

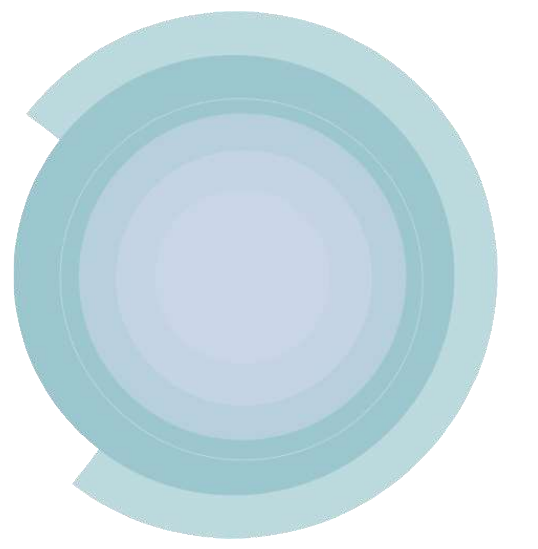
# JPA Board of Directors Meeting

May 15, 2026



CalSAWS

# Agenda



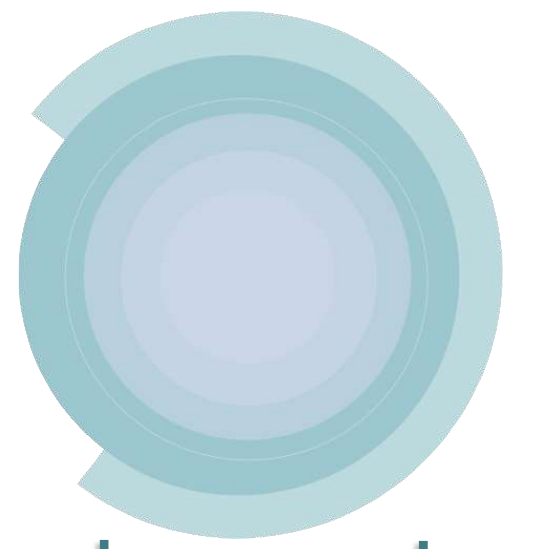
1. Call Meeting to Order.
2. Confirmation of Quorum and Agenda Review.
3. Public Comment: Public opportunity to speak on any item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

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

## CalSAWS Project Budget



In accordance with the JPA Agreement, Bylaws, and MOU, the Board must Adopt an Annual Budget

### **CalSAWS JPA Agreement – Section 2.09. Annual Budget**

The Board shall adopt an annual budget for each Fiscal Year. The Bylaws shall further provide for the presentation and content of the budget.

### **CalSAWS Bylaws, Section IX BUDGET AND FISCAL REPORT, A. Annual Budget**

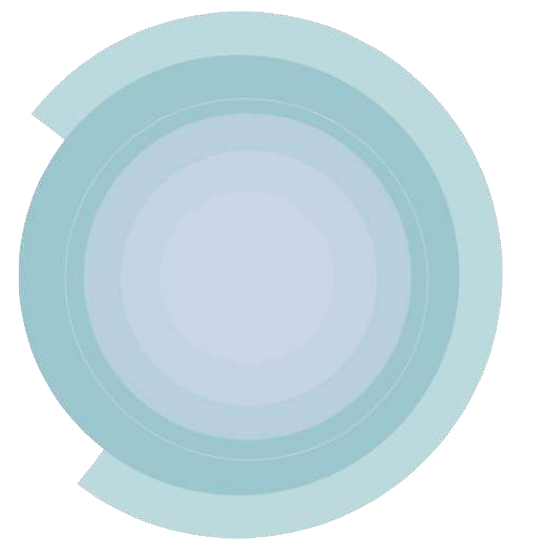
The Board shall adopt an annual budget for each Fiscal Year, which shall first be provided to each Member Representative. The Consortium Executive Director shall oversee the preparation of the Budget.

### **CalSAWS MOU, Section IV MUTUAL RESPONSIBILITIES 4.1 Fiscal Responsibilities and Claiming**

4.1.4. Administrative Costs (also known as unfunded costs) are costs properly incurred by the Consortium but designated by the State of California as ineligible for reimbursement... On or before April 1 of each year, the Consortium, with the concurrence of the Consortium's Member representatives as defined in Section 2.07 (Quorum; Required Votes; Approvals) of the JPA Agreement, will approve a schedule of Administrative Costs for the upcoming fiscal year (July 1 through June 30).

# Action Items

## CalSAWS Project Budget



The CalSAWS Annual Project Budget  
Includes all Funding Categories

**Baseline Project Funding**  
CalSAWS Operational  
Advance Planning Document  
Update (OAPDU)

**Policy Enhancements**  
Premise

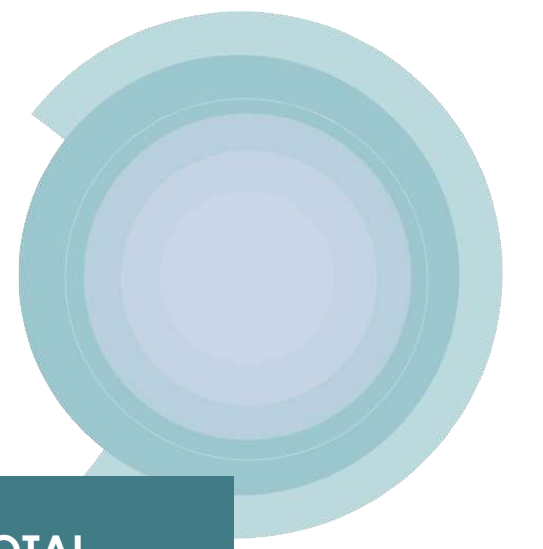


**County Purchases**

**Administrative (Unfunded)**  
Insurance, Audits, Fiscal Agent  
Services, and Accounting  
System Access (Approved by  
the General Membership  
January 30, 2025)

# Action Items

## CalSAWS Project Budget



CalSAWS Project Budget - FY 2026-27	TOTAL
CalSAWS M&O	\$351,381,514
CalSAWS - Administrative	\$799,803
CalSAWS - County Purchases	\$12,000,000
90-Day Cure Period-New CMS Guidance	\$277,939
ABAWD Form	\$1,321,354
ABAWDs Fiscal Responsibility Act of 2023 Automation	\$143,544
Accelerated Enrollment Enhancement	\$773,950
Alternate Formats in SAWS	\$1,005,500
Automated Address Updates from Additional Trusted Sources (HR 1)	\$1,168,877
Automation of CDCRs Incarceration Reporting to Counties	\$746,765
BenefitsCal Income Verification Service	\$868,128
CalFresh Eligibility Disqualifications of Certain Convicted Felons	\$1,009,700
CalFresh Enhancement to Populate Income Page (Federal Portion)	\$26,970
CalFresh Enhancement to Populate Income Page (State Portion)	\$15,000
CalFresh Minimum Nutrition Benefit Pilot Program	\$35,923
CalFresh Overissuance and Repayment Final Notice	\$524,009
CalFresh Recertification Application Revision	\$925,394
CalFresh Reimbursement Due to Electronic Theft	\$617,550
CalFresh Repayment Agreement Revisions	\$463,232
CalFresh Restaurant Meals Program Notice-Eligibility Clarification	\$59,016
CalFresh SUA Standardization	\$3,565
CalHEERS Portal Updates for Single Streamlined Application Changes	\$1,800,239
Cal-Learn Pregnancy or Parenting (SB 521)	\$52,569
CalSAWS Auditor Access Profile	\$46,250
CalSAWS Interface	\$5,582,558
CalWORKs Child Support Notice of Action	\$1,881,422
CalWORKs Domestic Violence (AB 969)	\$1,738,000
CalWORKs Homeless Assistance Income Calculation (SB 1415)	\$282,538
CFAP Expansion Automation Reappropriation Authority	\$24,248,347
Child Health and Disability Prevention Program (CHDP)	\$1,235,121
DHCS Report Support	\$257,172

CalSAWS Project Budget - FY 2026-27	TOTAL
Disparities Reduction Act (AB 1163)	\$2,134,591
Elimination of Comparable Disqualification Automation	\$123,000
Extension of CalFresh Water Pilot	\$112,260
Fiscal Responsibility Act Data Collection Options	\$873,236
HOPE Trust Accounts (SB 242)	\$97,750
H.R. 1 ABAWD Impacts	\$2,683,664
H.R. 1 Automation (One Big Beautiful Bill Act)	\$3,375,530
H.R. 1 Medi-Cal Impacts - Automation	\$10,070,126
Income and Resource Exclusions (AB 42)	\$350,750
Infant Supplement Grant CNI Increase (AB 349)	\$106,553
Integration of the Work Number	\$387,100
Medi-Cal Call Center Data	\$189,973
Medi-Cal Expansion Freeze for Adults 19 and Older without SIS	\$355,315
Medicare Part A Buy In (SB 311)	\$816,500
Middle Eastern and North African Inclusion Act (AB 91)	\$926,864
Monthly Premiums for UIS Population	\$1,995,802
National Accuracy Clearinghouse (NAC) Automation	\$8,185,522
New Aid Code for TANF Timed-Out 2P Families	\$454,627
Post-Eligibility Treatment of Income	\$513,258
Property Insert (for MC 210RV/217 RE Packets)	\$20,728
Refugee Cash Assistance Eligibility Change	\$27,522
Reinstatement of Asset Limit Test for Non-MAGI Medi-Cal	\$910,650
Release of Information to CBOs	\$3,204,945
Request for Production Simulation Environment to Support FCED API Testing	\$254,722
Return Mail Processing (Remaining Counties to Opt into Automatic RMP)	\$540,000
SAR 2 Reporting Changes Notice	\$849,695
SAWS Shared Application Forms Revisions	\$3,213,761
SB 1341 Automation	\$4,980,700
SNAP E&T Compliance with Final Rule	\$84,700
Tiered Rate Structure (Foster Care Rate Reform)	\$5,601,663
Transforming CalWORKs Initiative	\$9,575,669

