

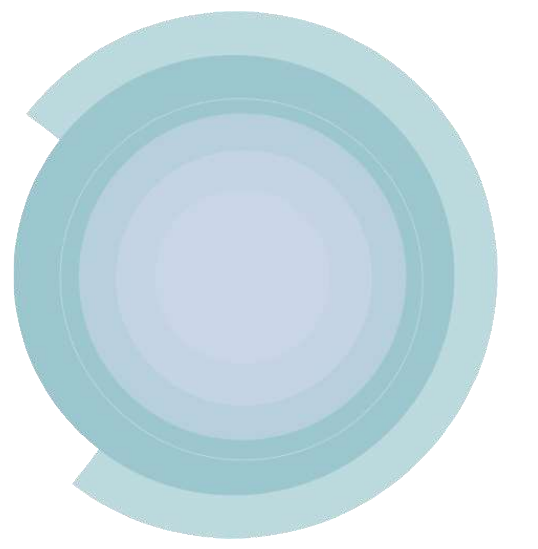
# JPA Board of Directors Meeting

April 10, 2026



CalSAWS

# Agenda

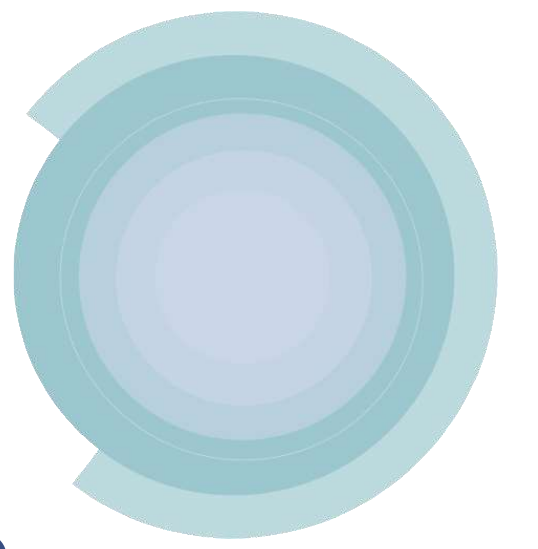


1. Call Meeting to Order.
2. Confirmation of Quorum and Agenda Review.
3. Public Comment: Public opportunity to speak on any item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

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 Consent Items:

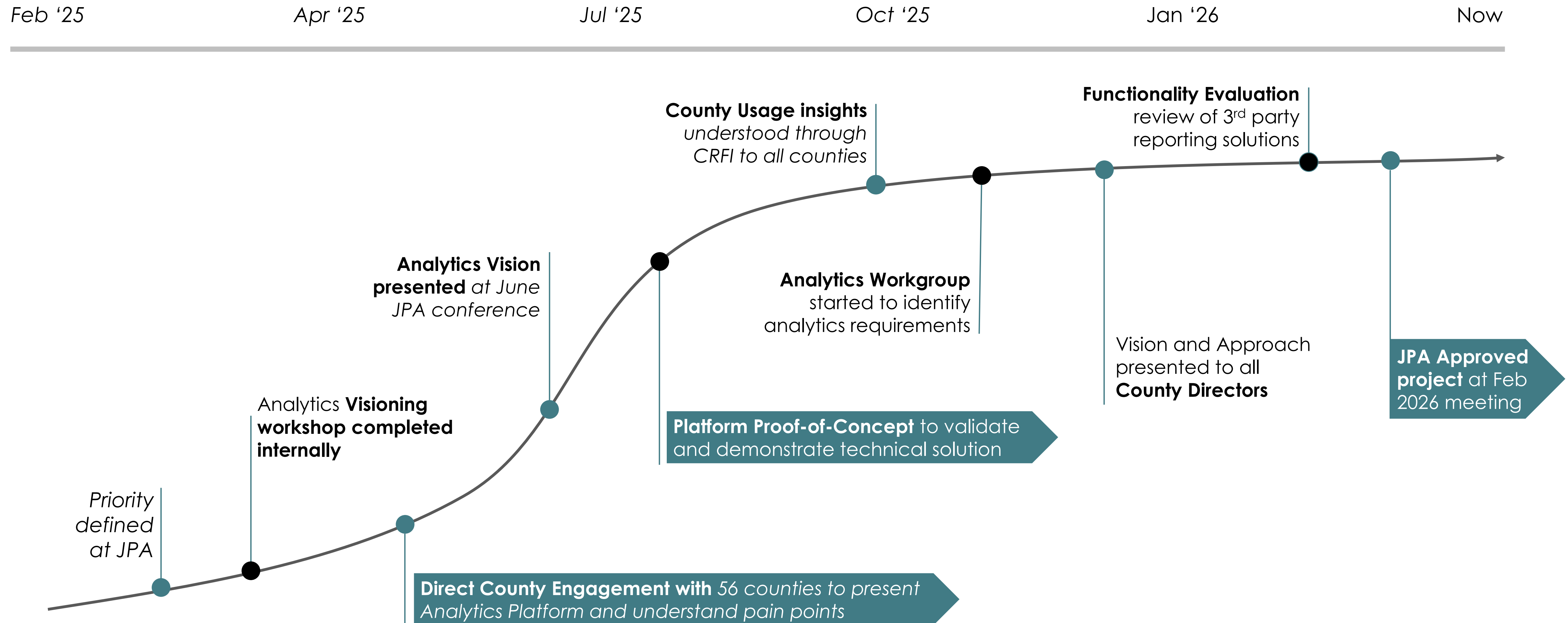
- a. Approval of the Minutes and review of the Action Items from the March 13, 2026, meeting of the JPA Board of Directors.
- b. Approval of Deloitte M&E Change Order 8, which includes eight (8) premise items and three (3) County Purchases.
- c. Approval of Deloitte Portal Mobile Work Order 22, which includes a security enhancement and two (2) premise items.
- d. Approval of Gainwell Infrastructure Change Order 9, which includes two (2) premise items and three (3) County Purchases.
- e. Approval of Memorandum of Understanding (MOU) between CalSAWS and Child Welfare Digital Services (CWDS) for the exchange of client data with California Automated Response and Engagement System (CARES).

# Informational Items

# Data & Analytics Update

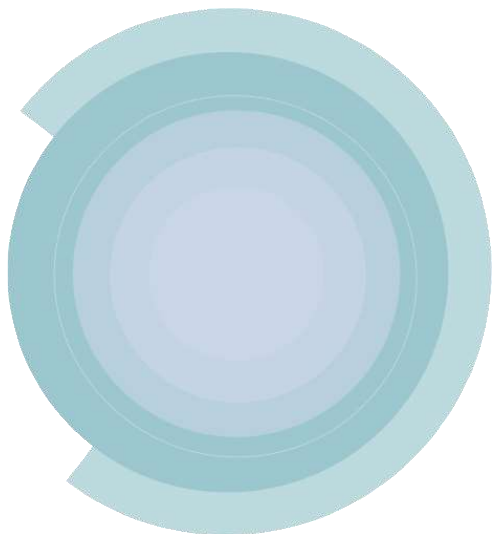
# Laying the Groundwork for the Analytics Platform

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



# Analytics Workgroup Representation

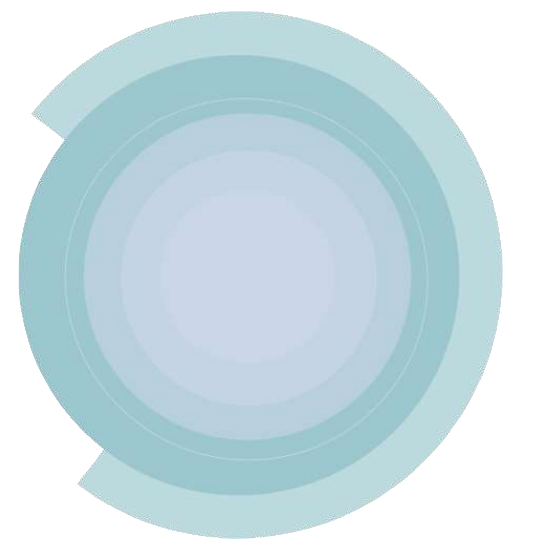
Diverse Personas Represented across Regions with Notable Gaps



	Region 1	Region 2	Region 3	Region 4	Region 5	Region 6
Executive Representative	TBD	TBD	TBD	TBD	TBD	TBD
Operations Representative	Napa Santa Cruz	Yuba	Shasta	Merced	Orange San Diego	Awaiting Rep
Line Staff Representative	Awaiting Rep	Awaiting Rep	Awaiting Rep	Awaiting Rep	Riverside	Awaiting Rep
Business Analysts Representative	Napa	Sacramento	Butte	Tulare San Joaquin	Awaiting Rep	Los Angeles <small>Note: includes representation from DPSS and DCFS</small>
Analytics Power Users Representative	San Francisco	Sacramento Placer	Butte	Tulare	Orange	Los Angeles

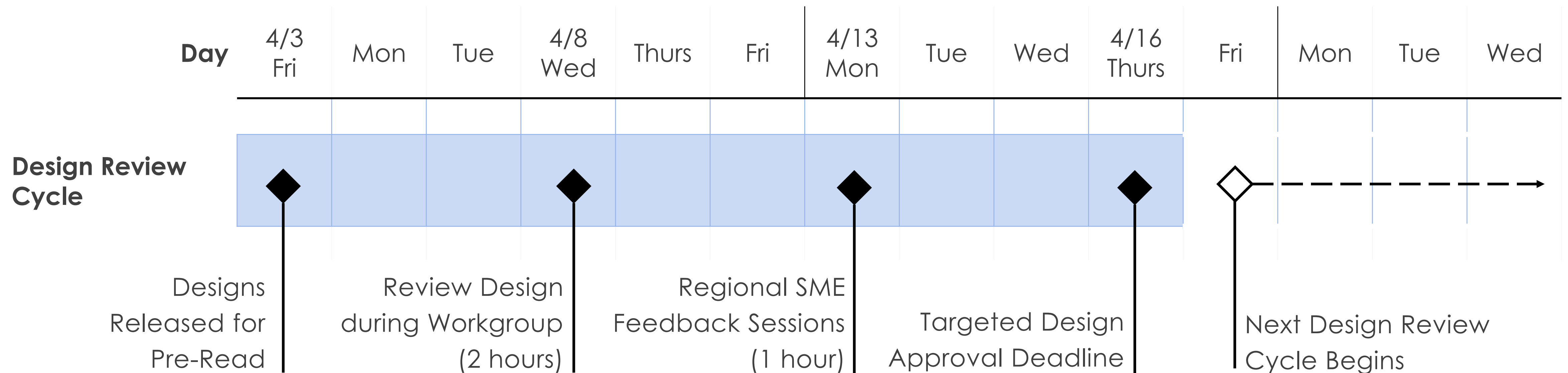
*\* Note: CDSS and DHCS are part of Analytics workgroup and will participate in the design sessions*

# Analytics Workgroup Design Review



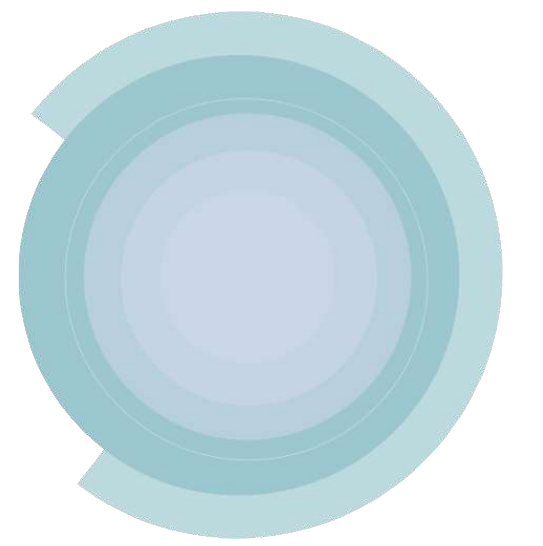
## Review Cycle Cadence for Approving Data and Analytics Products

- New Analytics Designs reviewed and approved through Data Analytics Workgroup
- Each cycle to include additional session per region where report SMEs not included in the workgroup can join and provide direct feedback
- Provides 10 business days per cycle to review and approve report designs (~20 reports / dashboards pages per cycle)
- Participants expected weekly time commitment approximately 5-8 hours



# Application Subject Area – Sprint 1

## Pending Applications



### Legacy Reports & SCRs

- 1 - Qlik Dashboard
- 4 - Qlik Reports
- 5 - 3<sup>rd</sup> Party Vendor Reports
- 3 - Pending App SCRs

### Feedback from Data Analytics Workgroup

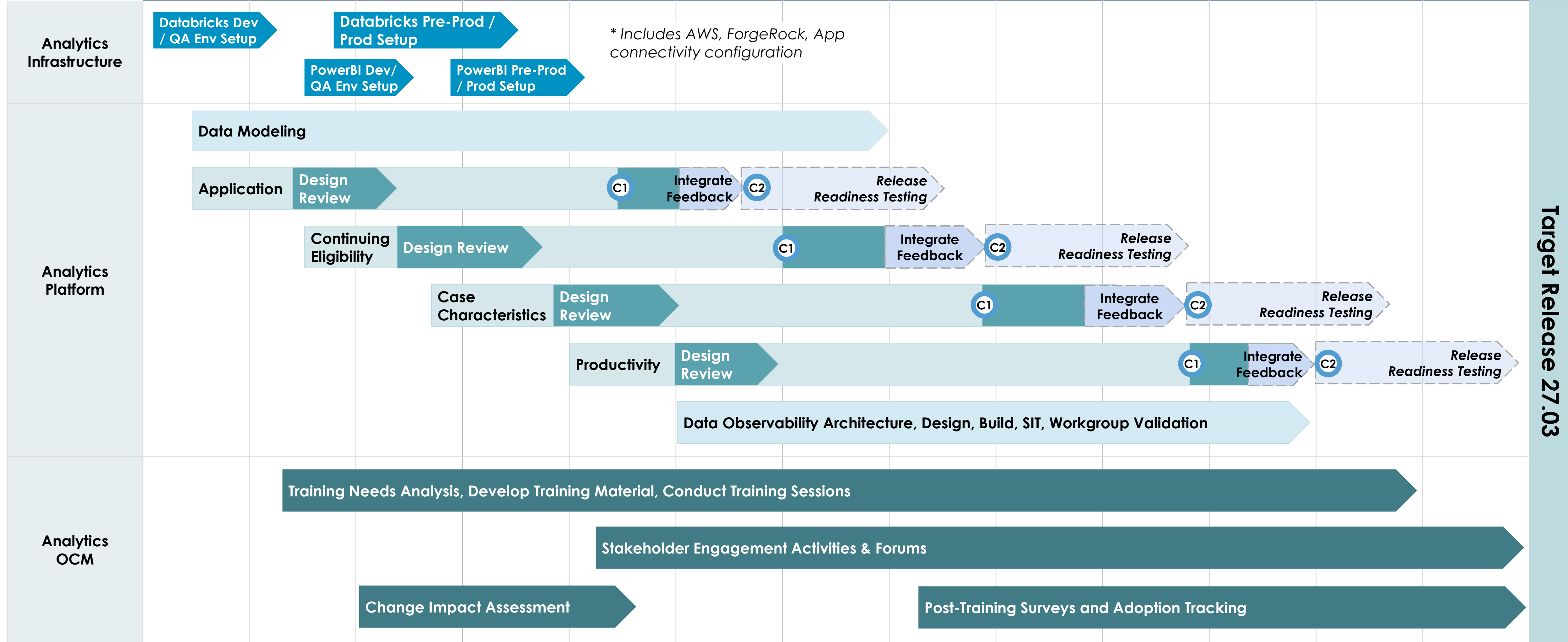
- Merge redundant reports for ease of access
- Bring in more App details like source, unit, etc.
- Additional metrics like app age and due date
- Key worker details like unassigned apps

## Single, Unified Location for Pending Application Insights

- ✓ One dashboard with drill-downs to answer key business questions from all existing reports
- ✓ **For the Executive** – At-a-glance view of County-wide, core Application KPIs
- ✓ **For the Operation Manager** – Summary Metrics, Data Visualizations, and Staff Hierarchy views to answer, *“How do I best manage my staff’s application workload?”*
- ✓ **For the Line Staff Worker** – Detailed report to view specific application details to answer, *“Which applications should I prioritize today?”*

