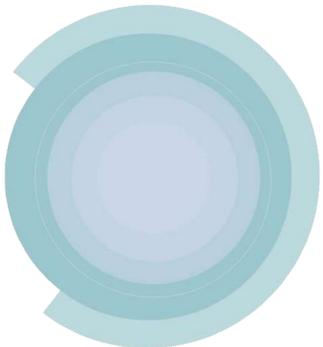
## Sep 21, 2026 (26.09)

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

Policy effective 10/1/2026



# CalFresh System Changes In Progress



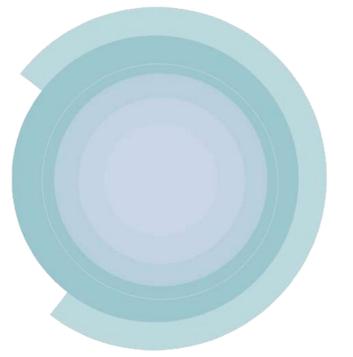
Intended to help address CalFresh Error Rates

## 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.	Update EDBC rules, online pages, and new automated action
CA-296569	CF Processing HR1 Workgroup – Nudge and Automated System Error Reviews (Phase 1)	Establishes the Nudge and Automated System Error Review framework



# CalFresh System Changes In Progress

Intended to help address CalFresh Error Rates

## July Release 26.07

SCR	Focus Area	Change
CA-296576	CF Processing HR1 Workgroup - Automate contribution amounts to minimize manual entry, while still requiring worker review and adjustment when necessary	SCR design in progress
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.	Update EDBC rules, online pages, and new automated action

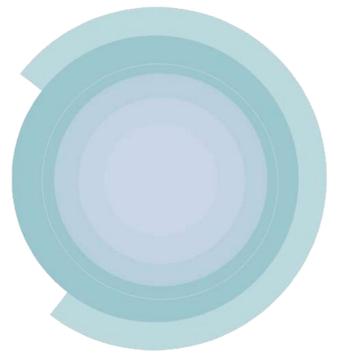
## September Release 26.09

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.	Design not started
CA-296575	CF Processing HR1 Workgroup - Configurable supervisor authorization enhancements by program and scenario	Design not started
CA-297005	CF Processing HR1 Workgroup - Automated System Error Reviews (Phase 2)	Design not started

## November Release 26.11

SCR	Focus Area	Change
CA-55143	Several Fiscal, Batch, and Eligibility enhancements to improve skipped benefits	SCR design in progress
CA-296572	CF Processing HR1 Workgroup - Automatic prompts during interviews to support information capture, clarification, verification, and journal documentation	Design not started
CA-296573	CF Processing HR1 Workgroup - Targeted nudges and navigation improvements to help workers verify and confirm information accuracy	Design 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
- Quick Guide