**Total** **\$474,309,125**

**Revenues**

**Intergovernmental** **\$474,309,125**

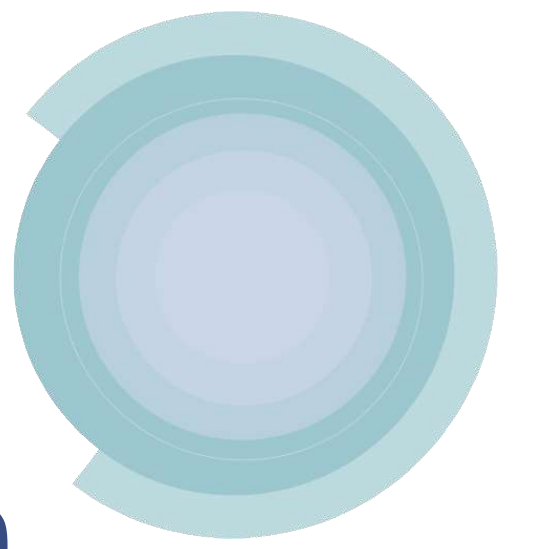
**Expenditures**

**\$474,309,125**

Service and supplies \$339,726,437

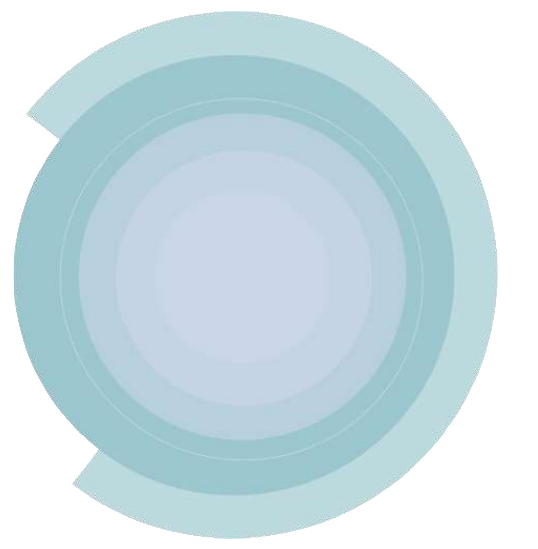
Capital outlay \$134,582,688

# Action Items



4. Approval of SFY 2026/27 CalSAWS Project Budget which includes the CalSAWS Operational Advance Planning Document (APD) Update, County Purchases, Premise Item Funding, and the Administrative Budget for Unfunded costs.

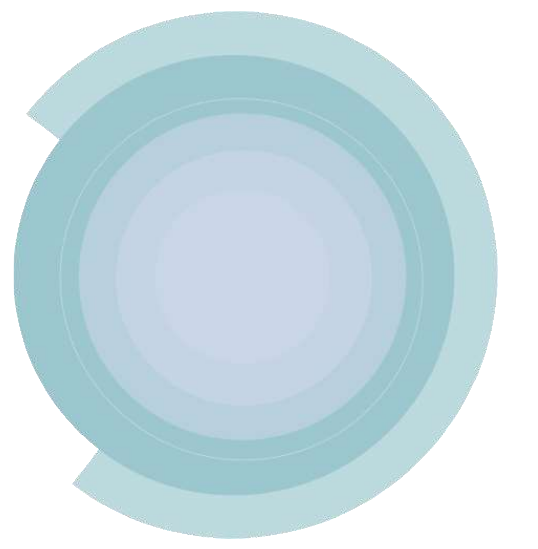
# Action Items



## 5. Approval of Consent Items:

- a. Approval of the Minutes and review of the Action Items from the April 10, 2026, meeting of the JPA Board of Directors.
- b. Approval of FCED Governance member, Gilbert Ramos.
- c. Approval of Memorandum of Understanding (MOU) between CalSAWS and California Department of Corrections and Rehabilitation (CDCR)/California Correctional Health Care Services (CCHCS) for the exchange of client data to support Transitional Case Management Program (TCMP).
- d. Approval of ClearBest Change Order 10, which includes additional QA Professional Services Change Allowance and optional three (3) 1-month extensions.

# Action Items



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

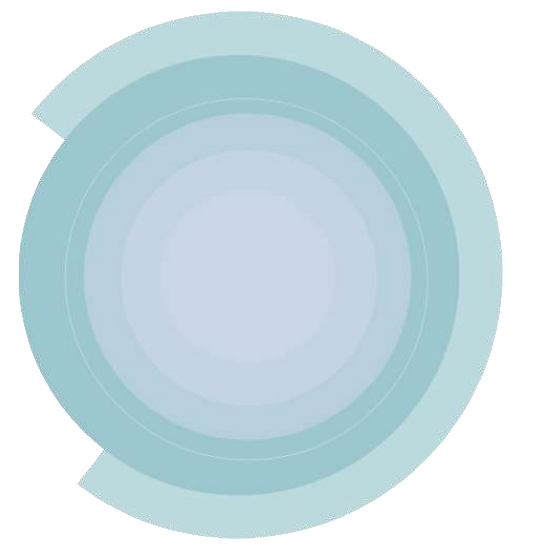
- e. Approval of Deloitte Portal Mobile Amendment 2, which includes 2-month extension of agreement for transition and optional two (2) 1-month extensions.
- f. Approval of Deloitte Portal Mobile Work Order 23, which includes additional software renewals and transition scope.
- g. Approval of Deloitte M&E Change Order 9, which includes one (1) county purchase
- h. Approval of Kronick, Moskovitz, Tiedemann & Girard Legal Services Amendment 2, which includes a 2-year extension of agreement for legal services and optional four (4) 1-year extensions.

# Informational Items

# CalSAWS Project Risks Overview

# Risk, Issues, and Watch Items

## Definitions



### Watch Item

Concerns or potential risks that 1) lack definition or maturity, 2) do not have assigned likelihood or consequences, and 3) require additional monitoring or action by the project and/or county.

← Monitoring →

Monitor / Track

### Risk

An uncertain future event or condition that, **if it occurs**, could have a positive or negative effect on one or more project objectives (i.e., scope, schedule, cost, or quality).

High

Medium

Low

Mitigate / Accept / Contingency Plan

### Issue

A current condition, situation, or problem that 1) has already occurred, 2) is actively impacting project objectives (cost, time, scope, or quality), and 3) requires immediate action.

Critical

High

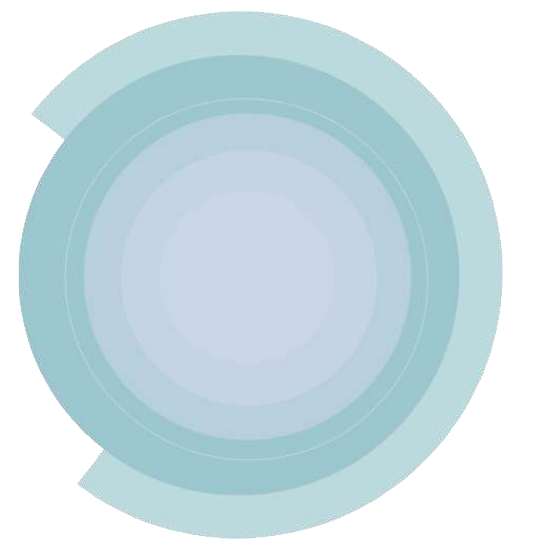
Medium

Low

Resolve

# Risk and Issue Levels

## Calculations and Levels



### Risks

(Analytical and Mitigation-focused)

**Risk Level/Exposure = (Probability × Impact)**

**Probability:** Likelihood of the risk occurring (10% - 90%)

**Impact:** Effect on schedule, scope, budget/resources, and/or quality if risk happens (1 – Minimal to 5 – Unacceptable)

Probability	Impact				
	1 Minimal	2	3	4	5 Unacceptable
90% Near Certainty	(0.9)	(1.8)	(2.7)	(3.6)	(4.5)
70% Highly Likely	(0.7)	(1.4)	(2.1)	(2.8)	(3.5)
50% Possible	(0.5)	(1.0)	(1.5)	(2.0)	(2.5)
30% Unlikely	(0.3)	(0.6)	(0.9)	(1.2)	(1.5)
10% Highly Unlikely	(0.1)	(0.2)	(0.3)	(0.4)	(0.5)

Legend

**Low**  
(0.1 - 0.7)

**Medium**  
(0.8 - 2.1)

**High**  
(2.2 - 4.5)

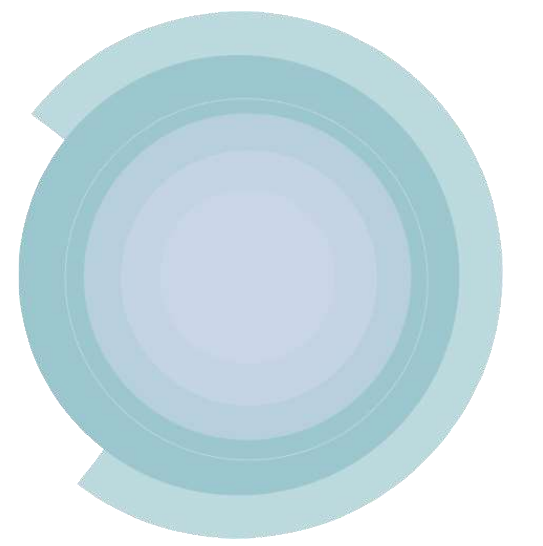
### Issues

(Resolution focused)

Priorities	Description
<b>Critical</b>	Unacceptable impact to the Project.
<b>High</b>	Major slip in major milestone or critical path impacted.
<b>Medium</b>	Minor slip in major milestone with no critical path impacted.
<b>Low</b>	Minimal impact or minor Project adjustment needed.