# Phase 1 Execution Timeline

Mar '26	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan'27	Feb	Mar
1	2	3	4	5	6	7	8	9	10	11	12	13

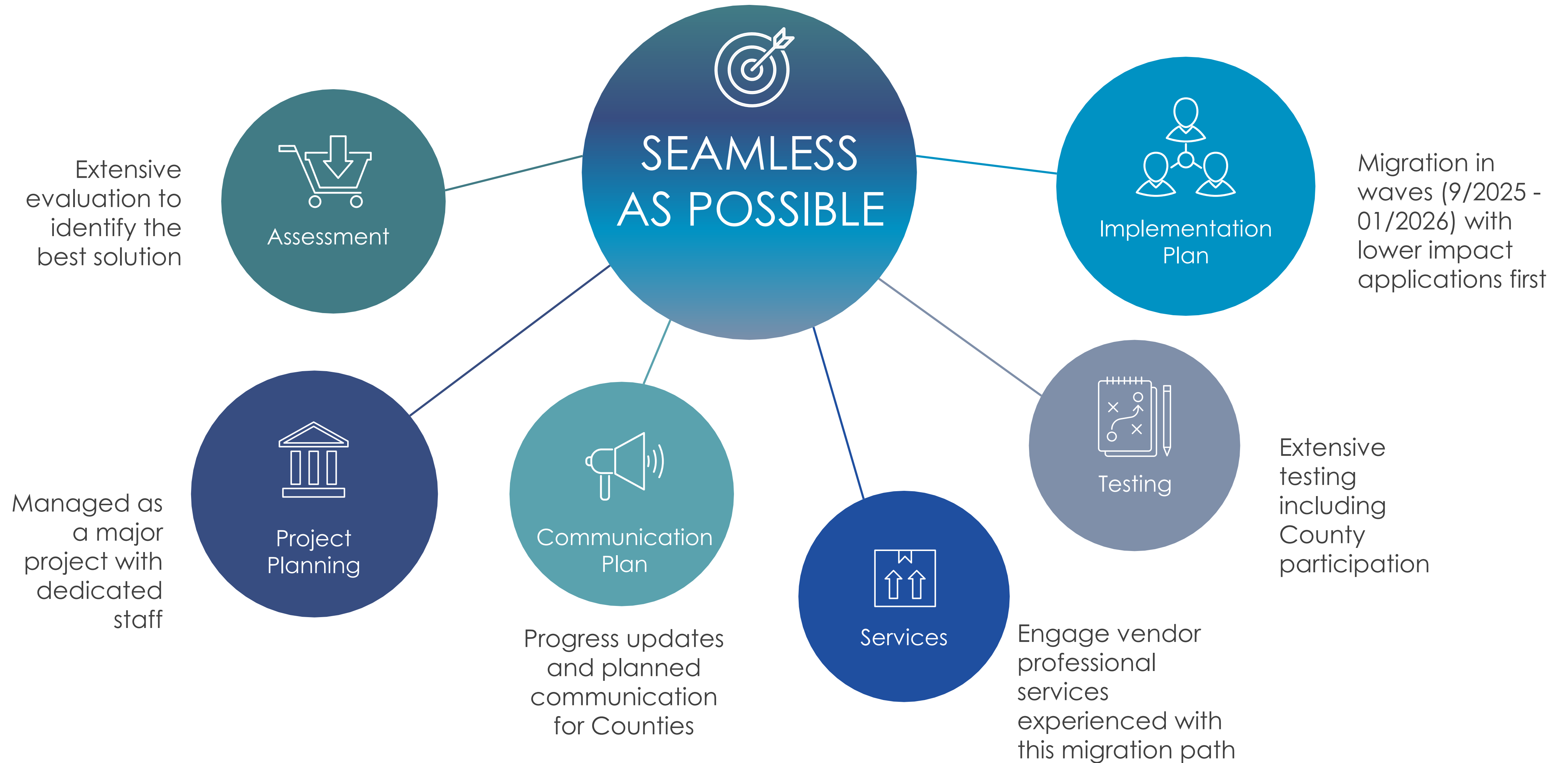


# Identity Access Management (IAM) Update

# IAM Replacement

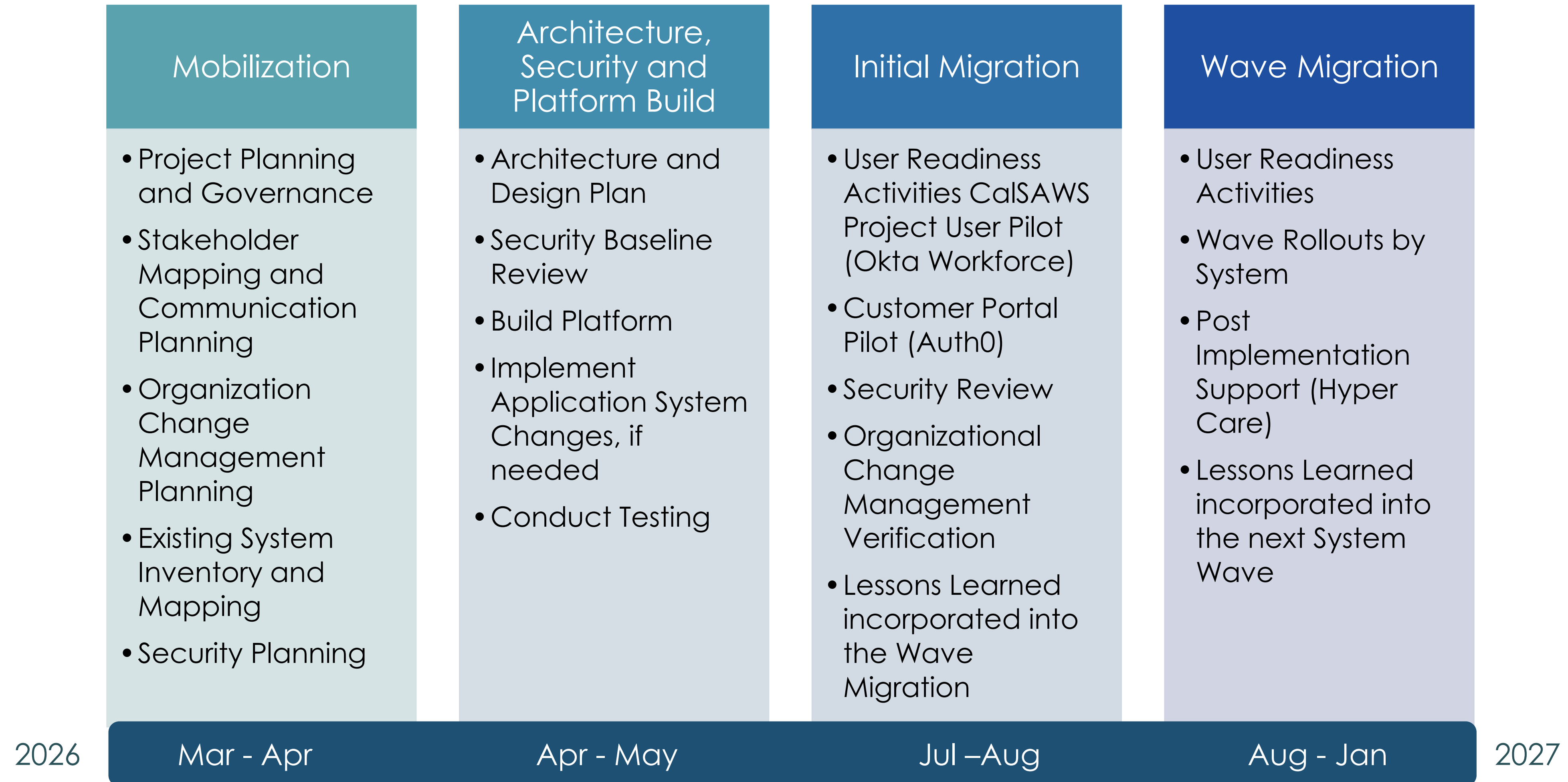
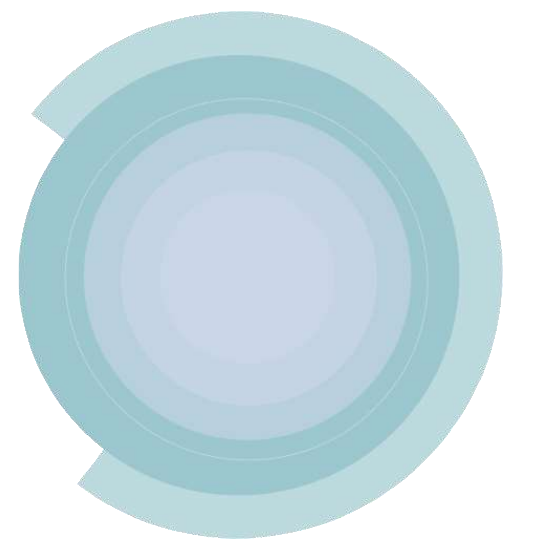
## Objective

Major change required regardless of solution



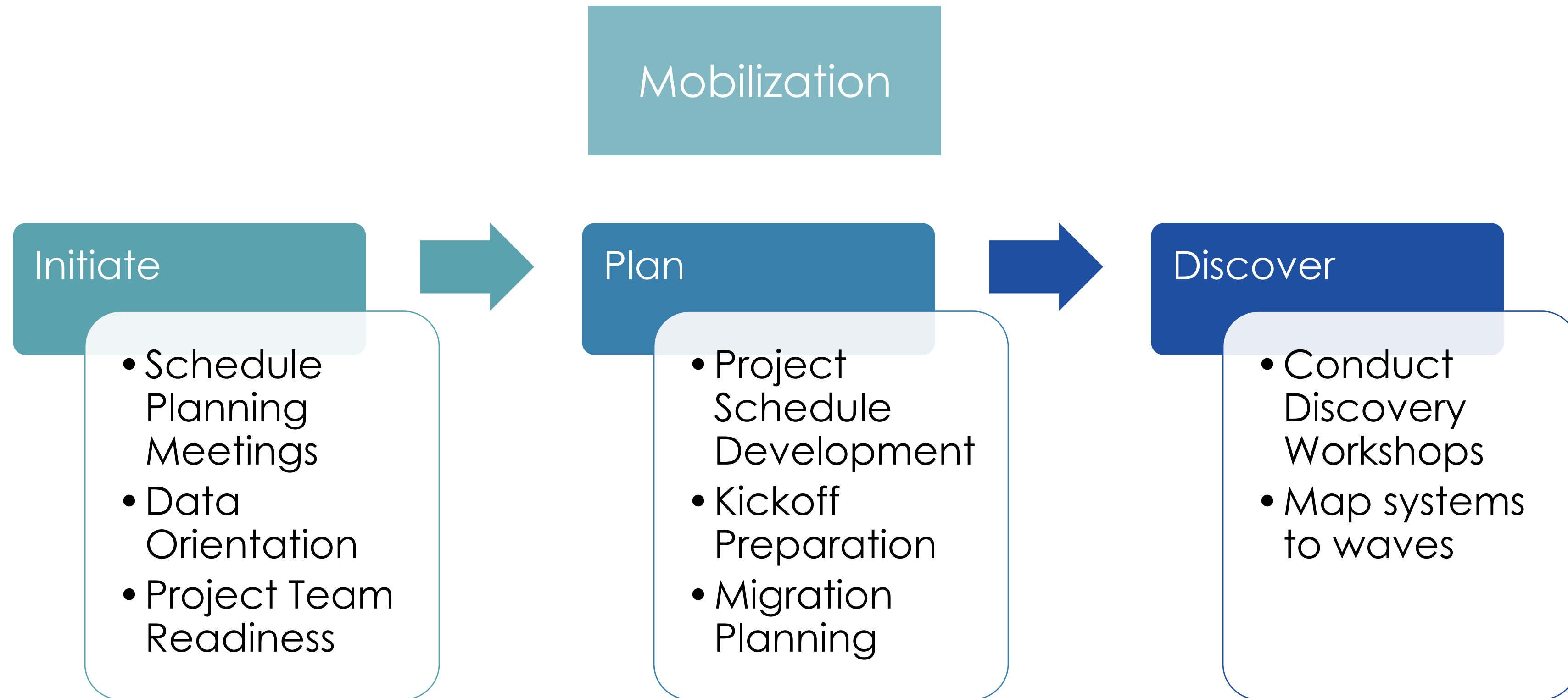
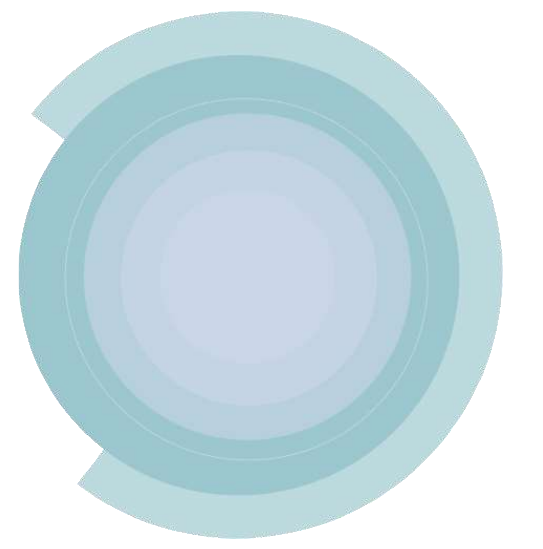
# IAM Replacement

## Timeline



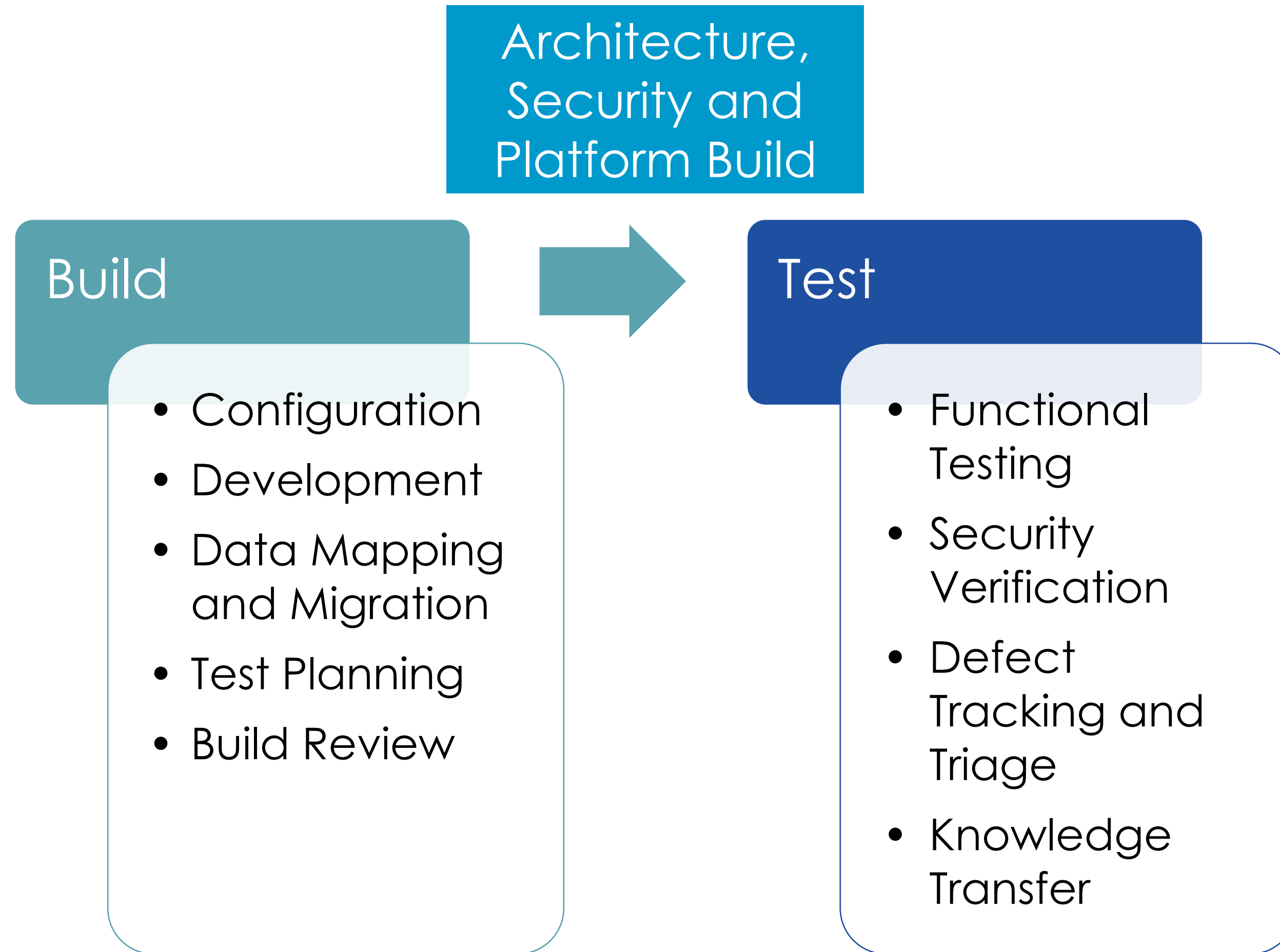
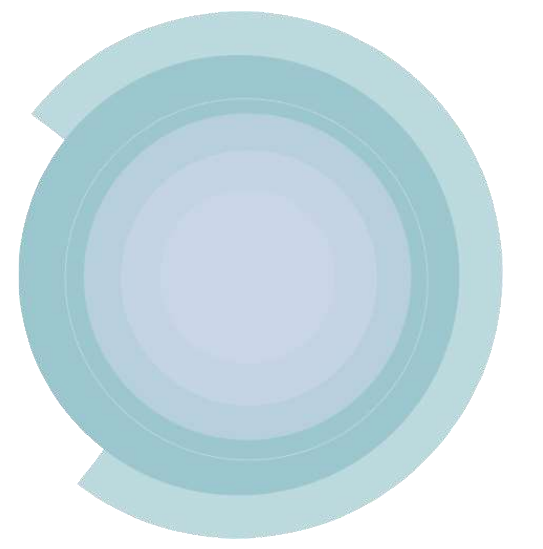
# IAM Replacement