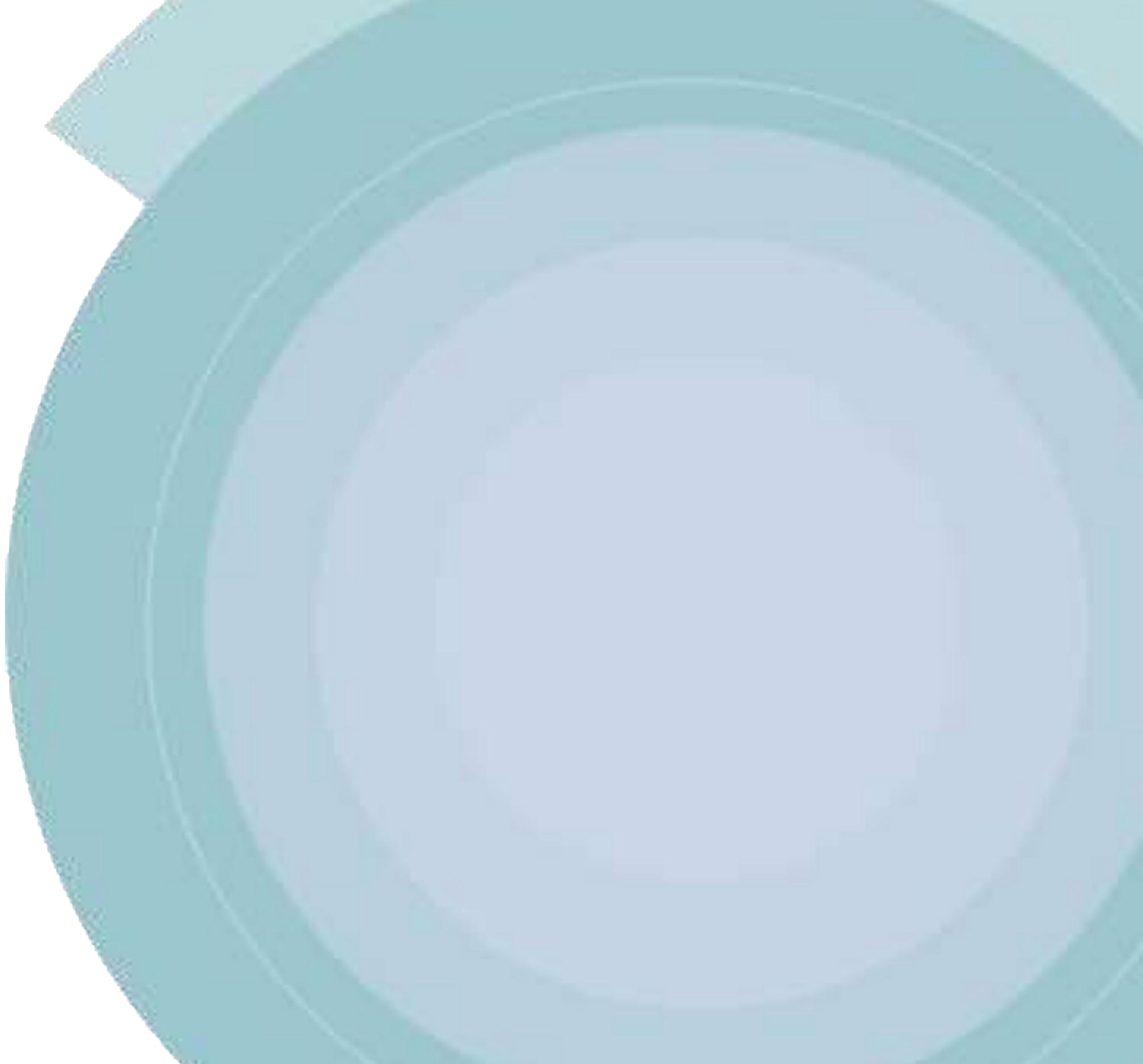
## **ABAWD Updates:**

SCR CA-294575 - Functionality demonstrations for changes to ABAWD Exemptions and Expiration of Statewide Waiver – May 12, 2026 | 2:30pm – 4:30 PM