# CalSAWS Open Risks and Issues

## Project Management, Infrastructure, and M&E Risks

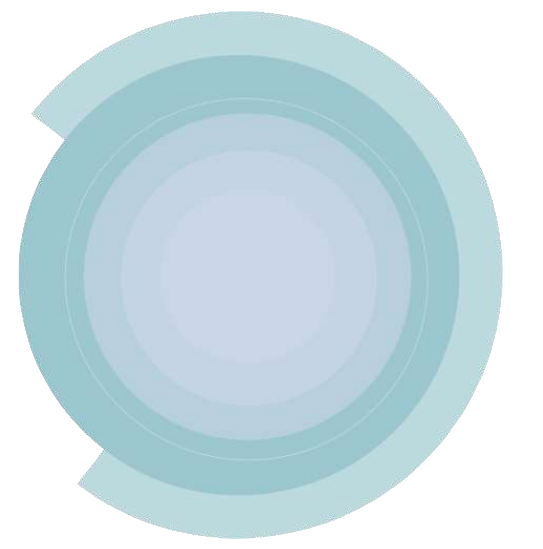


Project Management Risks			
Risk	Risk Name	Risk Level	Agenda Item
102	Lack of annual project funding may cause schedule delay or reduction in scope for CalSAWS & other projects	High	7. Quarterly PMO Update

Infrastructure and M&E Risks			
Risk	Risk Name	Risk Level	Agenda Item
324	CARES - Delay in communication may impact CalSAWS participation in the Production Simulation activity prior to the go-live.	Medium	16. Policy & Release Update
326	Lack of timely policy guidance may impact Medi-Cal HR1 delivery schedule	Medium	9. HR-1 Workgroups Update
332	Limited County Review Capacity May Impact Analytics Modernization Delivery Schedule	Low	11. Data & Analytics Update
333	Inclusion of CMS Verify Lawful Presence(VLP) service in 26.09 may impact ability to implement Medi-Cal eligibility system changes	Medium	9. HR-1 Workgroups Update
334	Lack of transmitting Foster Care Vendor information to CalSAWS increases county vendor maintenance	Medium	16. Policy & Release Update
336	Move of Database Servers to Oracle Databases@AWS may result in user impact	Medium	13. Overview of Oracle Infrastructure Update
338	Replacement of Identify Access Management Solution may result in user access issues	Medium	12. Identity Access Management (IAM) Update

# CalSAWS Open Risks and Issues

## Transition Risks and Project Issues



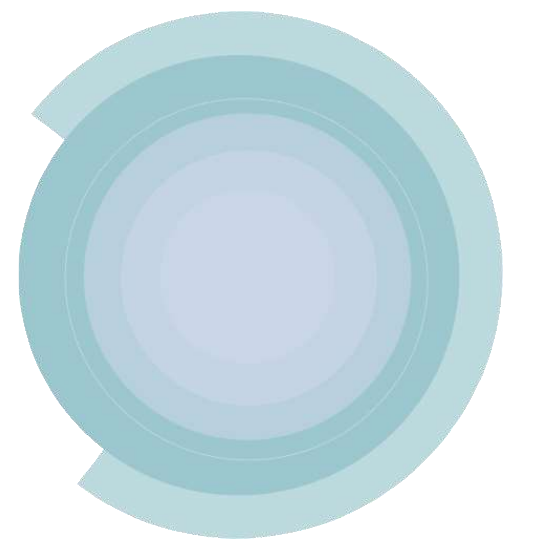
Transition Risks			
Risk	Risk Name	Risk Level	Agenda Item
327	Limited Availability of Deloitte Staff May Impact the BenefitsCal Transition Schedule	Medium	Appendix A - Transition
328	Lack of Availability of Deloitte Offshore Resources May Impact Transition of Development KT/JS Activities	Low	Appendix A - Transition
329	Delay in Providing Accenture Team Timely Access May Impact BenefitsCal Transition Activities	Medium	Appendix A - Transition
330	Current BenefitsCal System Performance May Not Meet the New SLA Performance Standards Set In The New Contract	Low	Appendix A - Transition

Issues			
Issue	Issue Name	Priority	Agenda Item
335	Schedule Delay In BenefitsCal SCR Job Shadow Workstream	Medium	Appendix A - Transition