## Mobilization



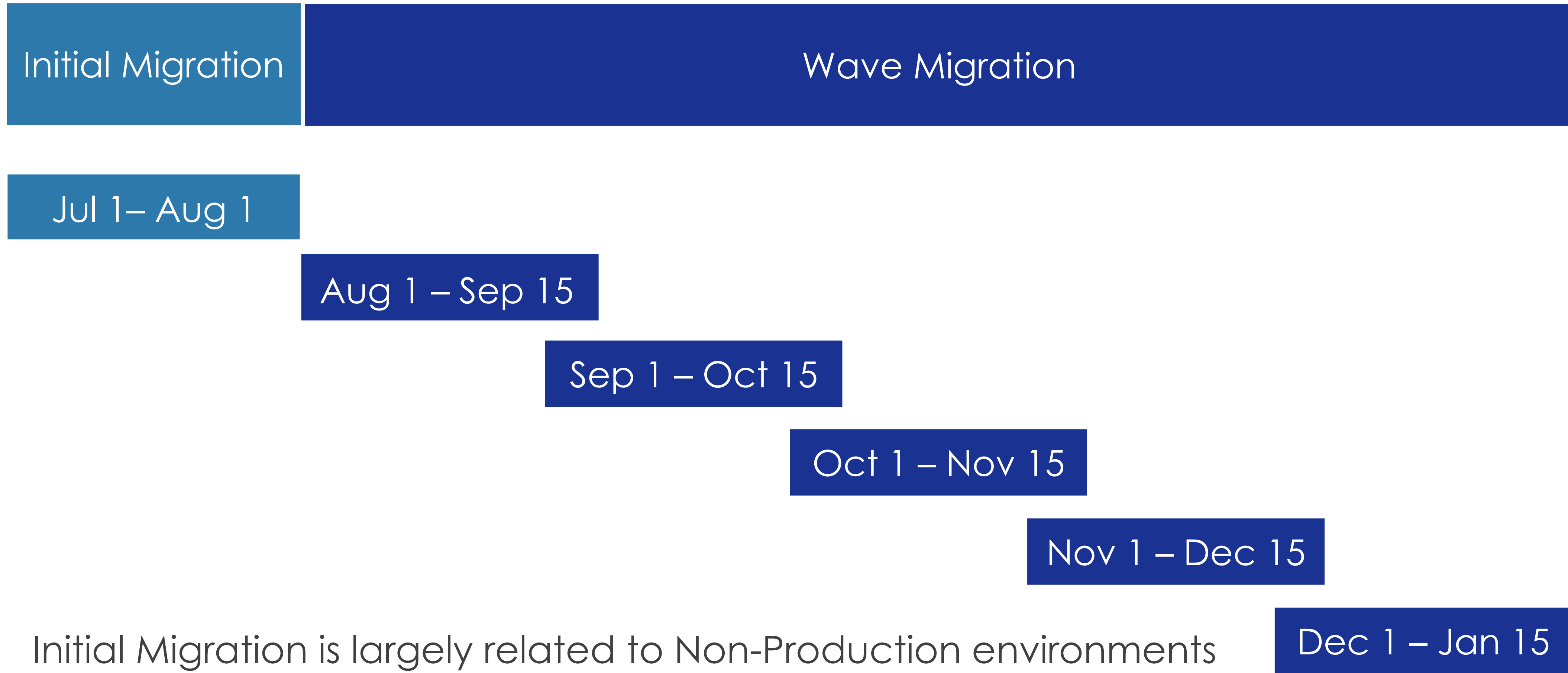
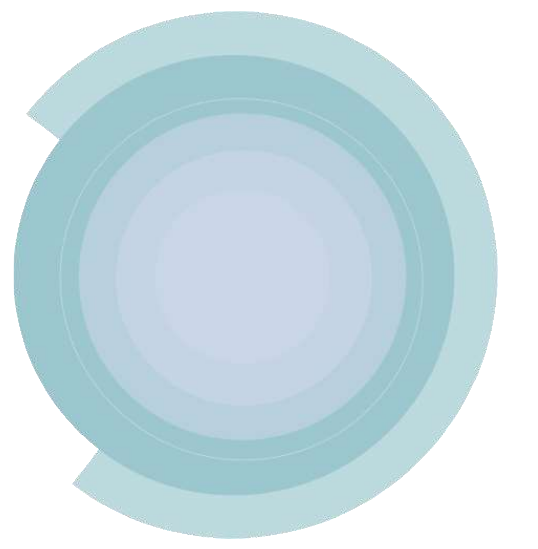
# IAM Replacement

## Architecture, Security and Platform Build



# IAM Replacement

Migration – Draft Wave Timing to be Confirmed During Planning

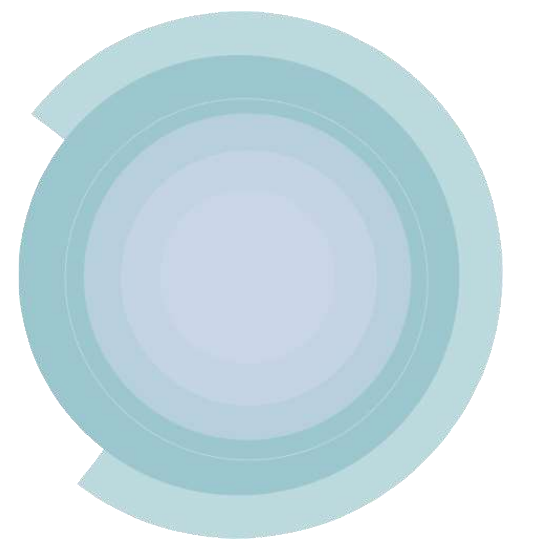


- Initial Migration is largely related to Non-Production environments
- Wave Migrations are largely Production related

# Overview of Oracle Infrastructure Update

# Oracle Databases@AWS

What Is It and Why Change?

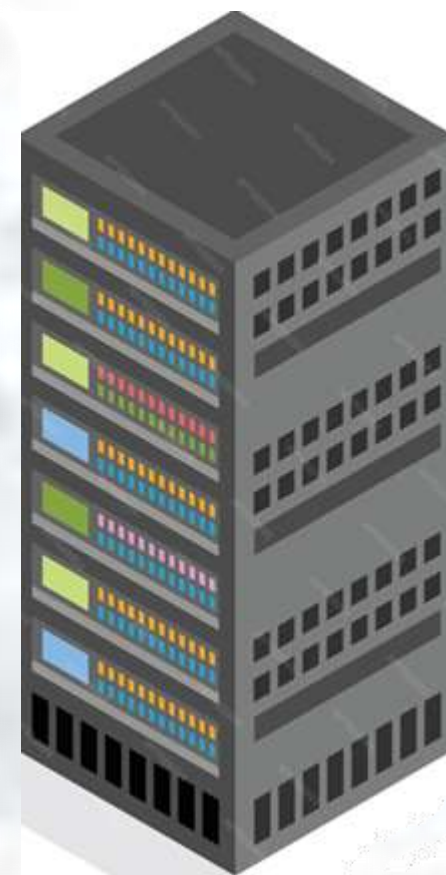


**REPLACE**



**Oracle Databases  
deployed on AWS  
EC2 Servers**

AWS



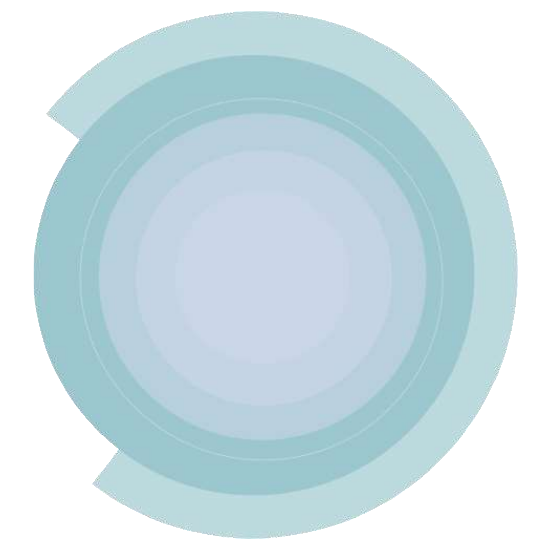
**Oracle Databases  
deployed on Oracle  
Exadata Servers at AWS**

## 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

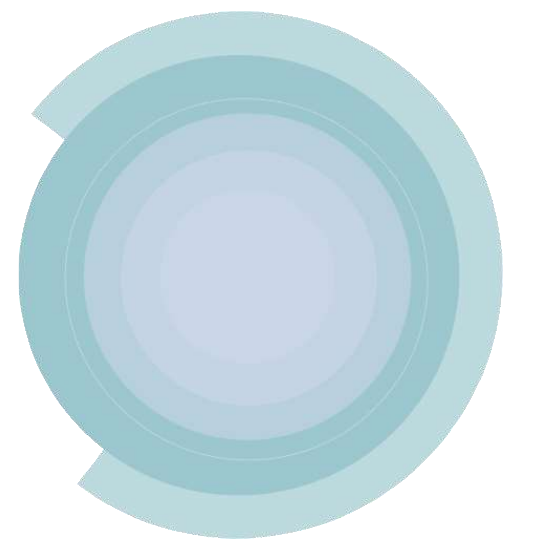
# Oracle Databases@AWS

When? Database Server Migration Only



# Oracle Databases@AWS

## Performance and Functional Testing Rounds



**First Baseline Database Metrics**

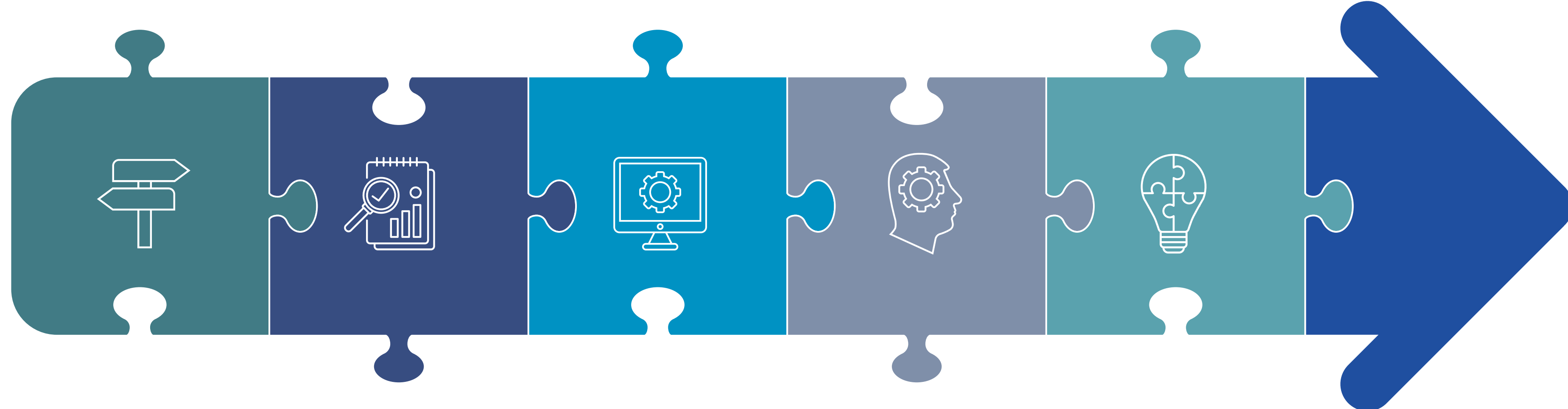
(Completed, February)

**AWS Network Changes Implementation**

(March)

**Third Performance Baseline**

(End of April)



**Perform Performance Tuning**

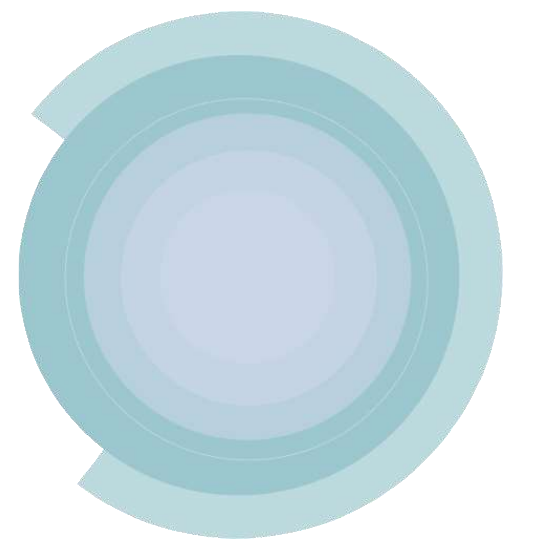
(In Progress  
February – March)

**Second Baseline with Initial Tuning**

(Early April)

# Workload Management Overview

# Workload Management Redesign

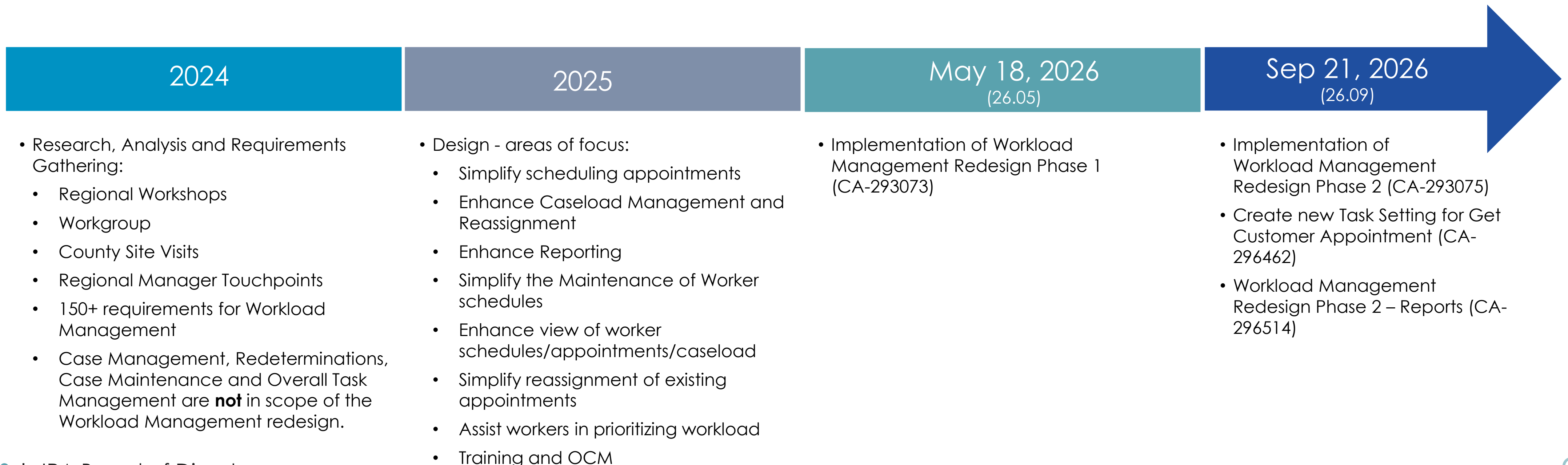


**Objective:** Enhance CalSAWS to assist staff in assigning appointments to workers, scheduling and rescheduling appointments, establishing worker availability, and tracking appointments.