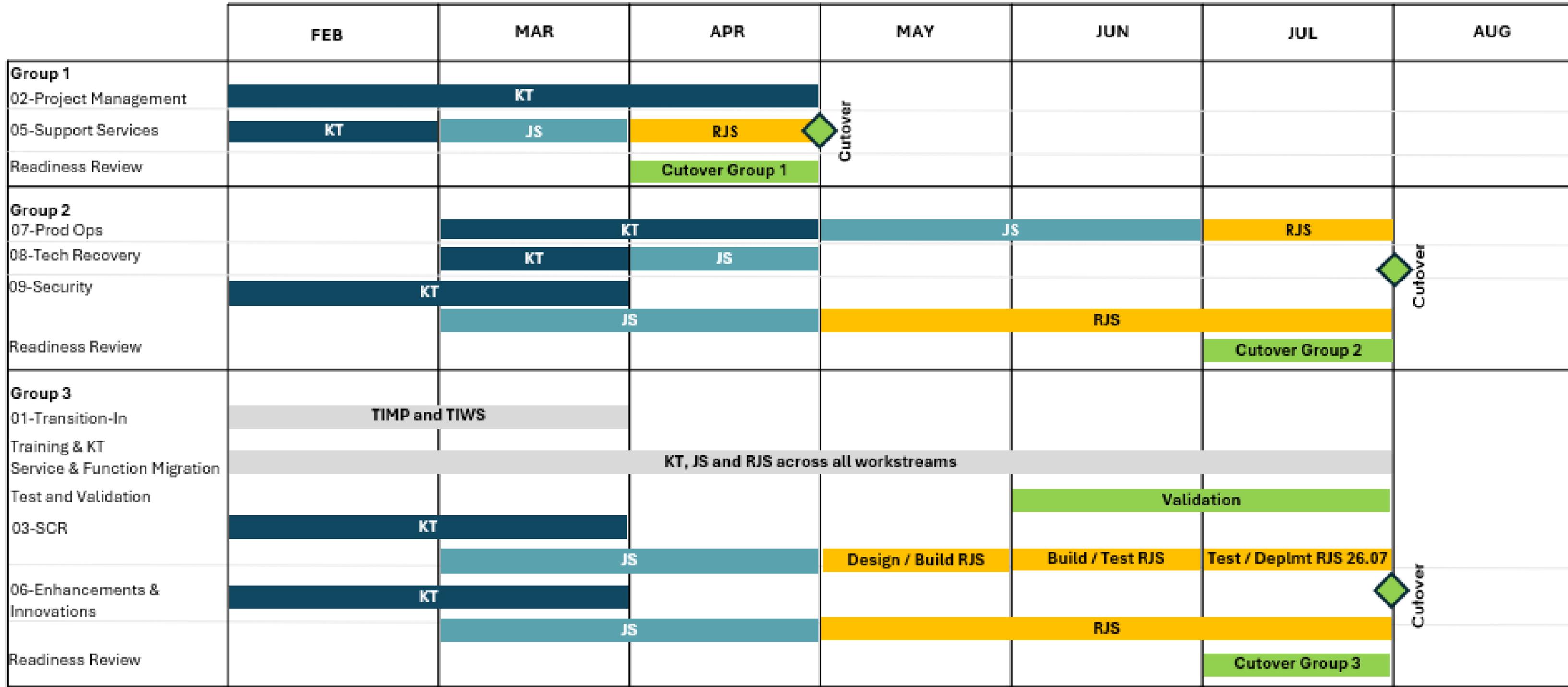
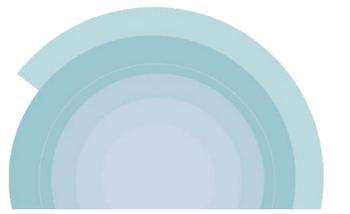
Resource Updates:

- Job aid,
- Quick Guides
- WBT updates

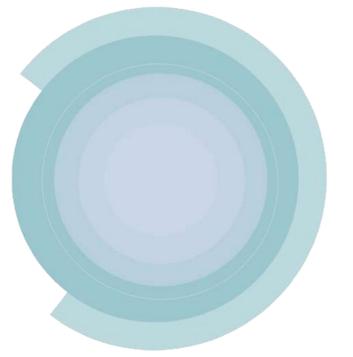
# BenefitsCal Transition Update



# BenefitsCdI Transition Timeline

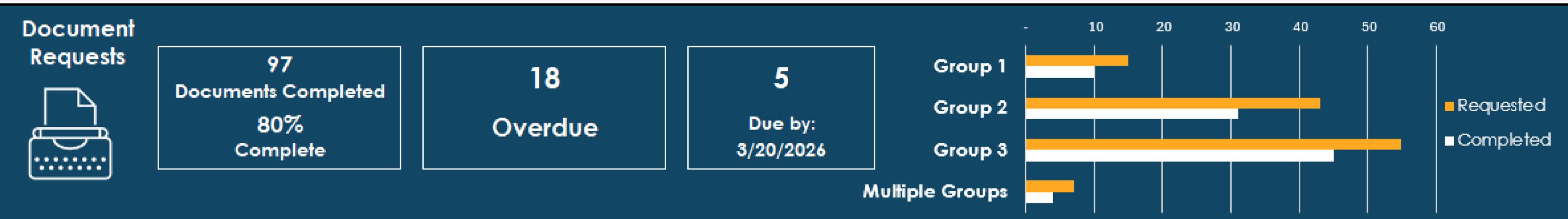
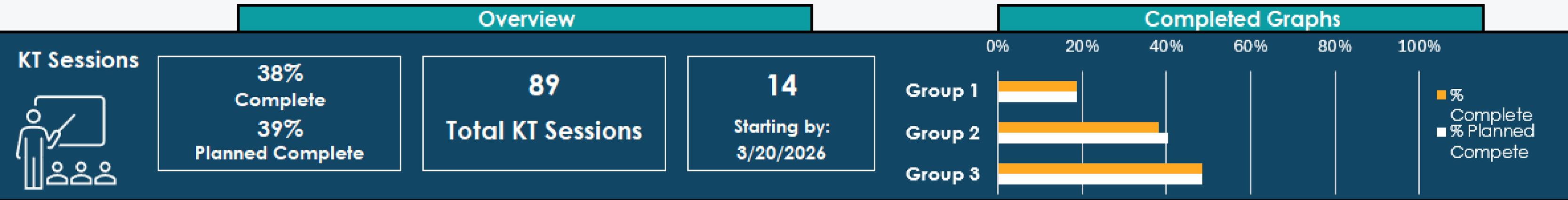