# Quarterly PMO Update

# PMO Update

## CalSAWS Financial Update



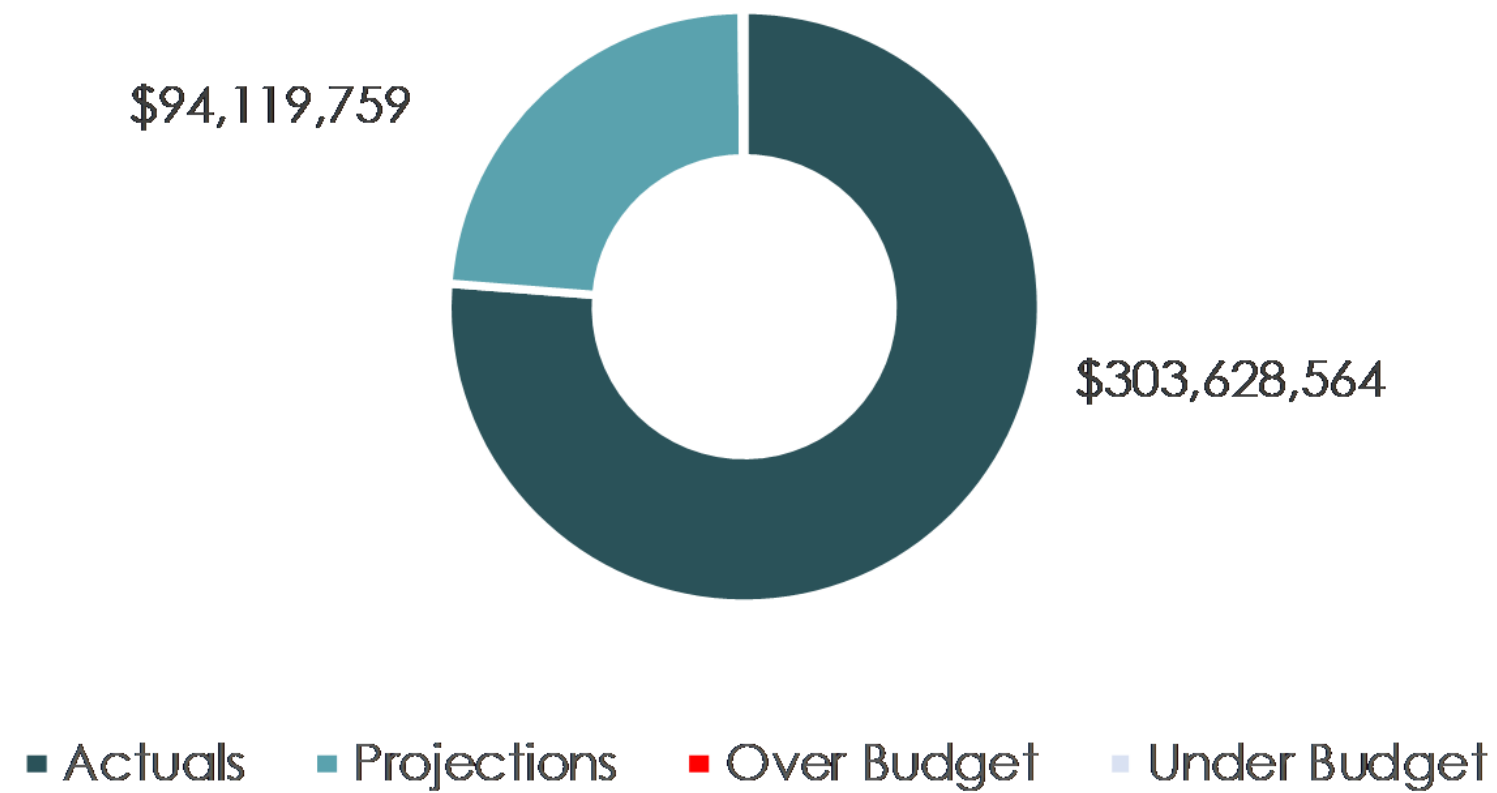
CalSAWS M&O

Premise

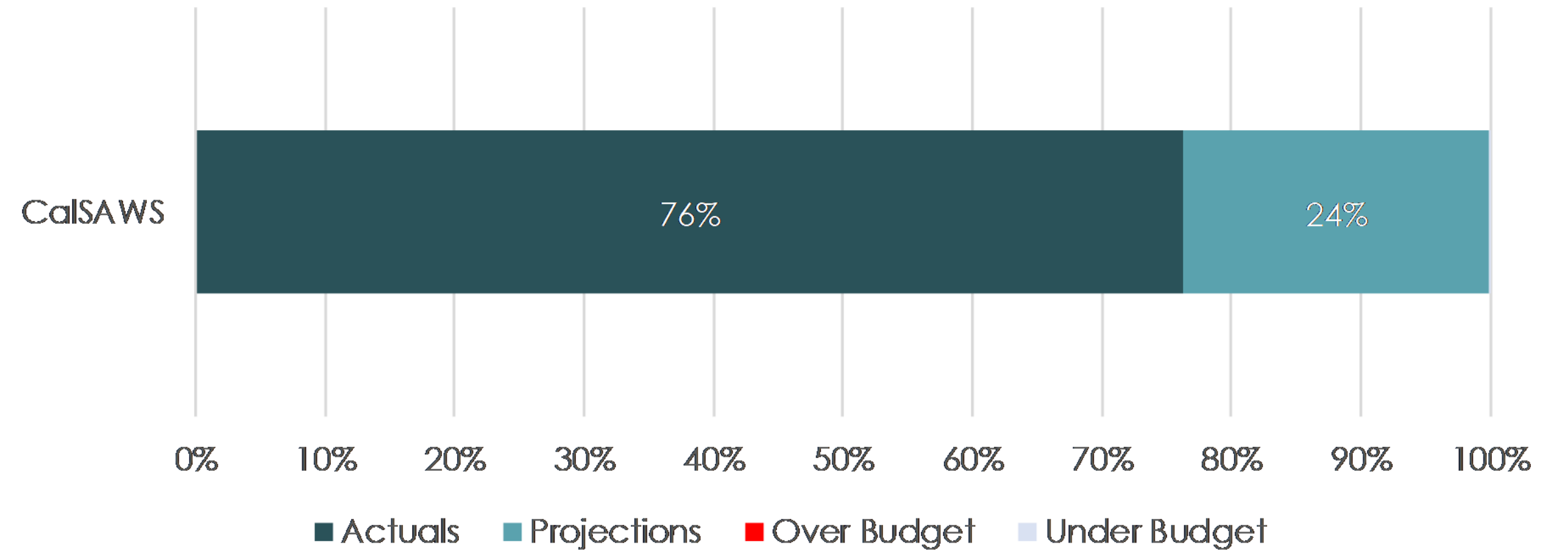
JPA Admin

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

Total Actuals & Projections

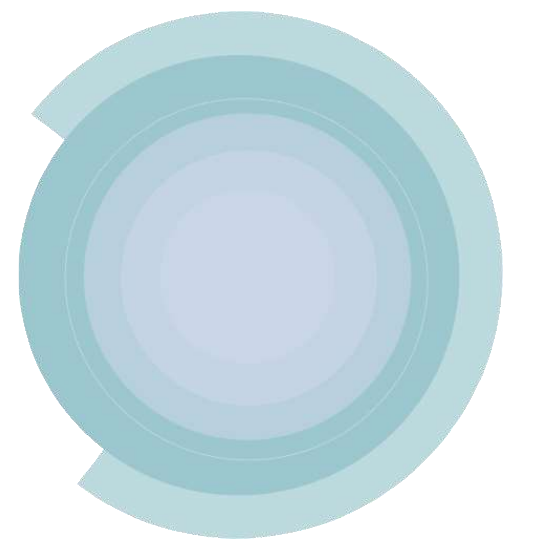


% Expended to Date



Category	Actuals to Date <sup>1</sup>	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
<b>CalSAWS</b>	<b>\$280,408,984</b>	<b>\$84,136,443</b>	<b>\$364,545,427</b>	<b>\$364,545,427</b>	<b>\$0</b>	<b>76.9%</b>	<b>100.0%</b>	
CalSAWS M&O	\$277,090,511	\$82,947,128	\$360,037,639	\$360,037,639	\$0	77.0%	100.0%	
OCAT M&O	\$418,578	\$189,095	\$607,673	\$607,673	\$0	68.9%	100.0%	
CalHEERS Interface	\$2,219,135	\$1,000,220	\$3,219,355	\$3,219,355	\$0	68.9%	100.0%	
Covered CA CSC	\$680,760	\$0	\$680,760	\$680,760	\$0	100.0%	100.0%	
<b>CalSAWS Premise</b>	<b>\$22,705,580</b>	<b>\$9,710,849</b>	<b>\$32,416,429</b>	<b>\$32,882,461</b>	<b>\$466,032</b>	<b>69.1%</b>	<b>98.6%</b>	
CalSAWS Premise	\$22,705,580	\$9,710,849	\$32,416,429	\$32,882,461	\$466,032	69.1%	98.6%	Actuals lower than planned
<b>JPA Admin. Budget</b>	<b>\$514,000</b>	<b>\$272,467</b>	<b>\$786,467</b>	<b>\$786,467</b>	<b>\$0</b>	<b>65.4%</b>	<b>100.0%</b>	
CalSAWS 58 Counties	\$514,000	\$272,467	\$786,467	\$786,467	\$0	65.4%	100.0%	
<b>Total</b>	<b>\$303,628,564</b>	<b>\$94,119,759</b>	<b>\$397,748,323</b>	<b>\$398,214,355</b>	<b>\$466,032</b>	<b>76.2%</b>	<b>99.9%</b>	

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



### RISK 102 - LACK OF ANNUAL PROJECT FUNDING MAY CAUSE SCHEDULE DELAY OR REDUCTION IN SCOPE FOR CALSAWS & OTHER PROJECTS

#### Description

The project is subject to state funding approval each year. State general fund payments may be deferred, or budget cuts may cause schedule delays, scope reductions, or staff reductions.

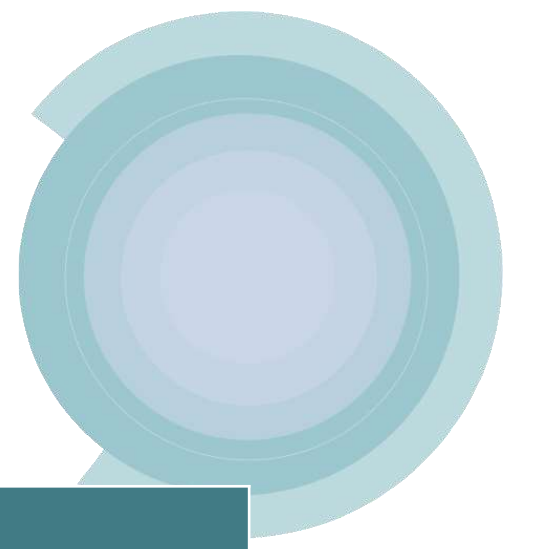
#### Mitigation Plan

Consortium PMO will monitor actual and projected costs against plan to assess utilization and monitor new funding needs for future funding requests as part of standard processes and apply updates per State schedule.

Level: High - Probability: 70% - Impact: 5 - Exposure 3.5

# PMO Update

## Procurements



### Legal Services

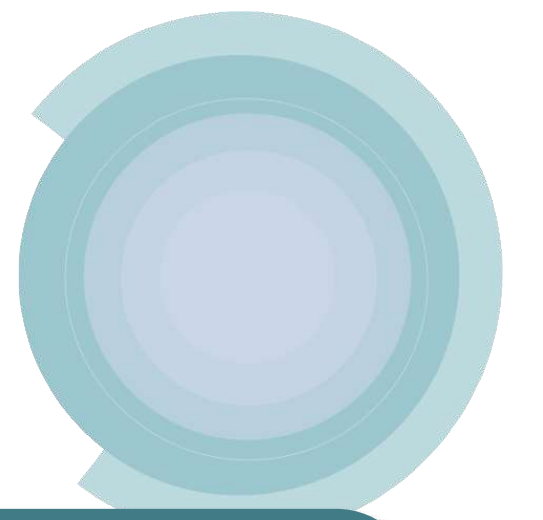
Legal Services Procurement Event	Dates
Cancellation issued on April 20, 2026	

### QA Services

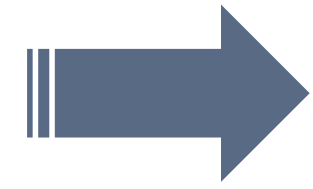
QA Services Procurement Event	Dates	
1	Release RFP	August 11, 2025
2	Conduct Bidder's Conference	August 19, 2025
3	Bidder Question and Answer Period	August 11 – September 2, 2025
4	Consortium Publishes Final Q&A and RFP Addendum	September 16, 2025
5	Proposals Due	October 20, 2025
6	<b>Evaluate Compliance,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

# PMO Update

## CalSAWS Annual Audit Findings



The annual financial audit is conducted in accordance with the JPA Agreement




**Section 2.10. Annual Operational and Fiscal Reports.** The Board shall cause an annual operational report and annual fiscal report to be prepared and provided to each Member Representative.