**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 and CRFI 25-021
- **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

## GOALS



# Workload Management Project & OCM Activities

What has been done and what is coming up next to prepare counties for changes to the Workload Management system

## DESIGN & PLAN

- Design Approved
- OCM Plan Developed

## TEST & COMMUNICATE

- System Test Started
- March Bulletin Distributed
- Regional Meetings Hosted

## GO-LIVE

- Phase 1 Go-Live
- Go-Live Readiness OCM Support
- Phase 2 Design Approved
- County Validation Ends



## DEVELOP & ANALYZE

- System Build Started
- Usability Committee Meeting Hosted
- Change Impacts Analyzed
- February Bulletin Distributed

## TEST & DEMO

- System Test Continue
- Enhanced Demonstrations Conducted (County Facing)
- Workload Management Webcast
- Communicate Changes
- April Bulletin
- Conclude Regional Meetings
- County Validation Begins

## POST GO-LIVE

- Post-Implementation Office Hours
- Phase 2 Continues

Note – County facing resources including but not limited to: Bulletins, Demonstration Recordings, and FAQs will be available via the Communication Portal pre & post Go-Live

# Activity Spotlight: Regional Meetings

## OBJECTIVE

- Provide an overview of the future-state Workload Management capabilities
- Address questions raised during recent discussions
- Highlight how enhancements will benefit counties
- Offer an opportunity for open dialogue

## TOPICS

- **Project Overview**
  - Historical Context
  - Phase 1 & Phase 2
- **System Breakdown**
  - Functional Area Change Summary
  - Current vs. Future State Visual Details
- **OCM Overview**
  - Timeline
  - Activities & Resources
  - Highlight

## DATES

**March 26 | March 27 | April 9**

## AUDIENCE

**Directors | Regional Managers**

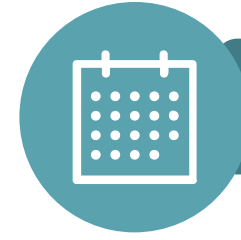
# Workload Management at a Glance

Upcoming CalSAWS Workload Management enhancements will improve how workers manage schedules and book customer appointments

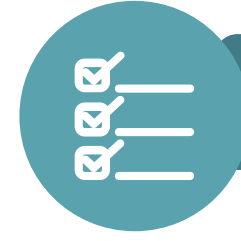
## PHASE 1



Appointment Management



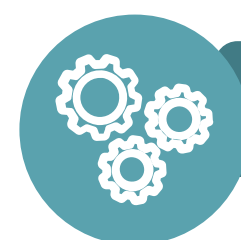
Schedule Management



Workload Management



Overall Management



Admin Configuration



Release 26.05

## PHASE 2



Workload Prioritization



Appointment Tasks



Reports

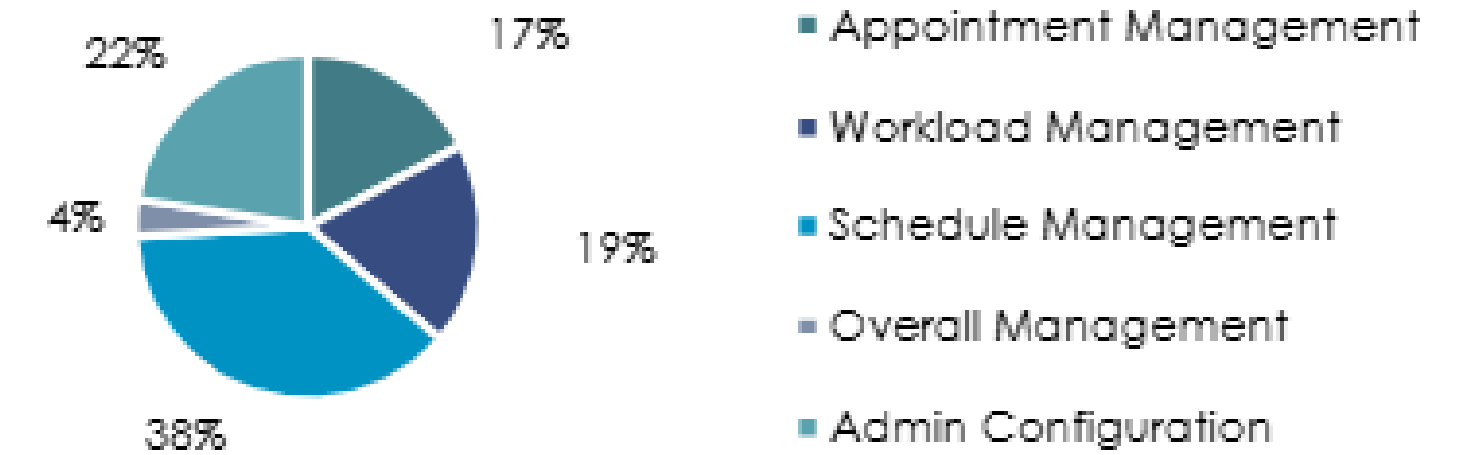


Release 26.09

# Workload Management | Impacts Dashboard

The Workload Management system will undergo updates aimed at enhancing features and 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

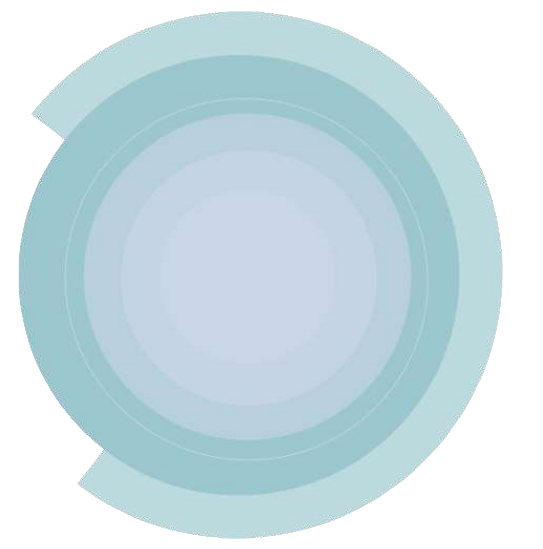


## OVERVIEW OF IMPACTED FUNCTIONAL AREAS

FUNCTIONAL AREA	PAIN POINTS	CURRENT STATE	FUTURE STATE
<b>APPOINTMENT MANAGEMENT</b>	Limited system support for assisted scheduling and reassignment; more reliance on manual steps/visibility gaps.	Staff use the homepage to view schedules and manage appointments/assignments, including manual creation and single-worker search.	Streamlined scheduling with guided assistance, improved history tracking, and expanded reassignment capabilities to speed appointment handling.
<b>WORKLOAD MANAGEMENT</b>	Workload reassignment and pending work allocation are more manual and/or harder to find and manage quickly.	Staff use existing list pages to view and reassign in-progress workload and confirm case and program assignments, while counties can download templates and upload documents to the system (not specifically for workload management).	Adds capacity-based reassignment, improved automated recurrence, and better visibility with expanded tools for assignment support, reassignment search/details, and pending workload tracking.
<b>SCHEDULE MANAGEMENT</b>	Schedule building, visibility, and maintenance are constrained (limited views and more fragmented actions).	Staff can search schedules by worker ID and view office/unit schedules, weekly schedules, and availability to support workload management; counties can download templates and upload documents to the system.	Improves schedule views and filters, adds availability controls, updates access rights, and expands scheduling with new availability and template pages, schedule uploads, and enhanced search features.
<b>OVERALL MANAGEMENT</b>	Users spend more time navigating across areas to find what matters for their day.	CalSAWS has a Homepage, but it lacks a streamlined "next 7 days" view (appointments, assignments, due/overdue tasks, and critical e-Messages) and routes "My Schedule" date links to the Daily Schedule page.	Adds a new My Work page and refreshed Homepage to quickly orient users and streamline daily work.
<b>ADMIN MANAGEMENT</b>	Caseload configuration is limited and worker level capacity configuration does not exist today.	Staff can manage and view role specific worker data, but counties must standardize an automation duration, work with preset schedule categories, face limited or no supervisor authorizations, and cannot export reassignment data for reporting.	New admin capabilities for caseload capacity configuration (including worker-level capacity), enabling more consistent setup and governance.

# Workload Management Redesign Phase I - Outreach Efforts

Workload Management Redesign Phase I (26.05 Release)



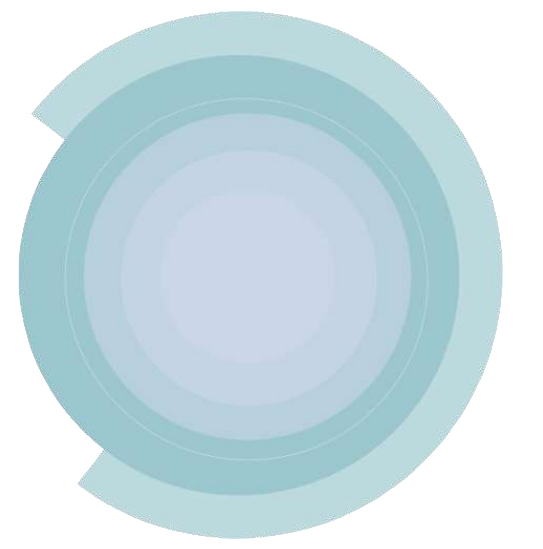
**SCR CA-293073** – Six targeted functionality demonstrations will be conducted by user group to support rollout and adoption:

- **Operations Staff (Everyday Users)**
  - April 15 (9:00 AM – 12:00 PM)
  - April 21 (1:30 PM - 4:30 PM)
- **Supervisors/Managers (Office/Unit Oversight)**
  - April 15 (1:30 PM – 4:30 PM)
  - April 21 (9:00 AM - 12:00 PM)
- **System Administrators**
  - April 16 (1:30 PM – 3:30 PM)
  - April 28 (9:30 AM - 11:30 AM)

## Resource Updates:

- Job Aids
- Quick Guides
- Web-based Training

# Workload Management Action Item

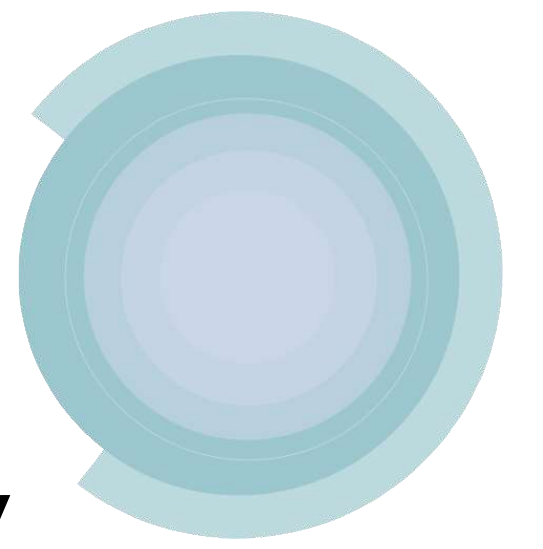


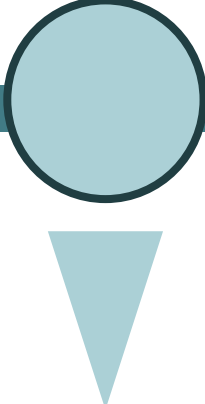
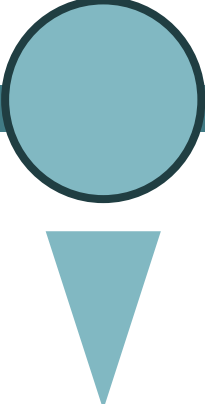
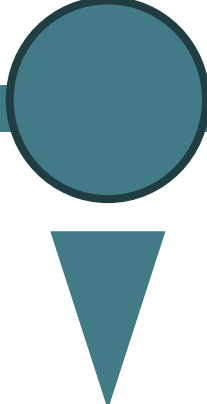
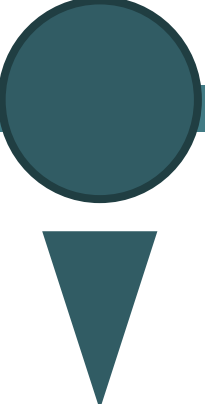
- SCR CA-246484 Create Banked Caseload Assignment Capability
  - Not Prioritized

# Policy & Release Update

# FCED OCM Activity Timeline

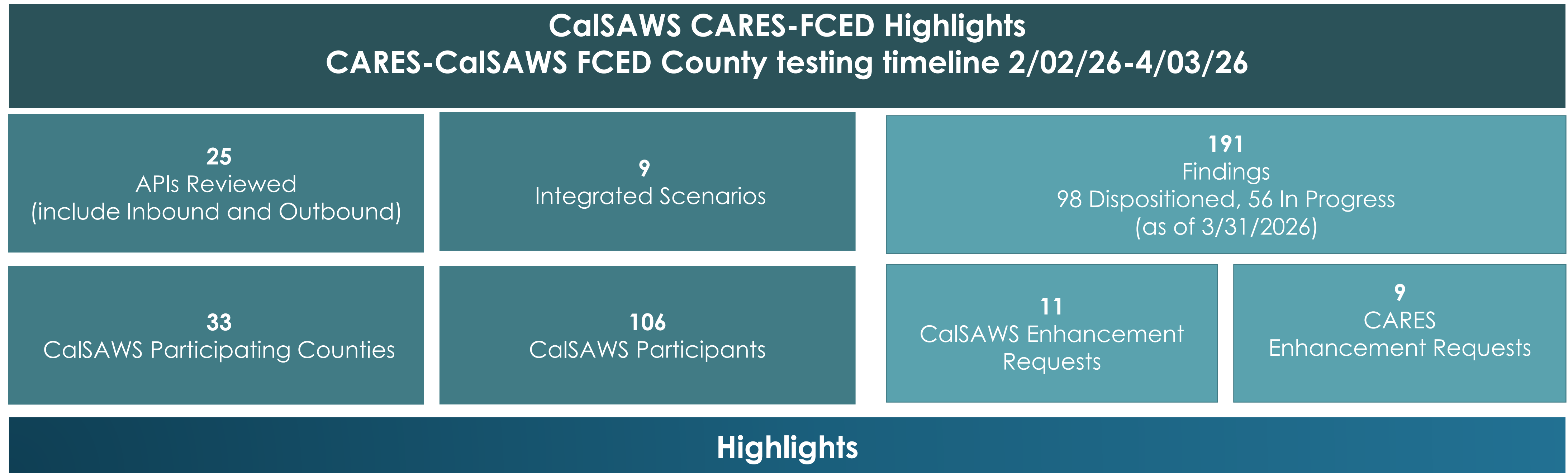
2026 Project and OCM Activities Planned for FCED Timeline and Needs (subject to change)