# BenefitsCal Transition Update



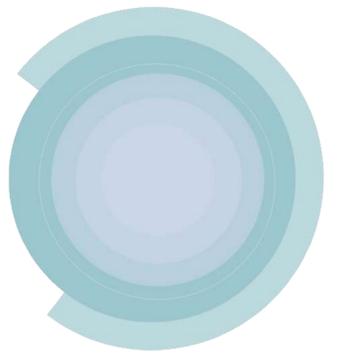
## CalSAWS BenefitsCal Transition-In Dashboard

Status Date: **3/13/2026**



# CalSAWS Learning Exchange (CLE) Update

# CalSAWS Learning Exchange Sessions

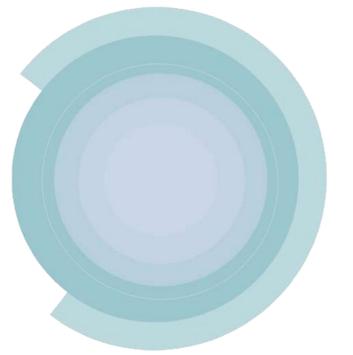


## Objective

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

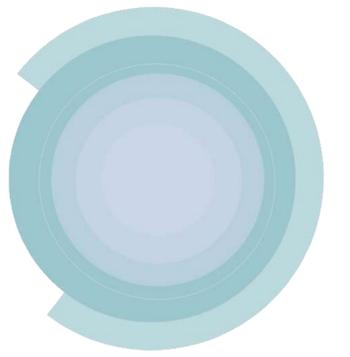
- **663 participants** attended
- **50 counties** represented
- Sessions at times also include State Partners (CDSS)

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

February Communication Portal CLE – Feedback



“Great presentation, looking forward to navigating through the new portal with everything centralized..”

5 Star average rating

“Excellent CLE! Very informative! Looking forward to this game changing platform for counties!”

“Appreciated the demo and excited for the layout of the new portal.”