Independent auditors are selected through a procurement process.  
The Independent Financial Auditor:



Reviews financial statements prepared by the Fiscal Agent




Conducts field work/site visits



Reviews sample assets and financial artifacts



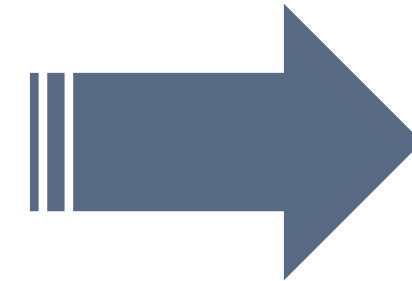
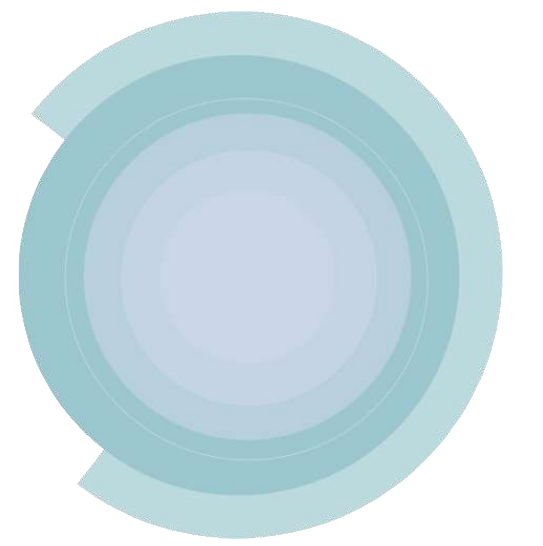
Interviews Project Staff and Board Chair



Submits two deliverables:  
(1) Audit Report  
(2) Single Audit Report

# PMO Update

## CalSAWS Annual Audit Findings



Audited CalSAWS Year Ending  
June 2025 Single Audit Report  
and Financial Statements

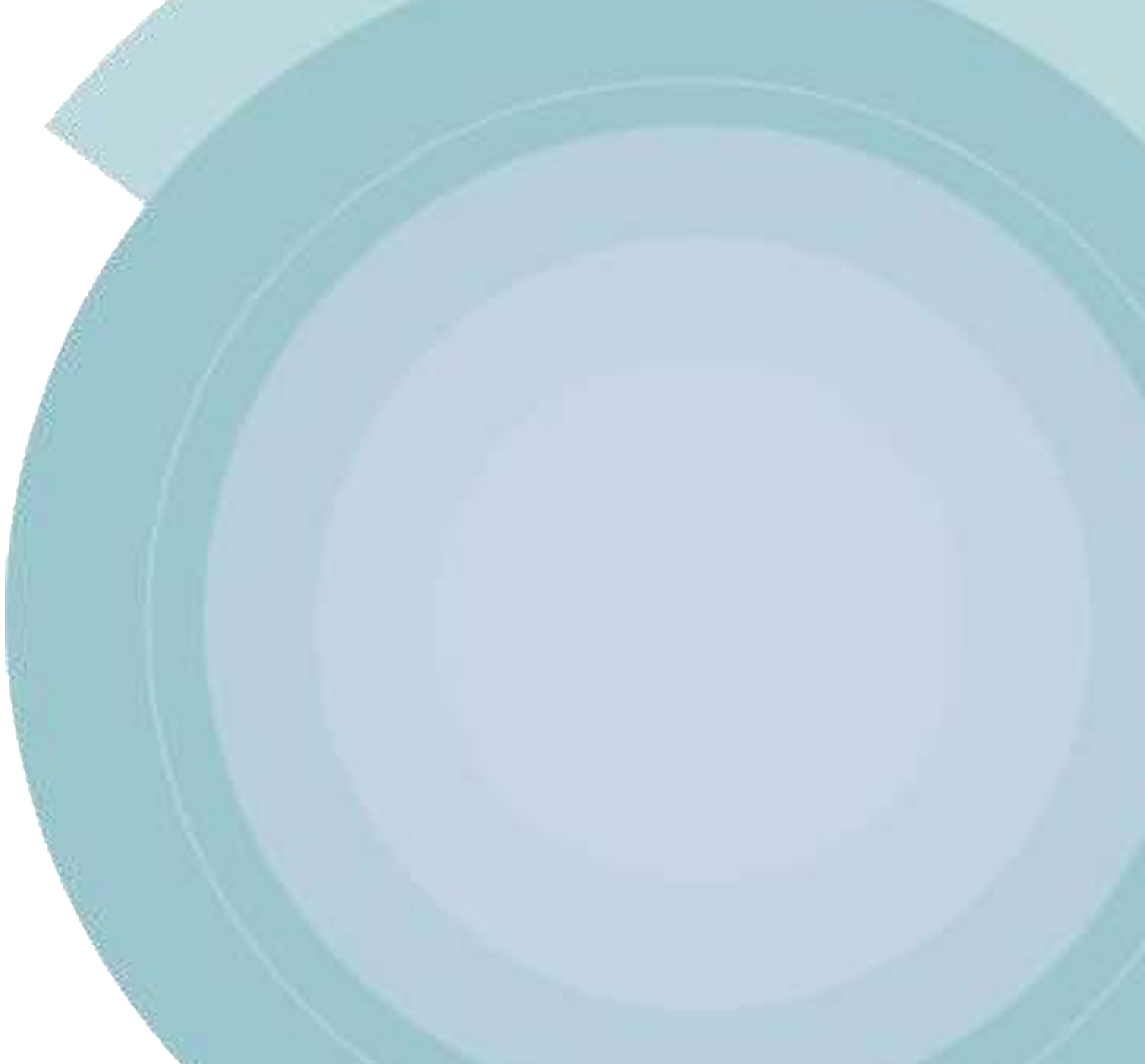
### Results

There were **no audit findings**, and the auditors found **no instances of non-compliance** which could have had a direct and material effect on our financial statement amounts.

The auditors further found that the financial statements “**present fairly**, in all material respects, the respective financial position of the governmental activities and the general fund,” of the Consortium. **The auditors made no recommendations.**

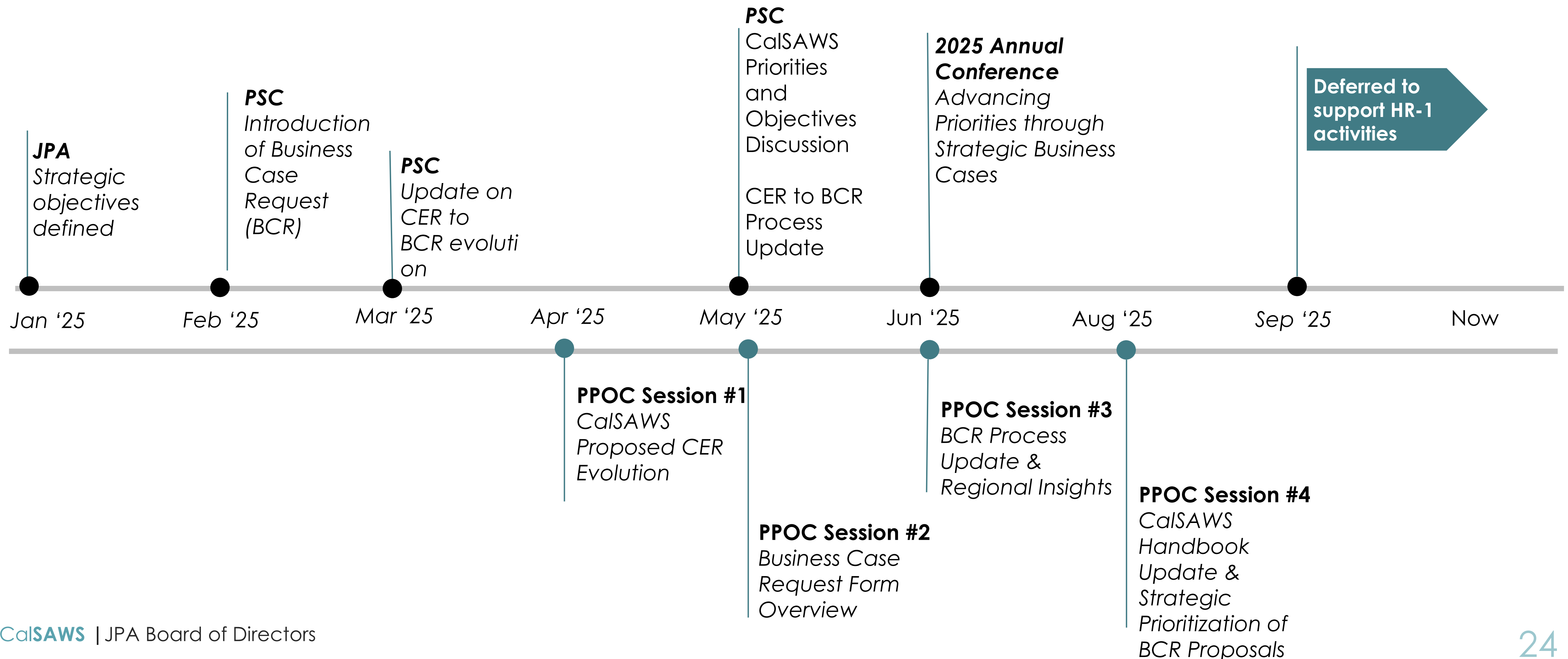
These documents were distributed via CIT 0067-26 and are available on the CalSAWS website ([www.calsaws.org](http://www.calsaws.org) / public information)