	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Nov
				
	<b>Assessment &amp; Development</b>	<b>Communications &amp; Engagement</b>	<b>Change Readiness Preparations</b>	<b>Go-Live &amp; Post Go-Live Support</b>
	<b>Analyze change impacts, develop communications templates, and assess stakeholder groups</b>	<b>Collaborating and delivering communications materials and engaging with stakeholders</b>	<b>Implementing activities to additionally prepare staff readiness for Go-Live</b>	<b>OCM support (as-needed) during and post Go-Live</b>
<b>OUTPUTS</b>	<ul style="list-style-type: none"> <li>• Change Impact Data</li> <li>• Mitigation Strategies</li> <li>• Communications Templates</li> <li>• Stakeholder Ecosystem</li> </ul>	<ul style="list-style-type: none"> <li>• Newsletter Content Support</li> <li>• One-Pagers, FAQs, Talking Points</li> <li>• Continued Functionality Demonstrations (Demos)</li> </ul>	<ul style="list-style-type: none"> <li>• Readiness Pulse Checks/Surveys</li> <li>• OCM Go-Live Readiness Checklists</li> <li>• Readiness Communications</li> </ul>	<ul style="list-style-type: none"> <li>• Go-Live Oriented Communications</li> <li>• Go-Live Resources</li> </ul>

## PROJECT MILESTONES

<p><b>January</b></p> <ul style="list-style-type: none"> <li>• CalSAWS Extended User Scenario Testing (EUST3) Participation CRFI Recruitment</li> <li>• EUST3 Preparation &amp; Readiness (continued)</li> </ul> <p><b>February</b></p> <ul style="list-style-type: none"> <li>• EUST3 Begins</li> </ul> <p><b>March</b></p> <ul style="list-style-type: none"> <li>• Demo Sessions March 18<sup>th</sup></li> </ul>	<p><b>April</b></p> <ul style="list-style-type: none"> <li>• EUST3 Ends April 2<sup>nd</sup></li> <li>• Demo Sessions April 1<sup>st</sup>, 15<sup>th</sup>, and 29<sup>th</sup></li> </ul>	<p><b>October</b></p> <ul style="list-style-type: none"> <li>• Go-Live</li> <li>• Post Go-Live Support Start</li> </ul> <p><b>November</b></p> <ul style="list-style-type: none"> <li>• Post Go-Live Support End</li> </ul>
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### Highlights

#### Highlights – Functional Summary

- 25 CARES-FCED Inbound and Outbound Application Program Interface (APIs) transactions
- CARES-FCED Batches
- CARES-FCED Tasks
- CARES-FCED Security Groups
- Extended (LA) Automation

#### Training

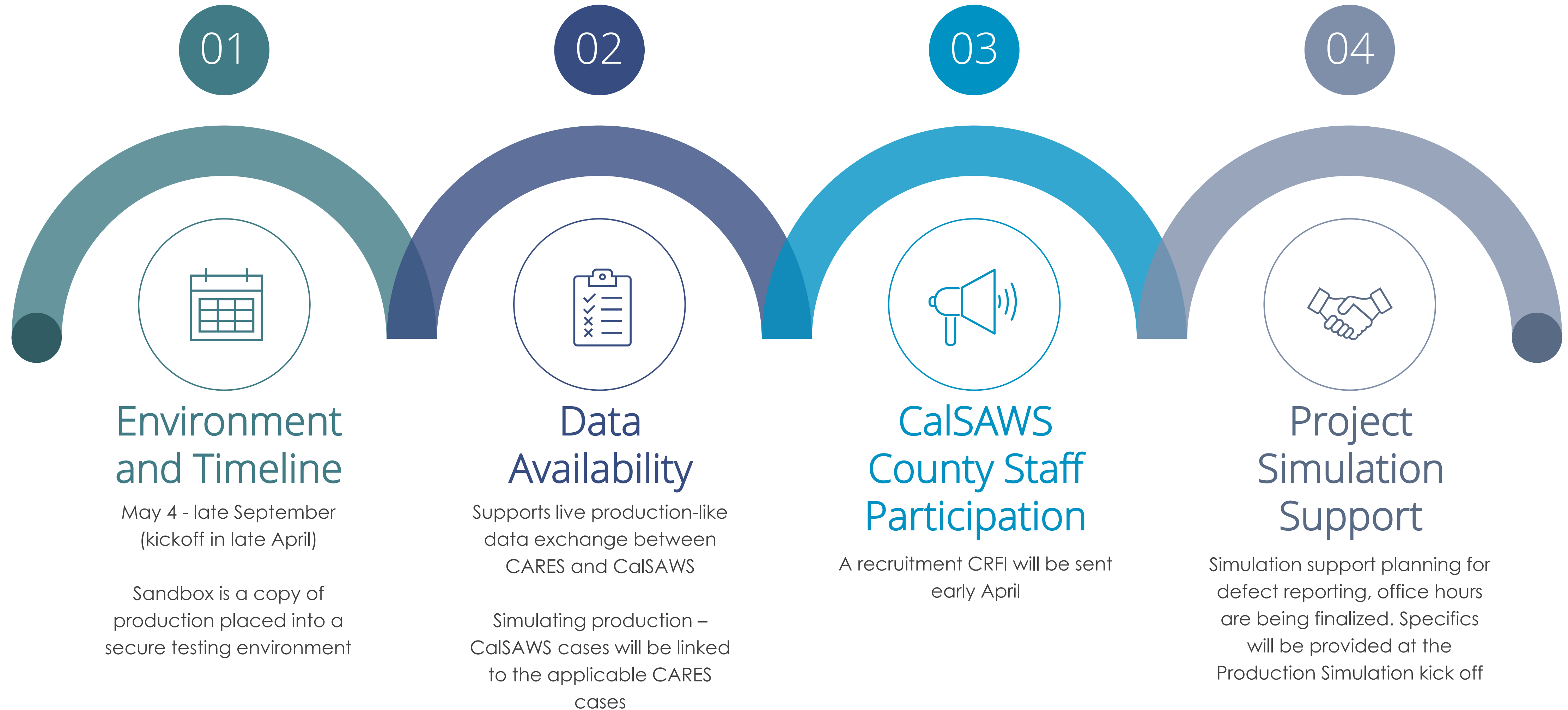
- Receiving and processing electronic data
- Document access

#### Operational Change Management

- Admin vs. Eligibility Process Role File

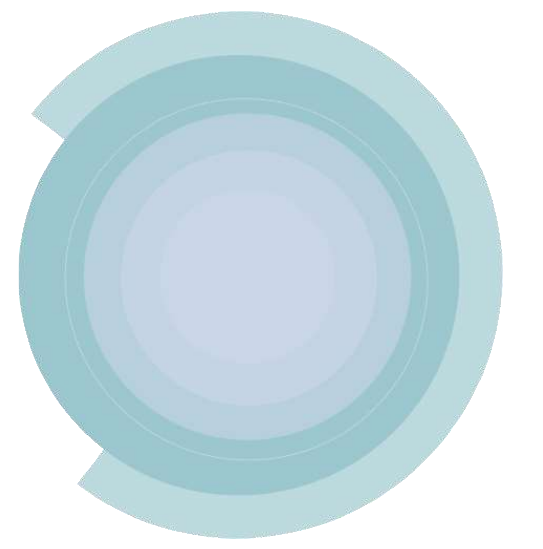
# Objective

Provides county users with an opportunity to get hands-on experience with CARES FCED functionality in a sandbox environment prior to the October 2026 go-live



# Release and Policy Update

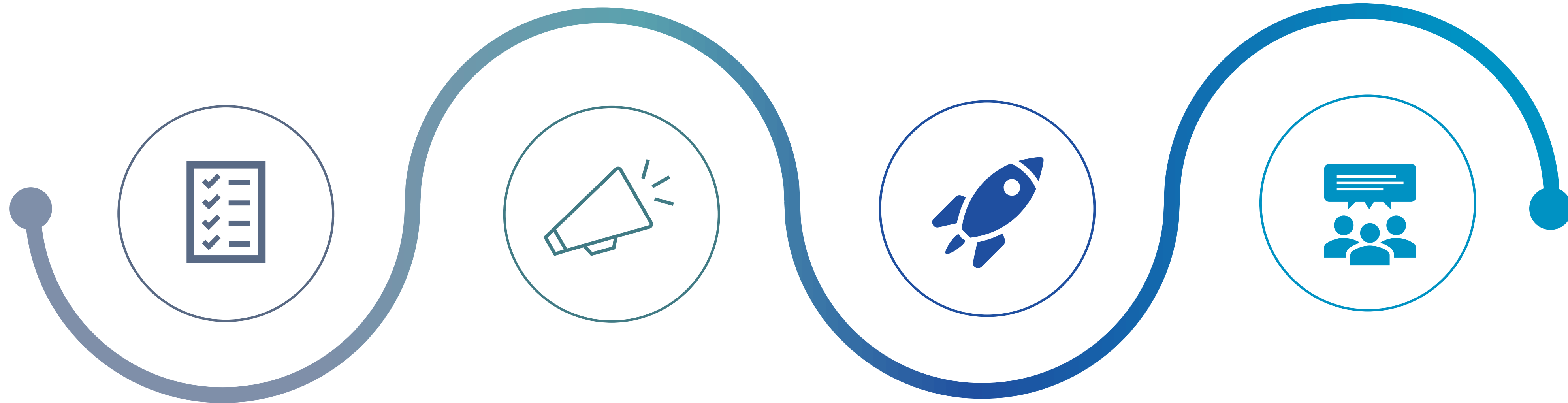
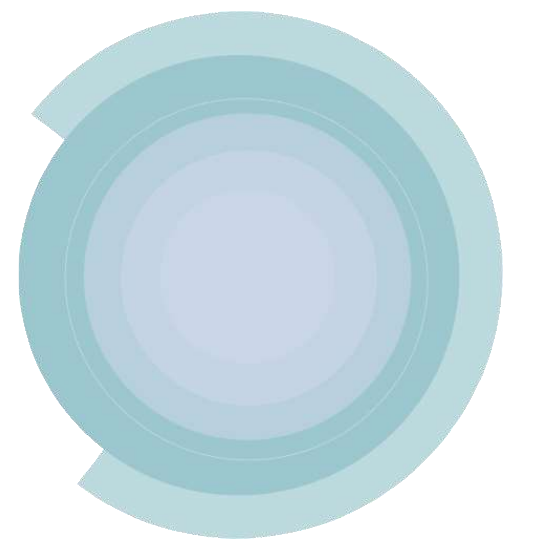
## Upcoming Releases



<b>April</b> Priority Releases	<b>May</b> Baseline (5/18/2026) and Priority Releases	<b>June</b> CalHEERS Baseline (6/15/26) & Priority Releases	<b>July</b> Baseline (7/20/2026) and Priority Releases
<p><b>4/09/2026:</b></p> <ul style="list-style-type: none"><li>• CF Ineligible Status Being Carried Forward Into New Certification Period (CA-298883)</li><li>• CF ES Being Set to No for Intake EDBC When App Date is Past the 15th and is Approved (CA-298978)</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>06/15/2026:</b></p> <ul style="list-style-type: none"><li>• Reduced Timeframes for Retroactive Medi-Cal (CA-292997)</li><li>• CalHEERS eHIT SCRs:<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></ul></li><li>• Updates to Federally Recognized Tribes (CA-292648)</li></ul>	<p><b>7/20/2026:</b></p> <ul style="list-style-type: none"><li>• ABAWD Enhancement HR1 Workgroup - Update Work Registration Exemption Determination for "Cares for Dependent Child Under 6" (CA-298215)</li><li>• CalFresh Processing HR1 Work Group - Automate Expense Contributors (CA-296576)</li></ul>

# Release and Policy Update

Upcoming Release 26.05



## TESTING

System Test, QA, and County Validation are in progress

## RELEASE COMMUNICATION

### Major Upcoming Changes (MUC)

**Draft:** 03/27/2026  
**Final:** Week of 04/06/2026

**Webcast:** 04/28/2026

**Newsletter and Release Notes:**  
Week of 05/12/2026

## DEPLOYMENT

**Greenlight:** 05/13/2026

**Deployment:** 05/17/2026

## POST RELEASE

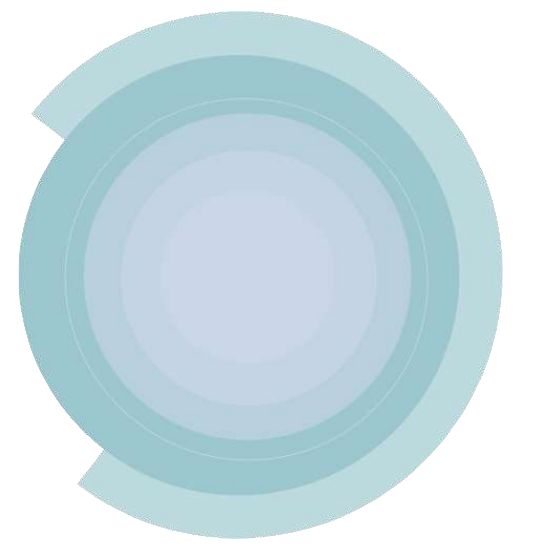
**Post-Release Daily calls:**  
05/18/2026 – 05/20/2026

# HR-1 Workgroups Update



# CalSAWS HR1 Workgroup Updates

# HR1 ABAWD Policy



## HR1 ABAWD Policy SCRs

SCR	Summary	Policy Effective Date	Target Release
CA-296476	HR1 - Add CF 377.11E to the CF RE, ESAP RE, and CW/CF RE Packets	6/1/2026	April 30, 2026 - (26.04.30)
CA-294575	HR1 - Changes to ABAWD Exemptions and Expiration of Statewide Waiver	6/1/2026	May 18, 2026 - (26.05)
CA-291366	HR1 - CF 886 to Inform CalFresh Households About Their Work Registrant and ABAWD Status	6/1/2026	May 18, 2026 - (26.05)

## HR1 ABAWD Outreach Efforts

### Demo planned:

May 12<sup>th</sup> (2:30 PM - 4:30 PM) for functional changes made through SCR CA-294575 - Changes to ABAWD Exemptions and Expiration of Statewide Waiver

### Resource Updates:

- Job Aid
- Quick Guides
- Web Based Training

# 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 HR1 ABAWD policy changes.



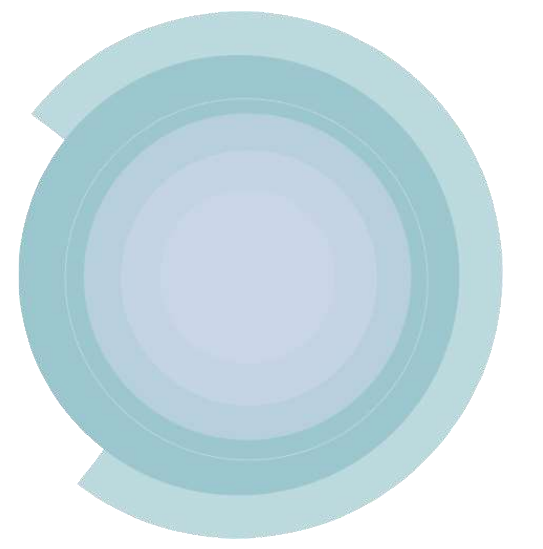
**Representation:** 17 counties; 6 regions; CDSS and CalSAWS leadership

- Butte
- El Dorado
- Fresno
- Humboldt
- Los Angeles
- Marin
- Mendocino
- Placer
- Riverside
- Sacramento
- San Bernardino
- San Joaquin
- Santa Barbara
- Santa Clara
- Sonoma
- Stanislaus
- Sutter