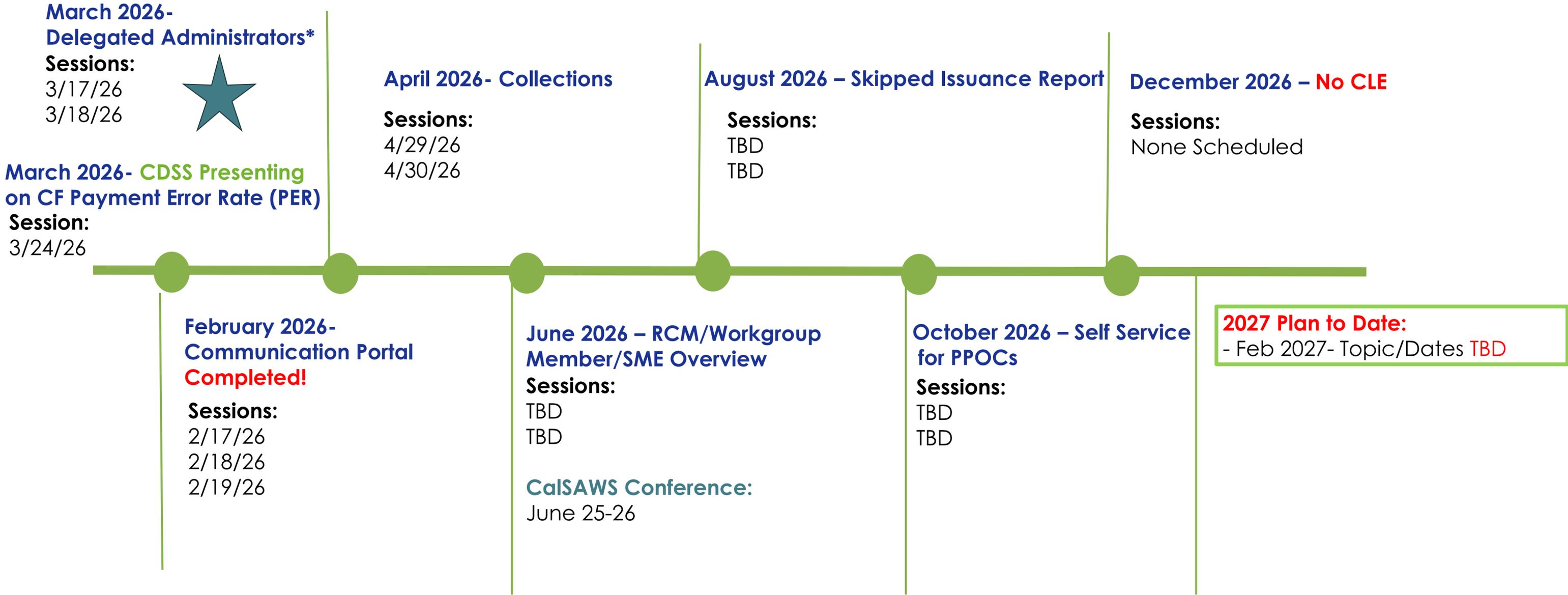
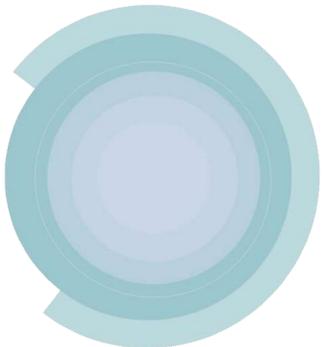
“Everything in place, at the click of our fingertips. Looking forward to the new home page.”



“Great presentation! Can’t wait to try it out. Looks like things will be much easier to locate. :)”

# CalSAWS Learning Exchange Sessions

## CLE Planning Schedule 2026



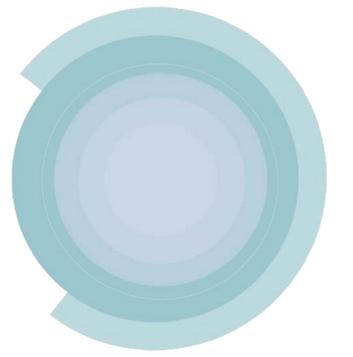
# Next Steps

- **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.



# 2026 CalSAWS Conference

# 2026 CalSAWS Conference & JPA Member Representatives Meeting



## Dates

- Arrive Wednesday, June 24, 2026, at Fairmont Hotel, San Francisco
- Conference begins 8:00 AM, Thursday, June 25, 2026
- JPA Member Representatives Meeting and Final Conference Sessions Friday, June 26, 2026



## Conference Includes

- Keynote
- 3 Plenary Sessions
- 8 Breakout Sessions
- Meals
  - Breakfast Thursday and Friday
  - Lunch Thursday

## Plenary Sessions

1. Creating the Soundtrack: CalSAWS Innovation Roadmap
2. Listening Smarter: How GenAI is Supporting Better Service Outcomes
3. 58 Arrangements, One Song: Transforming Lives

## Breakout Sessions

1. Learning the Arrangement: FCED and All That Jazz!
2. Rhythms of the Frontline: Contact Center Innovation
3. Managing the Lineup: Workload Assignment (R26.05)
4. ABAWD in Tune: Navigating Policy, Systems, and County Impact
5. Data in Harmony: How Analytics is Helping Us Hear the Whole Story
6. Remixing the Customer to County Experience: Truv in BenefitsCal
7. Bringing Policy, Systems, and County Practices into Harmony: Medi-Cal HR 1
8. Tightening the Tempo: Practical Strategies for Error Rate Reduction

### Conference Registration Link

[Where Innovation Finds Its Rhythm](#)

### Hotel Room Registration Link

[CalSAWS Room Block at The Fairmont San Francisco](#)

Registration Open  
March 2 – May 22, 2026



# State Partners Updates



# State Partners Updates

# Adjourn Meeting