# CalSAWS Priorities



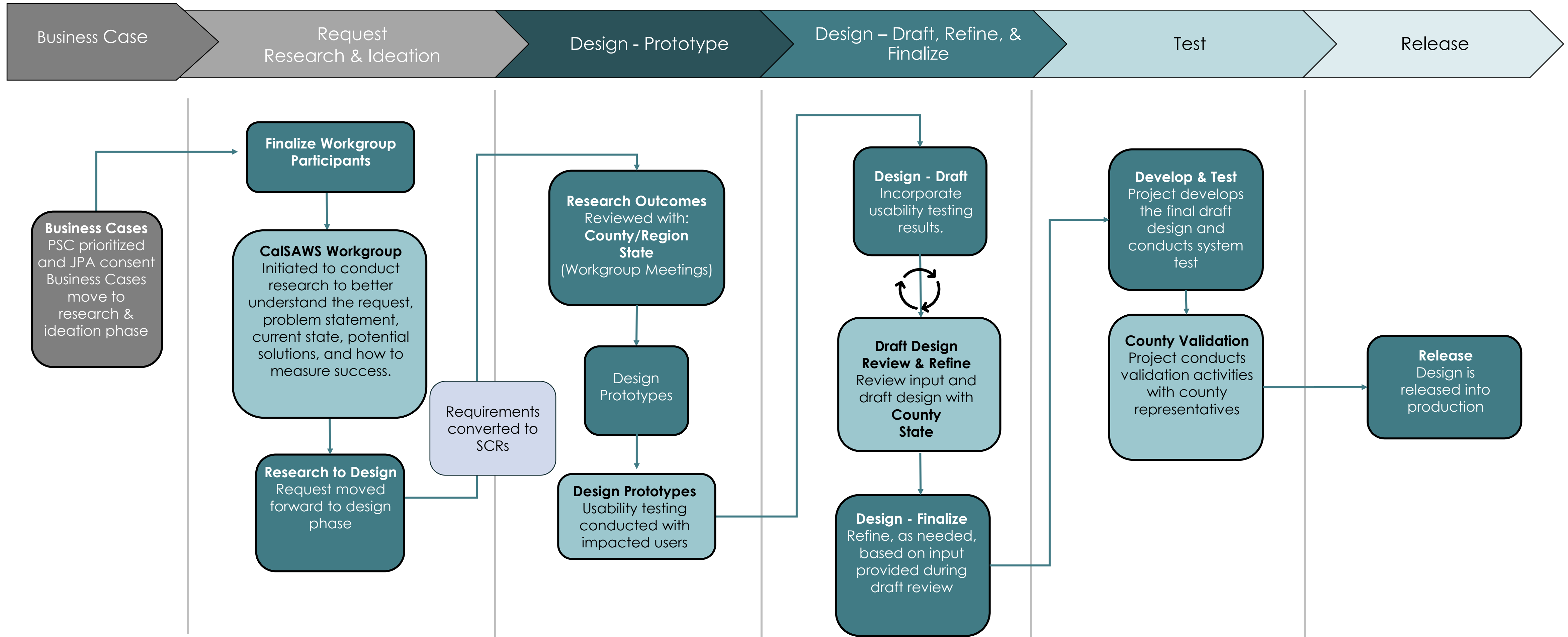
# Change Prioritization Roadmap/Timeline

Several **targeted actions were taken last year starting Mar 2025** to evolve the regional process to ensure better alignment and transparency, while also enabling CalSAWS to be more responsive to the collective needs of the counties.



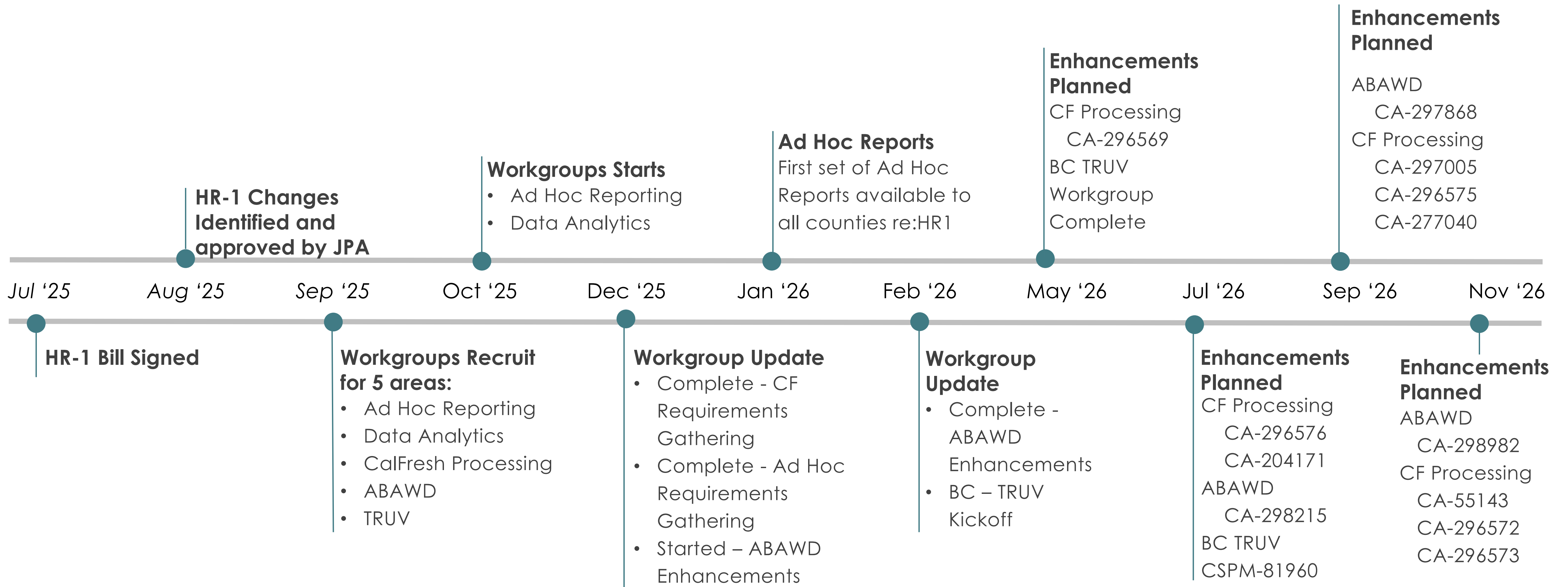
# Change Prioritization - Implementation Lifecycle

The second half of the workflow, begins once a change has been prioritized and approved. At this point, the process follows the existing Software Development Lifecycle (SDLC) used by CalSAWS.



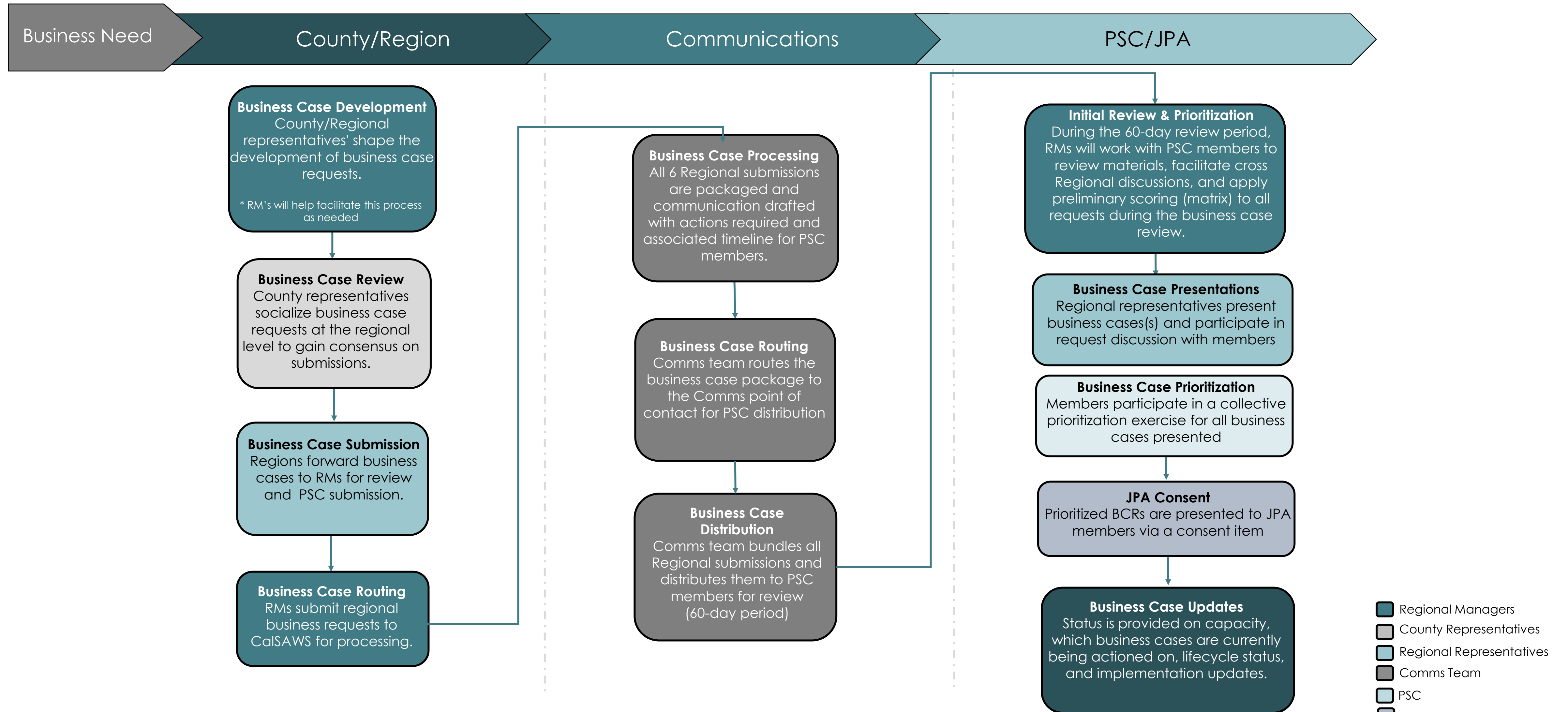
# Functionality Roadmap/Timeline

With HR-1 signed in summer 2025, CalSAWS introduced 5 workgroups to address potential enhancements to support policy changes. These Workgroups superseded the anticipated BCR process due to the identified need to identify and target SCRs to assist counties with adapting to the HR-1 changes.