**Timeline:** December 17, 2025 to February 18, 2026

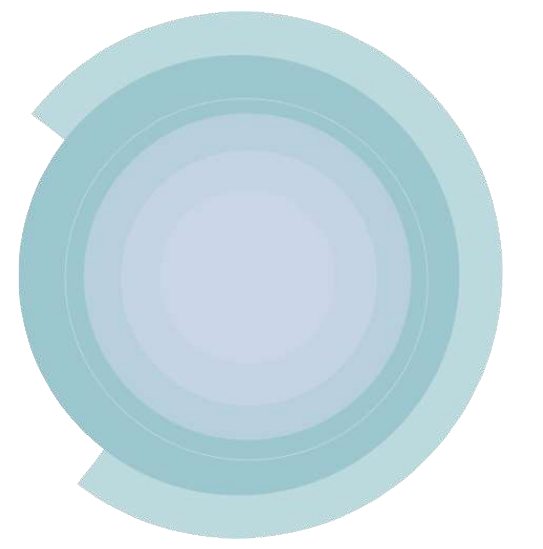
# HR-1 ABAWD Enhancement Workgroup



## 6 Enhancements Prioritized

#	Current State	Enhancement	SCR #	Target Release
1	<b>Cares for a Child Under 6 Work Requirement</b> <ul style="list-style-type: none"> <li>No automated system check to alert workers when a child is no longer in the home</li> <li>Manual confirmation of allowed exemption required</li> </ul>	<b>Cares for a Child Under 6 Work Requirement</b> <ul style="list-style-type: none"> <li>Include an EDBC validation to confirm the child is in the home for the parent to be determined eligible for this exemption</li> </ul>	CA-298215	26.07 (previously late summer)
2	<b>CalFresh Work Registration</b> <ul style="list-style-type: none"> <li>No clear indicator for workers to distinguish between manual and system determined CalFresh work registration determinations</li> </ul>	<b>CalFresh Work Registration</b> <ul style="list-style-type: none"> <li>Provide “manual” and “system” indicators on the CalFresh Work Registration Detail page</li> </ul>	CA-297868	26.09 (previously late fall)
3	<b>Working 30 Hours per Week Exemption</b> <ul style="list-style-type: none"> <li>Workers select the “Working 30 Hours per Week” exemption in CalSAWS for migrant or seasonal farmworkers who meet the required work hours within 30 days</li> </ul>	<b>Working 30 Hours per Week Exemption</b> <ul style="list-style-type: none"> <li>Add a distinct exemption label for migrant or seasonal farmworkers who meet the required work hours</li> </ul>	CA-297868	26.09 (previously late fall)

# HR-1 ABAWD Enhancement Workgroup



## 6 Enhancements Prioritized

#	Current State	Enhancement	SCR #	Target Release
4	<b>Educational Hours</b> <ul style="list-style-type: none"> <li>Workers utilize the ABAWD Non-Scheduled Activity record to capture educational hours that count toward a participant's ABAWD work requirements</li> </ul>	<b>Educational Hours</b> <ul style="list-style-type: none"> <li>Allow workers to record education hours directly within a dedicated section of the School Attendance Detail page</li> </ul>	CA-298982	26.11
5	<b>CF 888 Form</b> <ul style="list-style-type: none"> <li>Workers generate the CF 888 to verify volunteer hours via the Template Repository</li> </ul>	<b>CF 888 Form</b> <ul style="list-style-type: none"> <li>Enable the generation of the CF 888 form directly from the Non-Scheduled Work Activity Detail page</li> </ul>	CA-298982	26.11
6	<b>CF 887 Form</b> <ul style="list-style-type: none"> <li>Workers generate the CF 887 to document medical conditions via the Template Repository</li> </ul>	<b>CF 887 Form</b> <ul style="list-style-type: none"> <li>Enable the generation of the CF 887 form directly from the Medical Conditions page</li> </ul>	CA-298982	26.11



# BenefitsCal Workgroup Updates for HR1

# Progress made towards HR1 with BenefitsCal Workgroups

## CF Processing Workgroup

- Milestone 4 session completed (3/19/26)
- 23 bundled enhancement requirements shared with participants for prioritization
- Advocate priority rankings due 4/3/26
- Prioritized bundled enhancement requirements on track to be sent to CalSAWS for Committee share out

## TRUV Workgroup

- Milestone 2 session completed (2/26/26)
- 21 enhancement requirements to be incorporated in the designs working with Truv
- Designs to be presented as part of Milestone 3 at the April UCD session
- Designs in partnership with CalSAWS and Committee for end-to-end (customer-to-worker) experience

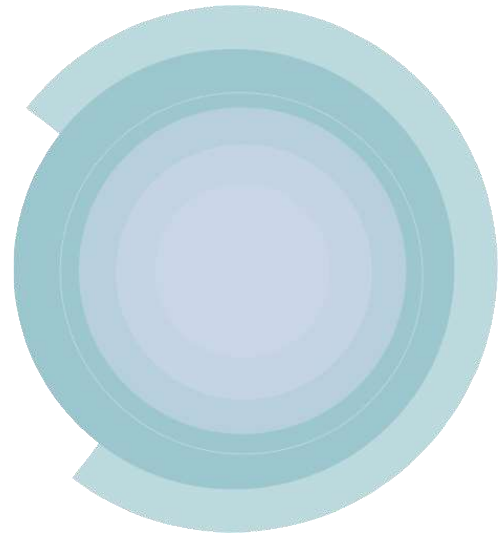
## ABAWD Workgroup

- Milestone 3 session completed (2/25/26)
- 36 bundled enhancement requirements shared with participants for prioritization
- Advocate priority rankings received 3/12/26
- Prioritized bundled enhancement requirements on track to be sent to CalSAWS for Committee share out

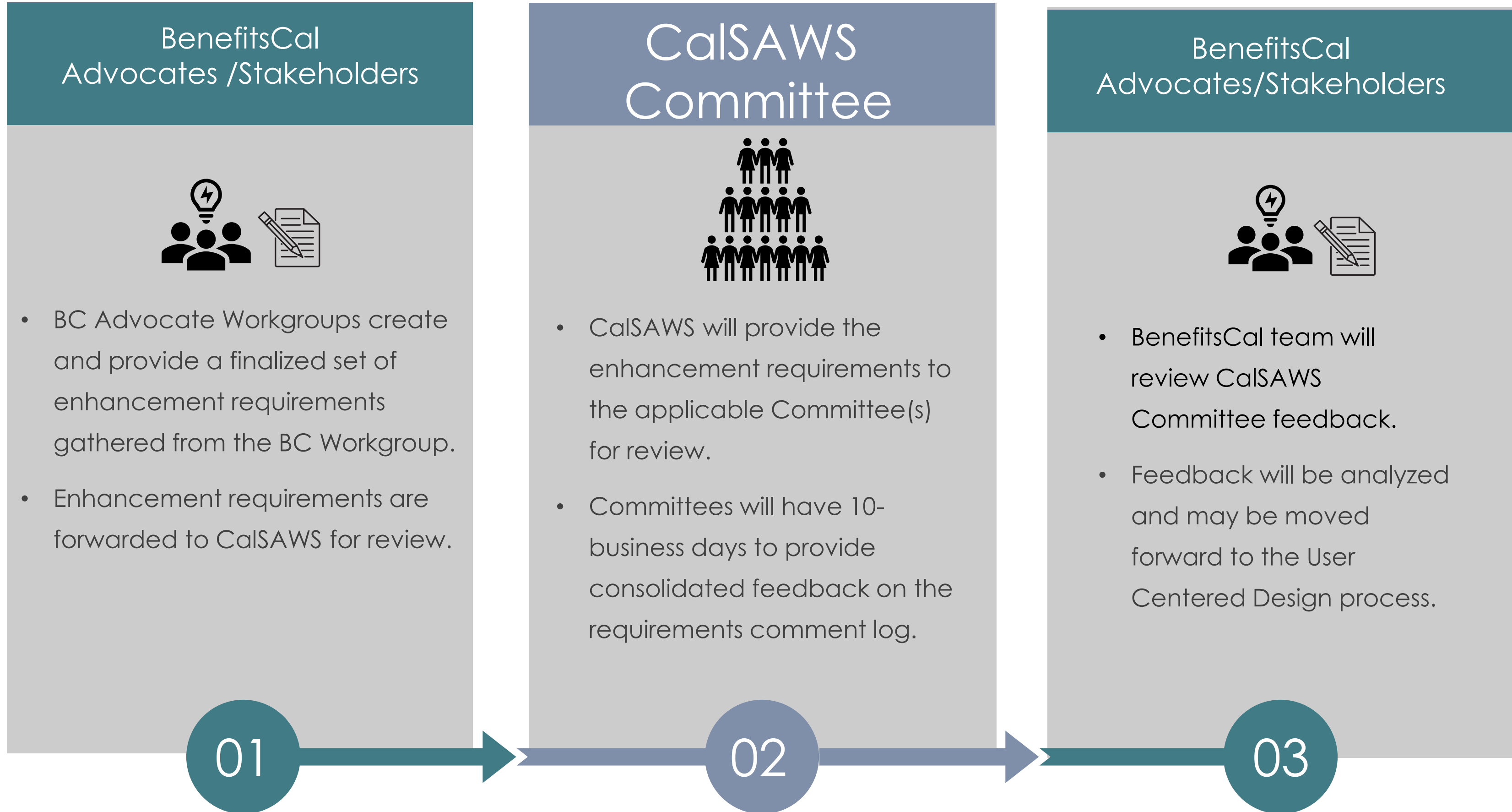
## Medi-Cal Workgroup

- Milestone 3 session completed (4/2/26)
- 30 bundled requirements being finalized for sharing with participants
- Advocate priority rankings due 4/15/26

# HR1: BenefitsCal Workgroup Enhancement Requirements Share out to CalSAWS

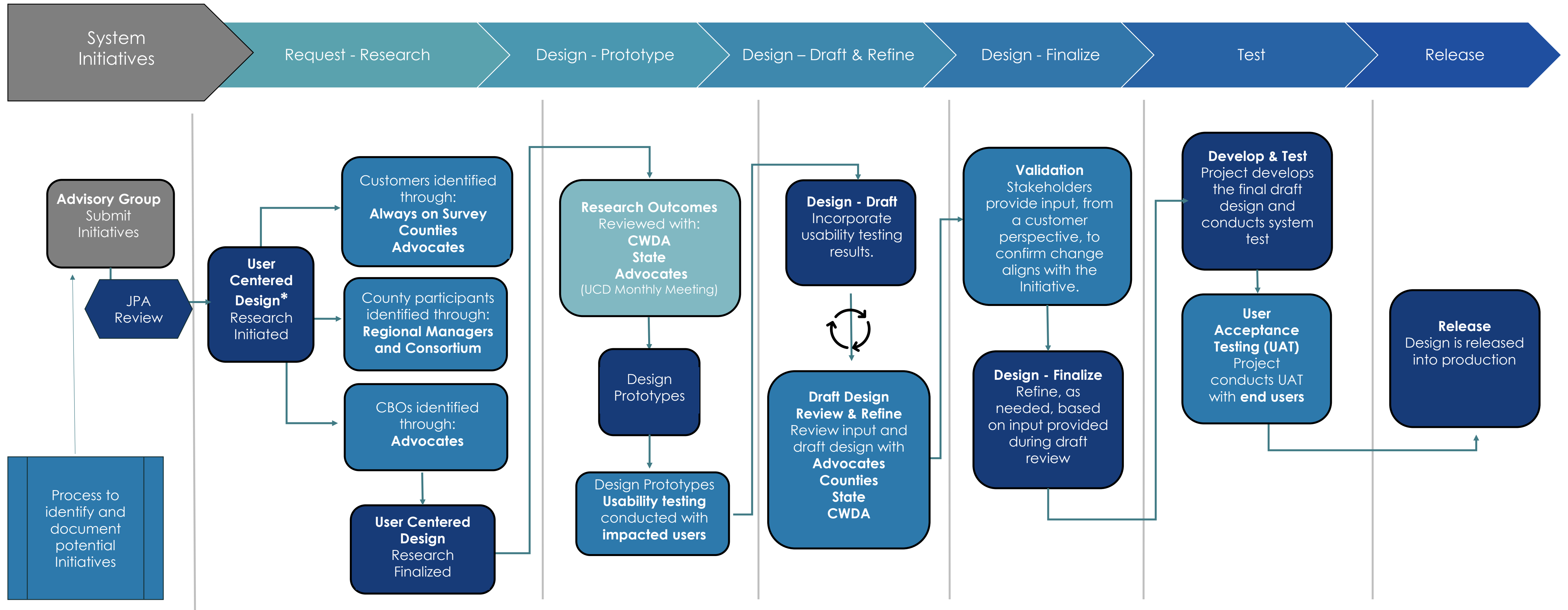
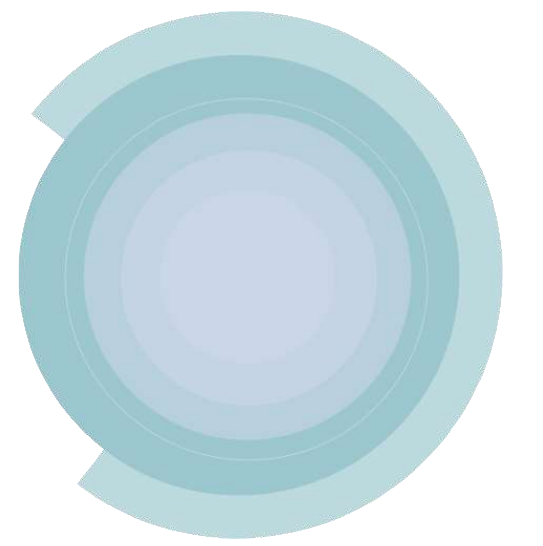


This process outlines how requirements gathered from BenefitsCal Advocate Workgroups are shared with the CalSAWS Committees for review and feedback



# Initiative Lifecycle for Public Facing Changes

The public facing system initiative lifecycle has been designed to foster Stakeholder engagement through each stage.



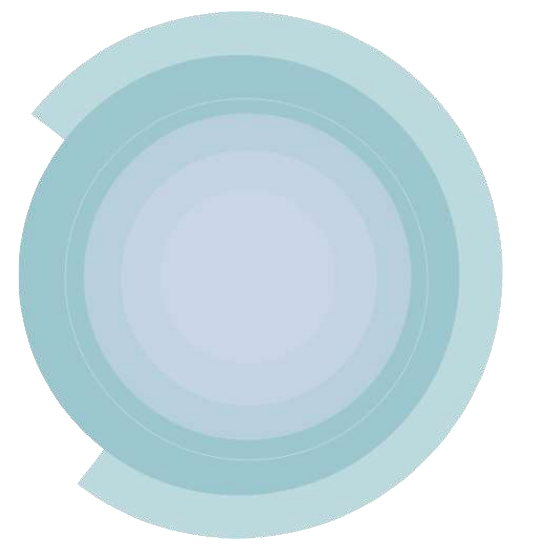
\*Enhancement recommendations stemming from BC workgroups follow this same process once identified

- Advisory Group (Counties/CWDA, CDSS, DHCS, SEIU, Advocates)
- Impacted Stakeholders (Customers, CBOs & Counties)
- Engagement Groups (State Partners, CWDA, Advocates)
- CalSAWS