# Change Prioritization Lifecycle

The process flow below demonstrates the first half of the lifecycle. It begins when a County/Region identifies a business need and follows the request through submission, review, PSC presentation and prioritization, and JPA approval.

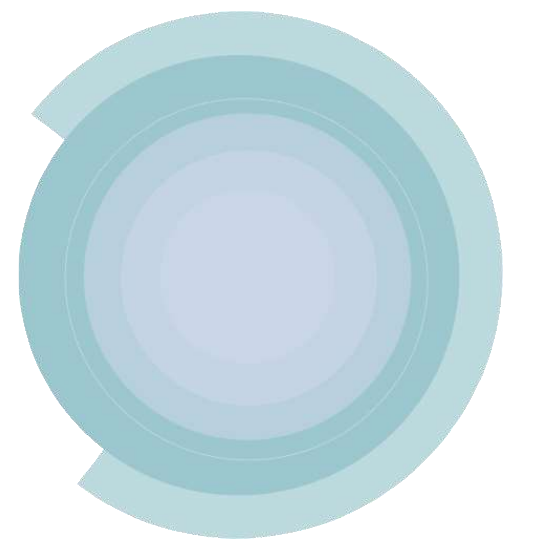


# HR-1 Workgroups Update



# CalSAWS HR1 Workgroup Updates

# CalSAWS HR1 Workgroup Updates



## CF Processing Workgroup

**CA-296569** - Nudge and Automated System Error Reviews (Phase 1)

26.05

**CA-296576** - Automate Expense Contributors

26.07

**CA-296575** - Configurable supervisor authorization enhancements by program and scenario

**CA-297005** - Automated System Error Reviews (Phase 2)

26.09

**CA-296572** - Automatic prompts during interviews to support information capture, clarification, verification, and journal documentation

**CA-296573** - Targeted nudges and navigation improvements to help workers verify and confirm information accuracy

26.11

## ABAWD Enhancements Workgroup

**CA-298215** - Add a EDBC validation to confirm the child is in the home for the parent to be determined eligible for this exemption

**CA-297868** - Multiple enhancements, including:

- Clearer identification of exemptions for specific populations (e.g., migrant/seasonal farmworkers)
- Improved capture of educational hours for ABAWD work requirements

**CA-298982** - Multiple enhancements, including:

- Increased transparency into system vs. worker applied exemptions
- Streamlined generation of key forms (CF 887 and CF 888) directly from relevant system pages

# HR1 MC Work Requirements Community Engagement and 6-month Redetermination Work Group

 **Objective:** Design CalSAWS system enhancements related to the Medi-Cal HR 1 Work Requirements and Community Engagement and 6-month redeterminations policy changes for the MAGI New Adult Group.

**Representation:** 16 counties; 6 regions; DHCS, CWDA, CalHEERS and CalSAWS leadership

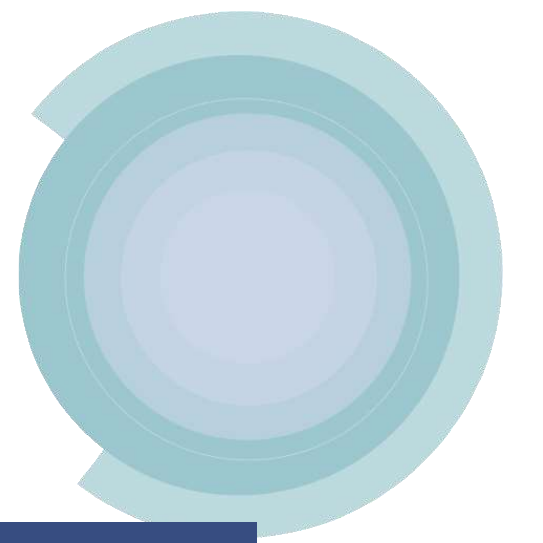


- Fresno
- Kings
- Lake
- Los Angeles
- Mendocino
- Monterey
- Orange
- Placer
- Riverside
- Sacramento
- San Luis Obispo
- San Mateo
- Santa Clara
- Shasta
- Ventura
- Yolo



**Timeline:** January 6, 2026 to September 2026

# MC Work and Community Engagement Exemptions



## Data Collection

- ✓ Pregnant or post-partum
- ✓ FFY under age 26
- ✓ In jail or prison
- ✓ Meeting CF or TANF work requirements
- ✓ American Indians or Alaska Natives (AI/AIN)
- ✓ Disabled veteran
- ✓ Entitled to Medicare Parts A & B
- ✓ Parents, guardians, or caretaker relative of a dependent child age 13 and younger
- ✓ Parent, guardian, caretaker relative, or family caregiver of a disabled individual

## Medical and Hardship

- ✓ Participating in drug/alcohol treatment program
- ✓ Medically frail or otherwise has special medical needs
- ✓ Short-term hardship

## County-wide

- ✓ Living in a county with high unemployment rate
- ✓ Living in a county impacted by a federally declared emergency or disaster

**CalHEERS Determines If An Exemption Is Met**

# MC HR 1 and VLP Risks

## Project Watch Items

### Risk 326

- CalSAWS 26.09 design completion extended due to design complexity including CalHEERS interface with no impact to scheduled test completion and final Qualified Non-Citizen (QNC) NOAs

### Risk 333

- CalSAWS and CalHEERS design in progress
- No anticipated 26.09 policy clarifications, designs, test scenarios, and schedule impact

### Risk 326

Lack of timely policy guidance may impact Medi-Cal HR1 delivery schedule

**Risk:** If policy guidance, project planning and delivery timelines are not met, then the CalSAWS and BenefitsCal system delivery may be delayed.

**Mitigation Approach:** Mitigation steps defined for planning and each SDLC Phase.

### Risk 333

Inclusion of CMS Verify Lawful Presence (VLP) service update in 26.09 may impact ability to implement Medi-Cal eligibility system changes

**Risk:** If new VLP version with QNC changes requires additional system updates, then the existing 26.09 policy clarifications, designs, test scenarios, and schedule may be impacted.

**Mitigation Approach:** Mitigation steps defined for planning and each SDLC Phase.



# 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 received
- Prioritized bundled enhancement requirements sent to CalSAWS for Committee share out. Feedback due by 4/23.
- **Completed**

## 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 sent to CalSAWS for Committee share out. Feedback due 4/21.
- **Completed**

## TRUV Workgroup- phase 1

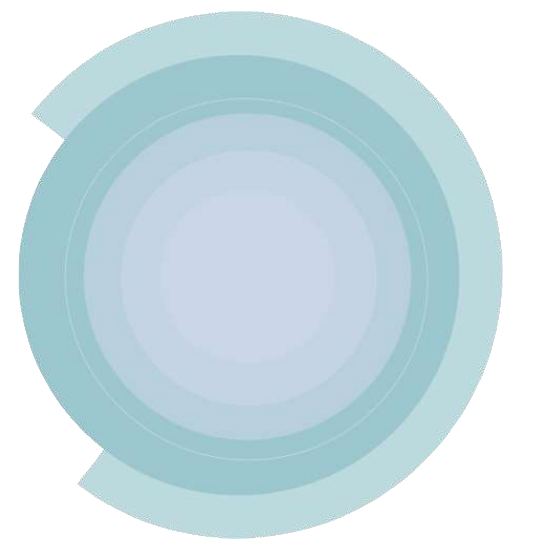
- Milestone 2 session completed (2/26/26)
- 21 enhancement requirements to be incorporated in the designs working with Truv
- Design presented as part of Milestone 3 at the April UCD session
- Designs in partnership with CalSAWS and Committee for end-to-end (customer-to-worker) experience
- **Completed**

## Medi-Cal Workgroup

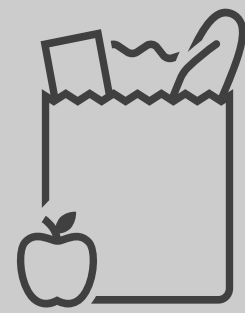
- Milestone 3 session completed (4/2/26)
- 30 bundled requirements being finalized for sharing with participants
- Advocate priority rankings due 4/22.
- Prioritized bundled enhancement requirements sent to CalSAWS Medi-Cal Committee first week of May.