# Transition Update

# BenefitsCal Transition Update

## Transition-In Timeline

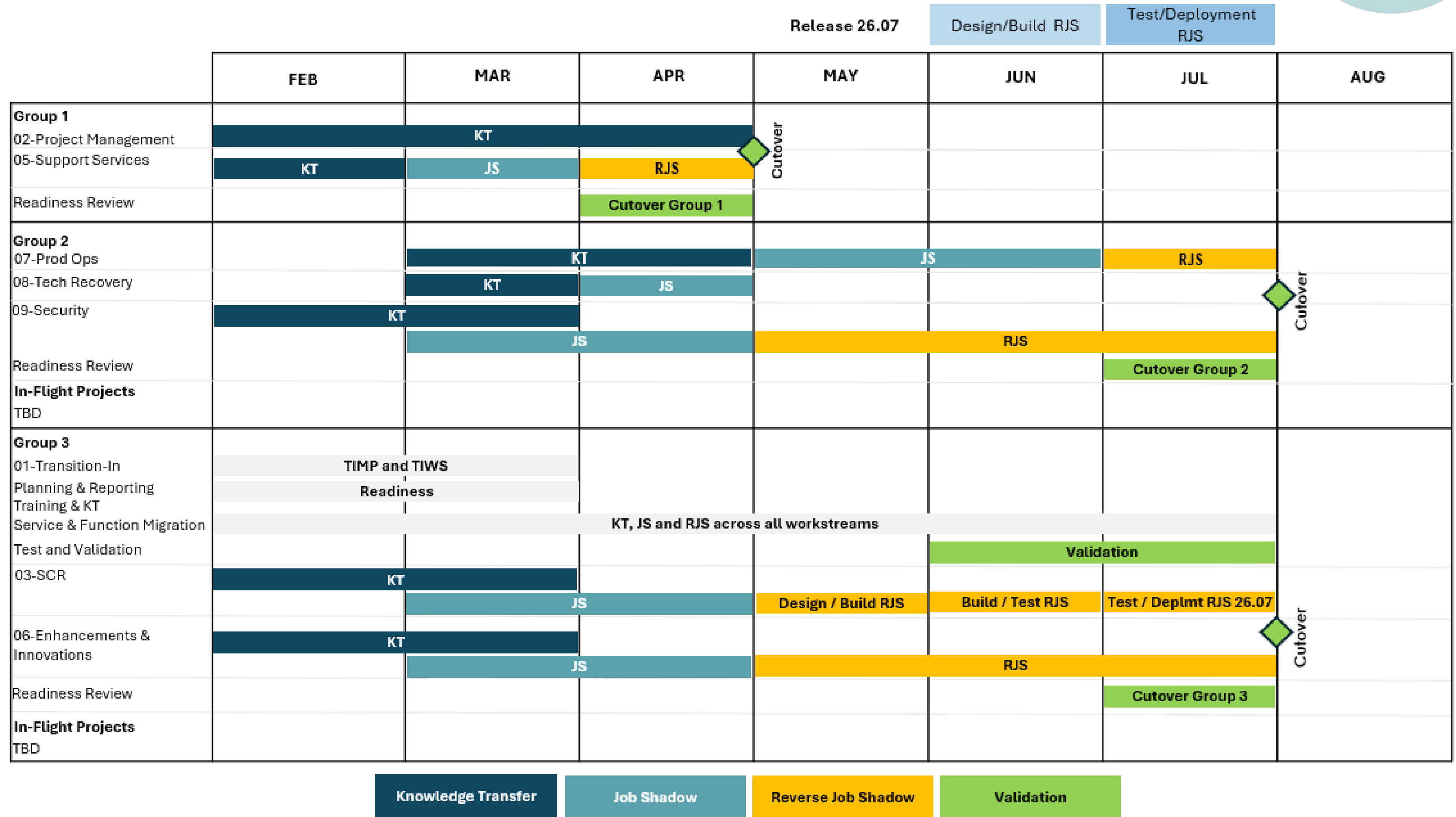


### Summary

- Completed 79% of Knowledge Transfer
- Continued Job Shadow at 10% complete

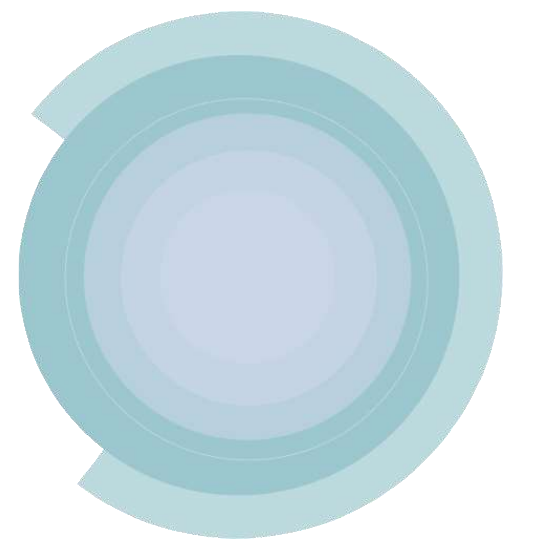
### Challenges

- Technology Enablement



# BenefitsCal Transition Update

## Dashboard Summary



### CalSAWS BenefitsCal Transition-In Dashboard

Status Date: **4/3/2026**

#### Overview

#### Completed Graphs

#### KT Sessions



**79%**  
Complete  
**79%**  
Planned Complete

**85**  
Total KT Sessions

**6**  
Due By:  
4/10/2026

Group 1  
Group 2  
Group 3

0% 20% 40% 60% 80% 100%



#### Document Requests



**119**  
Documents Completed  
**92%**  
Complete

**3**  
Overdue

**0**  
Due by:  
4/10/2026

Group 1  
Group 2  
Group 3  
Multiple Groups

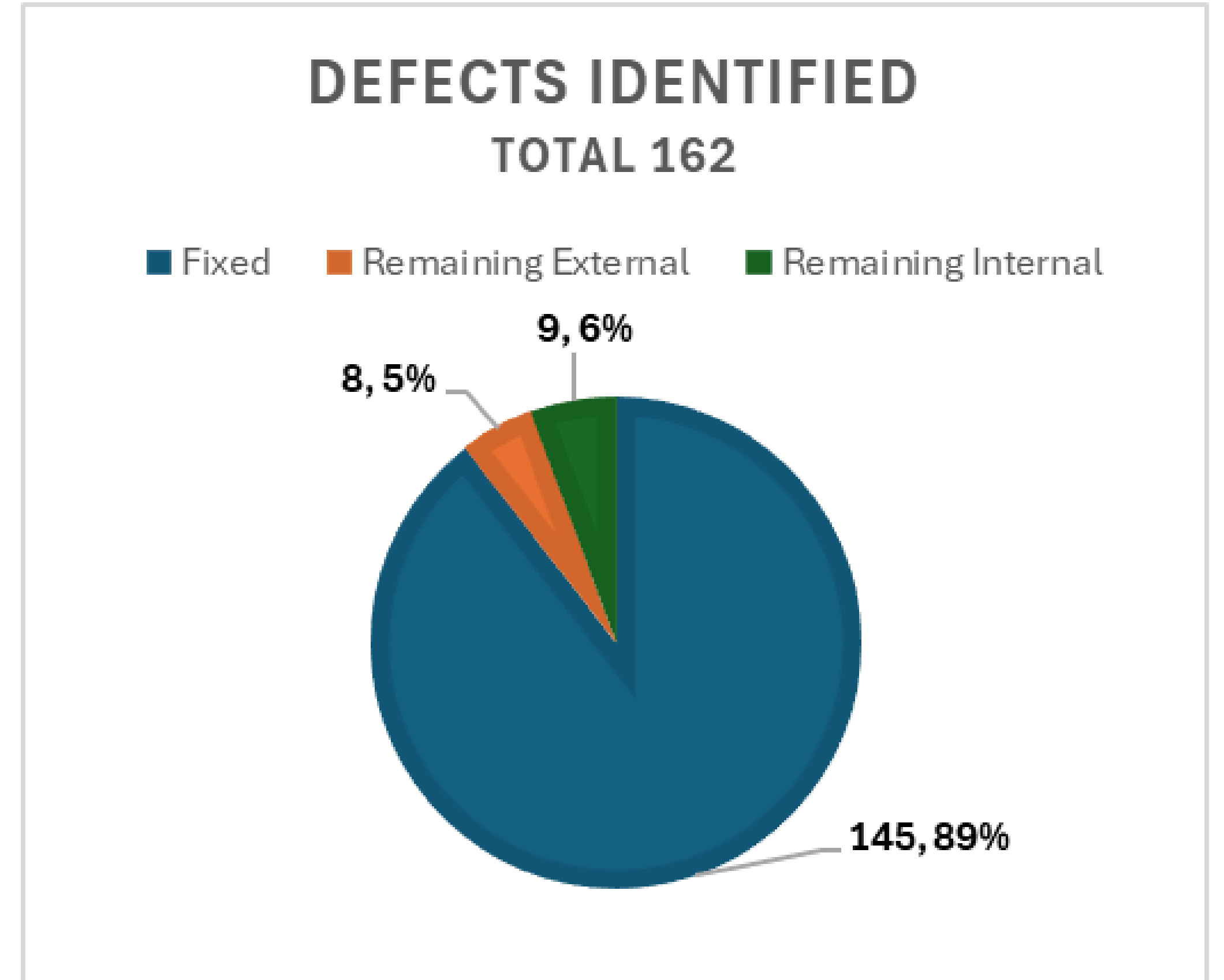
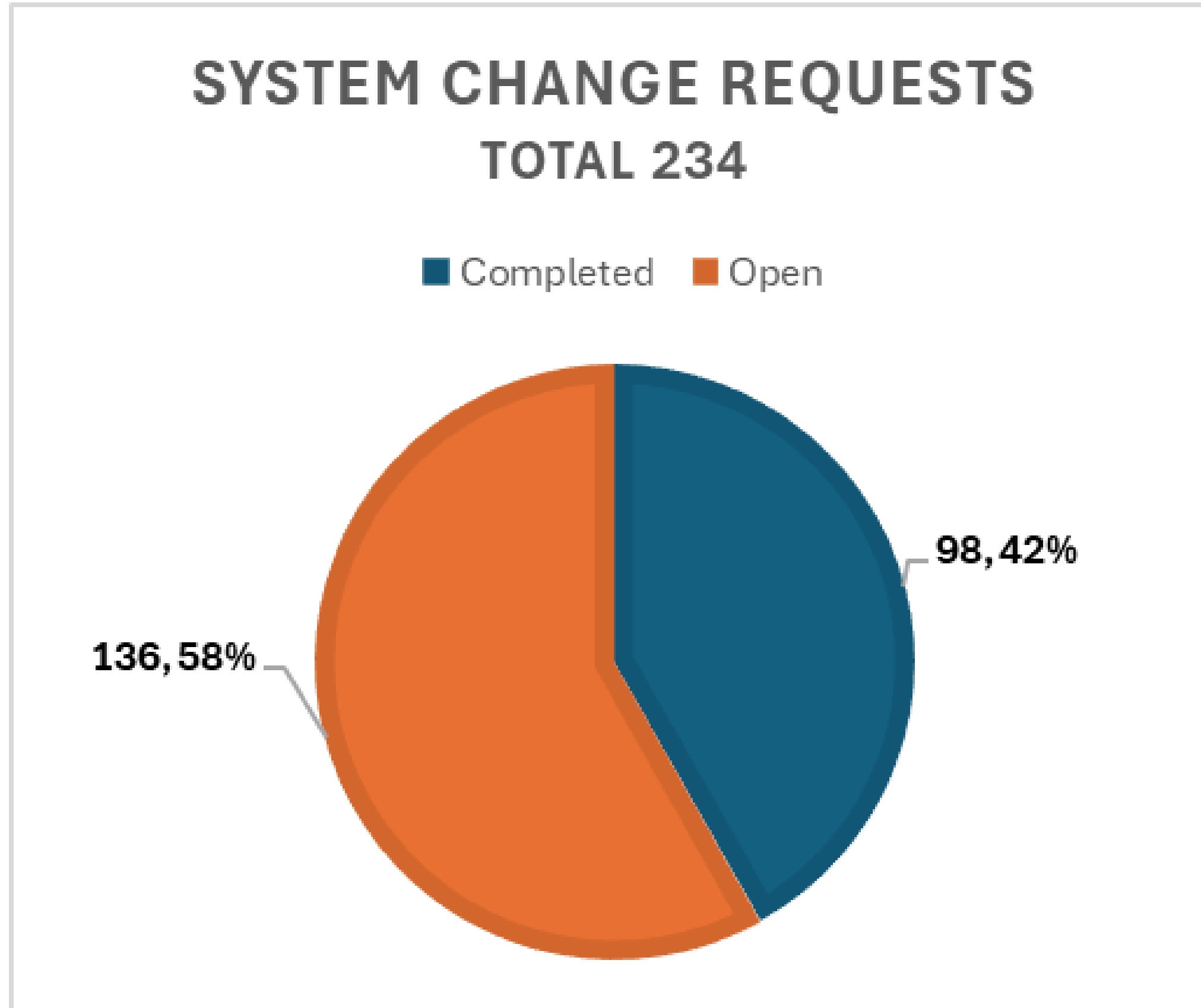
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# Contact Center Roadmap

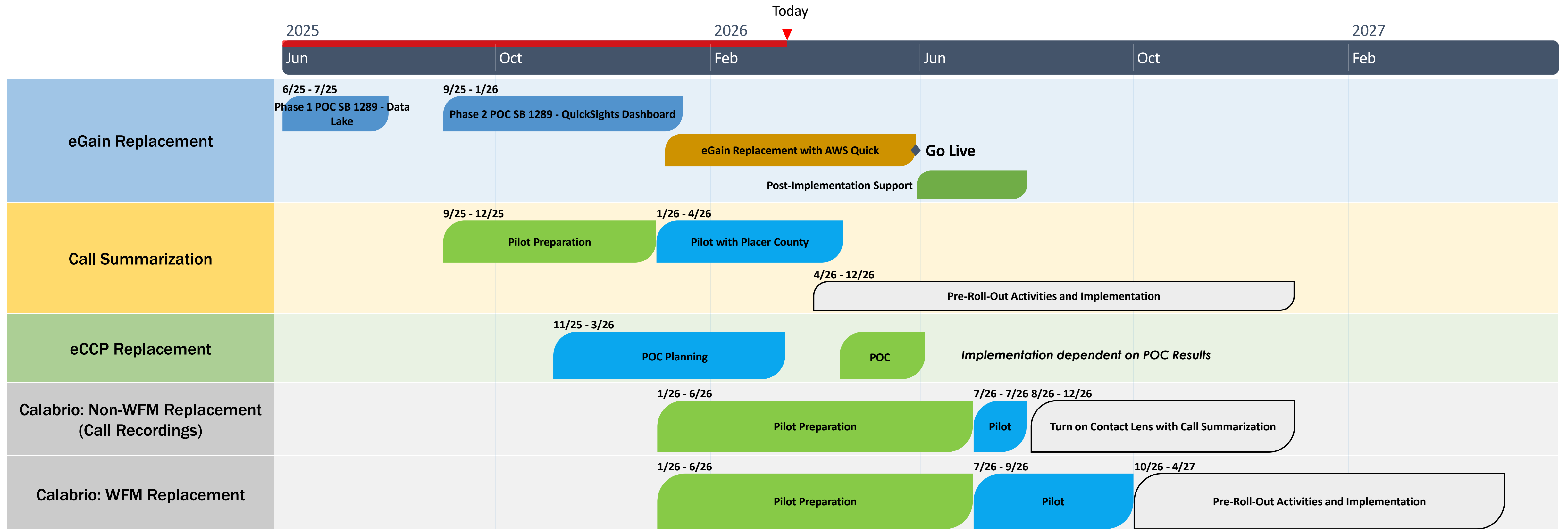
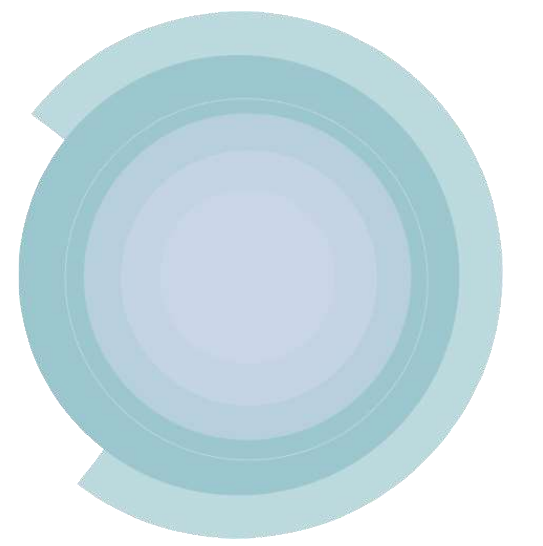
# Operational Progress

Since Transition August 1, 2025



# Contact Center Roadmap

## Overview

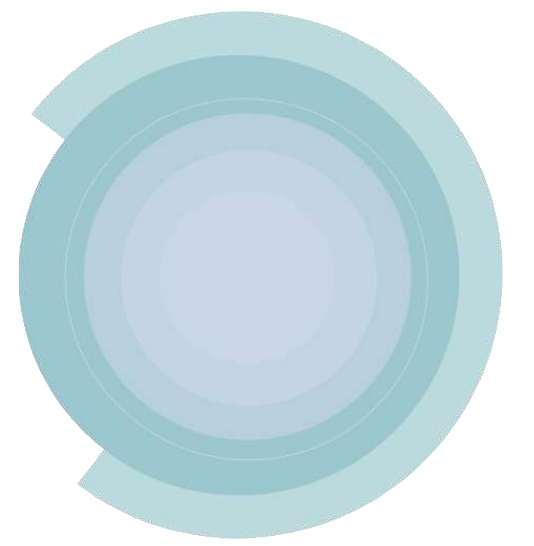


# Contact Center Roadmap

## eGain Replacement

2/26 - 6/26

eGain Replacement with AWS Quick



### Replace - Why?



- Reporting is external to the Contact Center resulting in delays in information update
- Reporting flexibility is limited
- Data inconsistencies between AWS information and eGain reports
- Dashboard displays are delayed by approximately 1 minute and 10 seconds

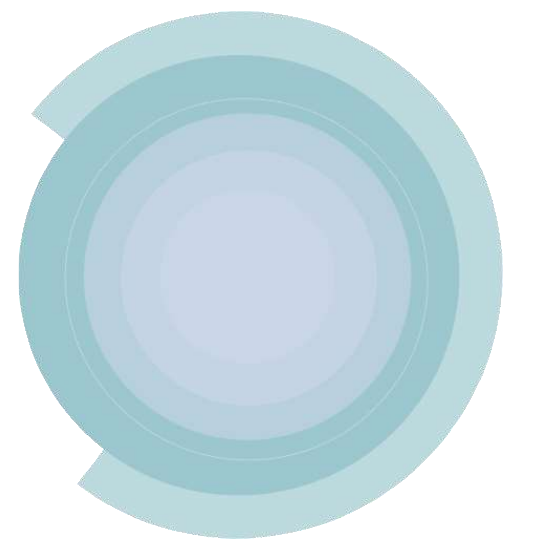
### Benefits



- AWS Data Lake is internal to the Contact Center and provides immediate updates
- AWS Quick reporting tool will be available to County staff to create reports
- Reporting data source will be the AWS Data Lake eliminating inconsistencies
- Dashboards will refresh faster (approximately 15 seconds)
- Reduced complexity and ongoing maintenance effort

# Contact Center Roadmap

## Call Summarization



### Rollout Pause - Why?



- Relies on custom prompts and orchestration, which introduces complexity, latency, and cost
- Is not configurable and scalable without significant investment in configuration changes
- Need to improve maintainability

### Benefits



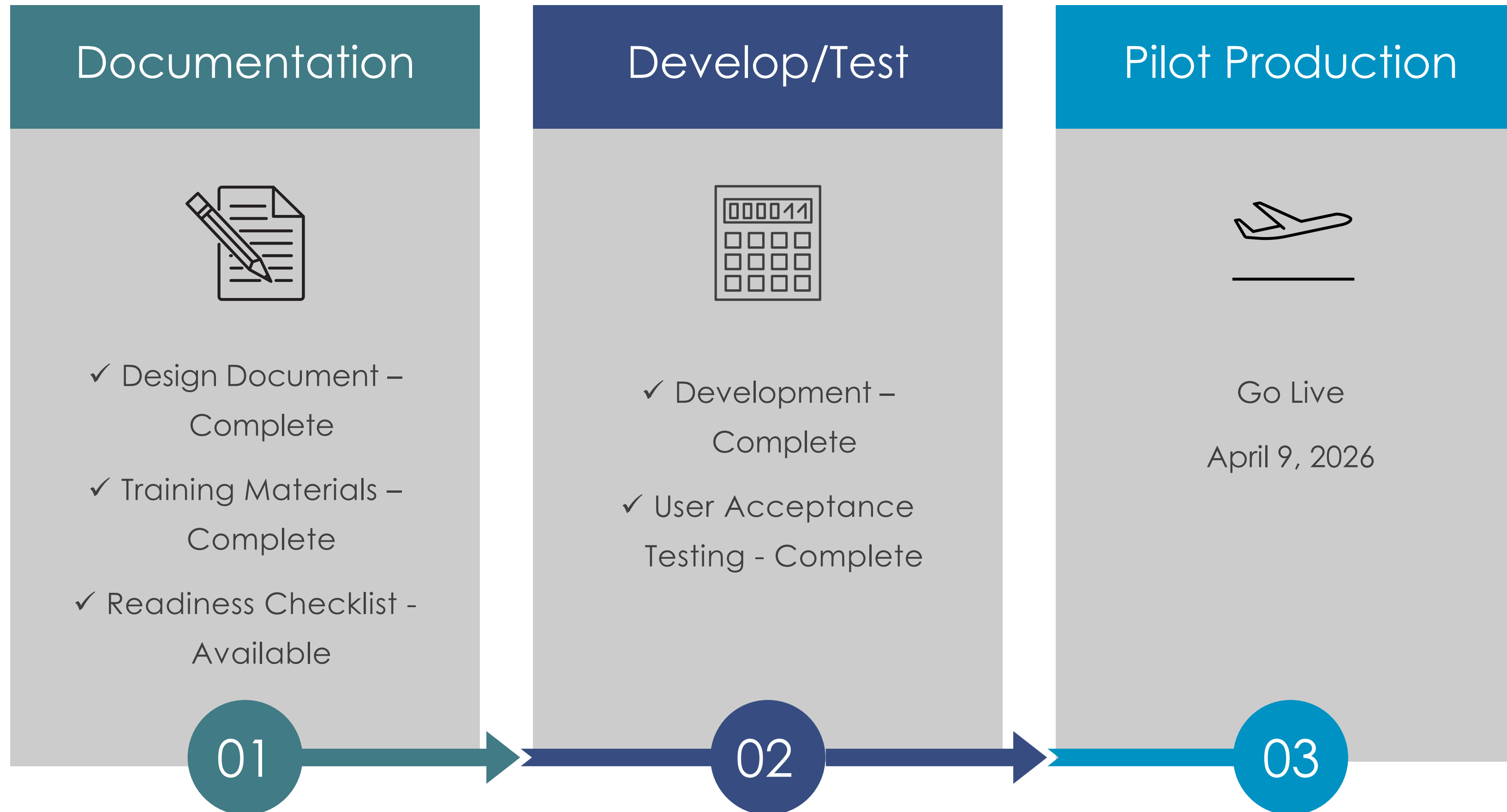
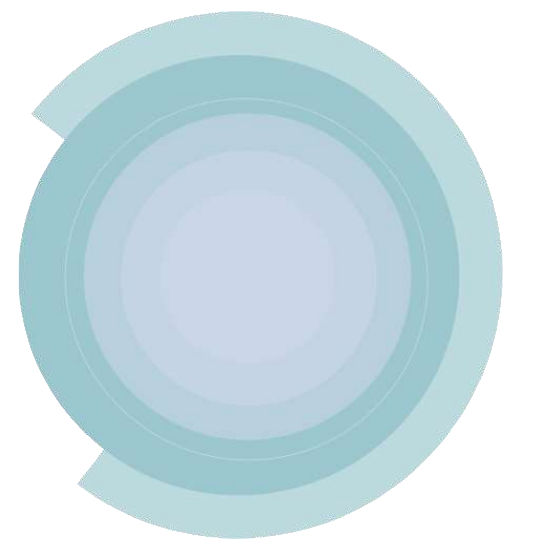
- Agent assistance with the call summarization
- Common base platform preventing the need to maintain 34 separate accounts for call summarization
- Common base AI prompts
- Configurable through the data dictionary and option choices

# Call Summarization

## Pilot Activities

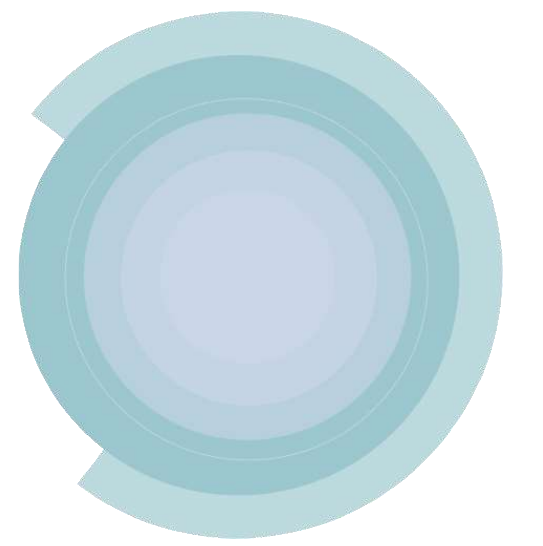
1/26 - 4/26

Pilot with Placer County

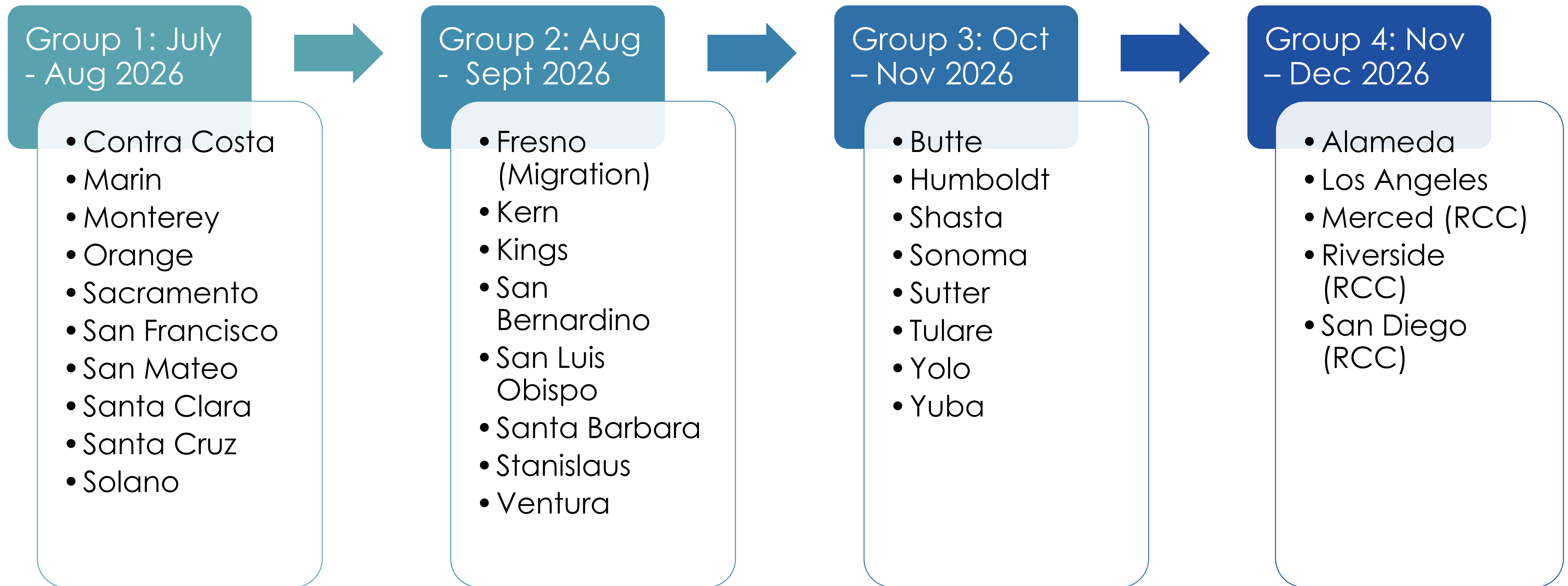


# Call Summarization

## Proposed Implementation Approach

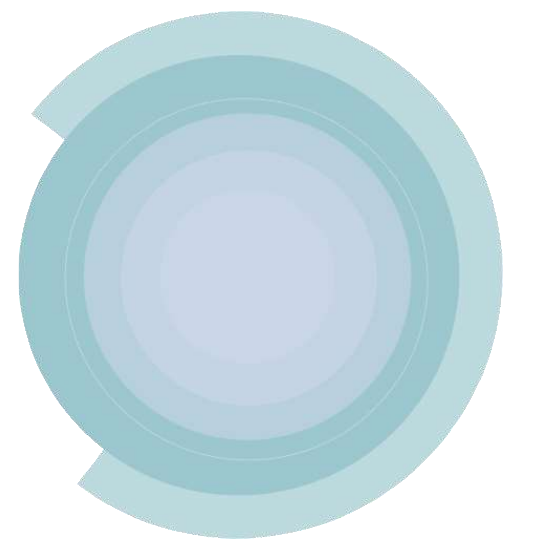


Napa Implementation of Contact Center Services will be scheduled separately  
San Joaquin (RRC) has opted out



# Contact Center Roadmap

## eCCP Replacement



### Replace - Why?



- Duplicative of native AWS functions
- Less stable than native AWS control panel
- Additional licensing and resources to maintain

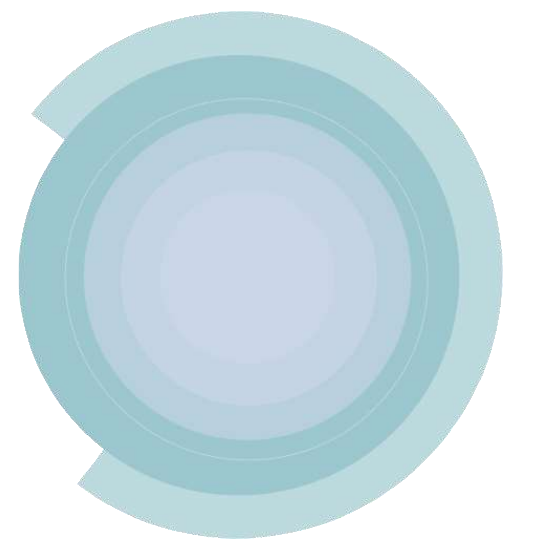
### Benefits



- Increased stability
- Reduction in software sprawl
- Easier to maintain

# Contact Center Roadmap

## Calabrio Replacement



### Replace - Why?



- Workforce management is changing in the current software
- Additional licensing cost
- Additional software integration required

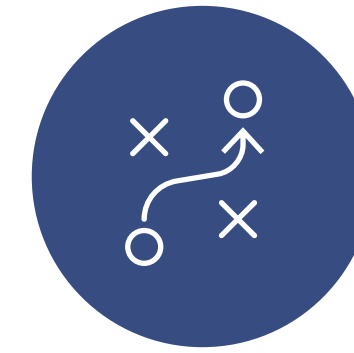
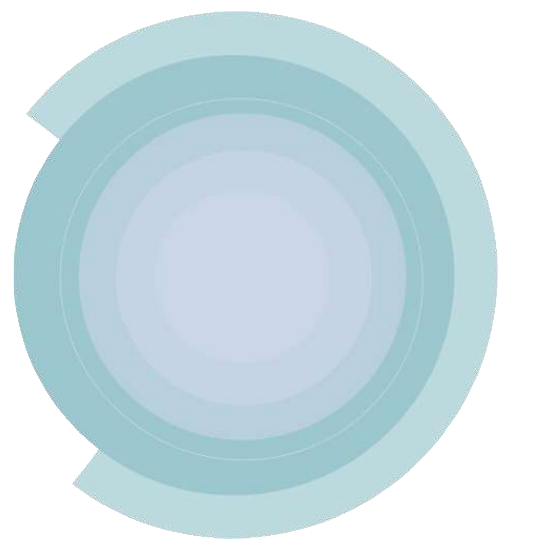
### Benefits



- Non-WFM Replacement uses Contact Lens, which is turned on during the Call Summarization rollout
- Reduction in licensing cost
- Reduced operational maintenance

# Contact Center Roadmap

And then What?



## Contact Center Disaster Recovery

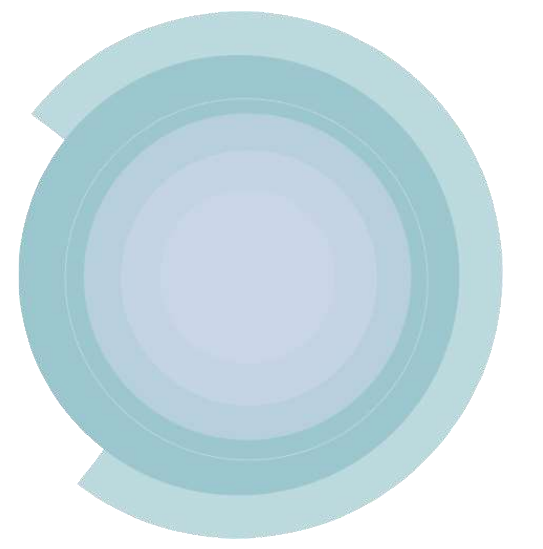
- In Discovery on the functionality available
- Out of the box does not include full functionality
- Working with AWS to determine the extent of additional custom functionality that could be made available



# 2026 CalSAWS Conference and JPA Member Representatives Meeting

# 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

### 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

### 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

#### 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

# Adjourn Meeting