# BenefitsCal HR 1 Priorities

## CalFresh and Medi-Cal Changes



### CalFresh



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

### Medi-Cal



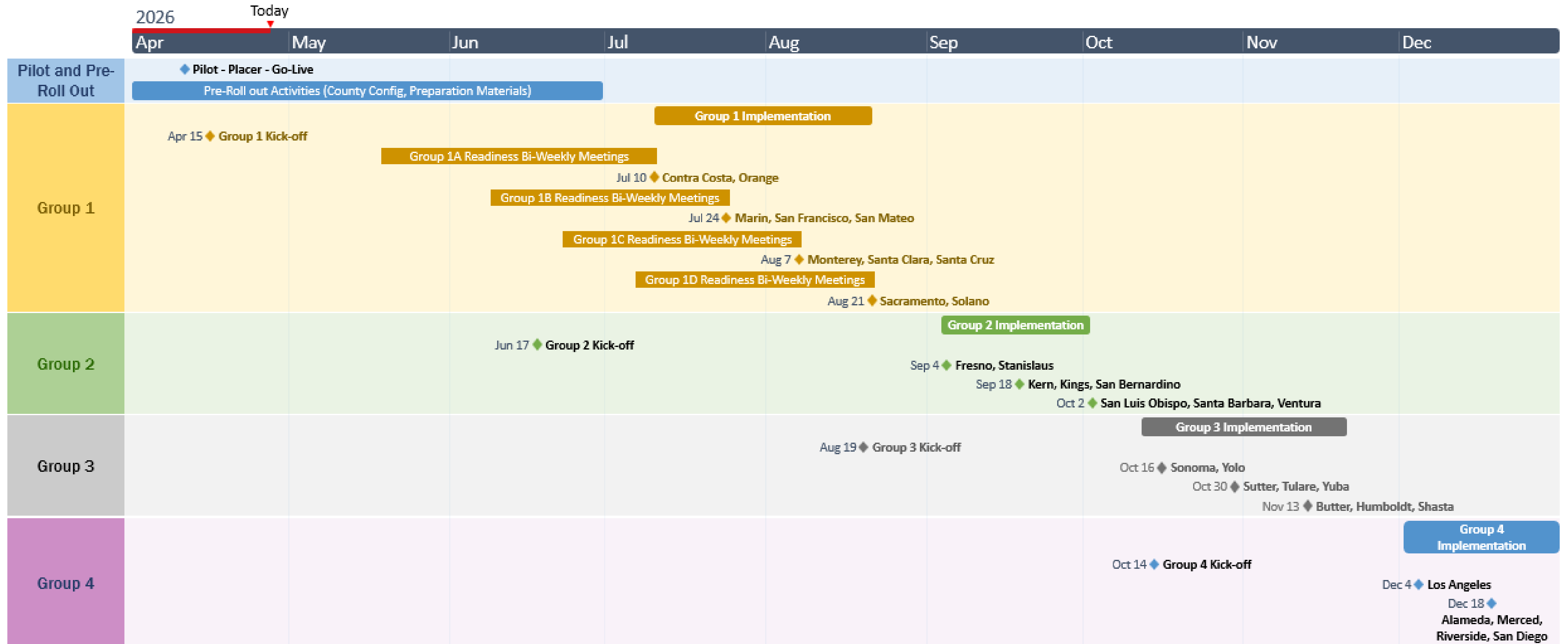
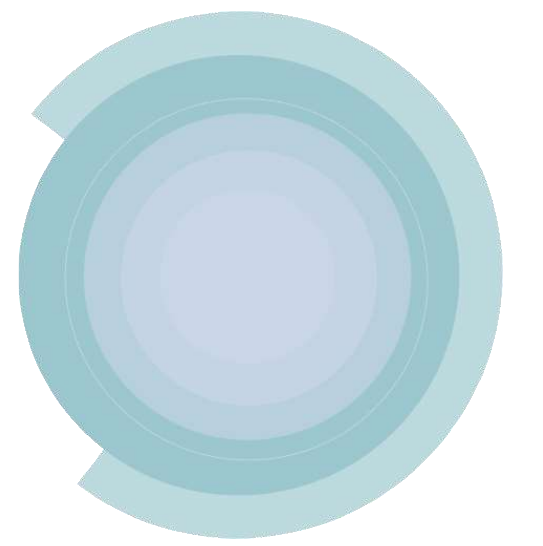
- CSPM-80312: Asset Reinstatement - Non-MAGI (25.12.21) **Released**
- CSPM-80930: Retroactive Medi-Cal Update (26.06)
- CSPM-80928: Work Requirements - MAGI (26.09)
- CSPM-80929: Semi-Annual Redeterminations – MAGI (26.09)
- CSPM-81631: Cost-Sharing for Adults (2027)

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

# Call Summarization Update

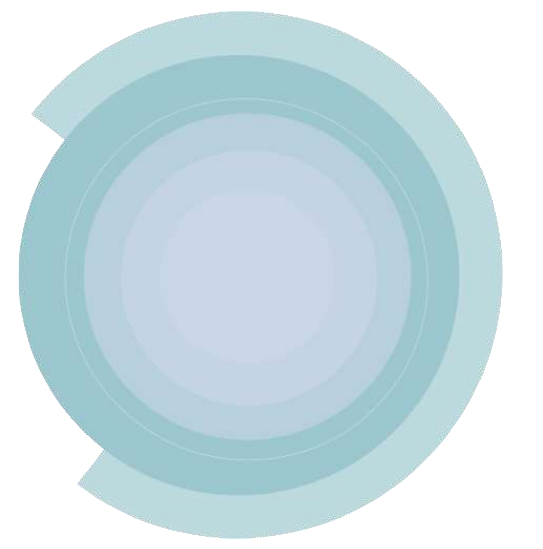
# Call Summarization Timeline

## Solution Path



# Pre-Implementation

## Pilot Preparation and Pilot

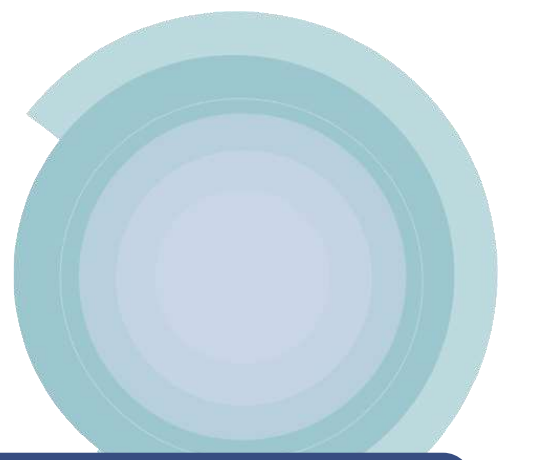


Release	Target Timeframe	Activities and Dependencies	Status
Technical Solution Review	September – October 2025	<ul style="list-style-type: none"> <li>Review existing configuration and architecture</li> </ul>	Complete
AWS Coordination and Solution Testing	November 2025 – March 2026	<ul style="list-style-type: none"> <li>Collaborate with AWS to verify solution</li> <li>Complete solution integration</li> <li>Complete solution testing</li> </ul>	Complete
Pilot	January – May 2026	<ul style="list-style-type: none"> <li>County Readiness</li> <li>Product Support during Pilot</li> </ul>	In Progress
Rollout	Jun 2026*	<ul style="list-style-type: none"> <li>Begin Ongoing Product Support</li> </ul>	In progress <ul style="list-style-type: none"> <li>Group 1 Kickoff Meeting Complete</li> </ul>

\* Requires successful conclusion of the pilot to go live

# Pilot

Results from April 10th through April 24th



## Key Performance Metrics

**Since Launch**  
4/10/26 Forward

**2,858**

Summaries Generated Since Launch

**5**

Avg Generation Time (Seconds)

**100%**

% Generated within 60 seconds

## Percentage Time Reduction

**3.16%**

Reduction in ACW

**1.43%**

Reduction in AHT

## Percentage of Content Unedited

**82.85%**

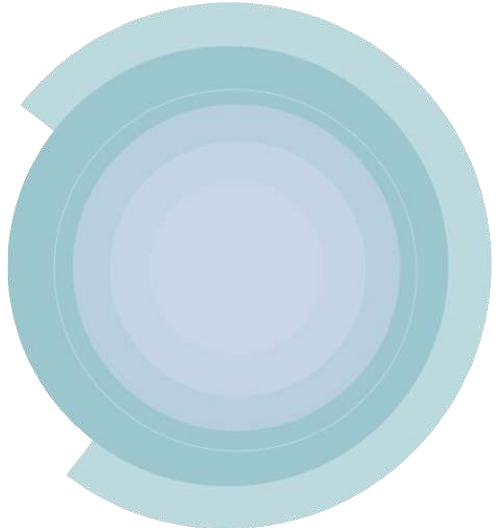
Call Summary Content Unedited

## Observations/Notes

- After Call Work (ACW) and Average Handle Time (AHT) are expected to have good amount movement over the next few weeks until we have a larger sample size that represents all agents, and variety of call topics/types.

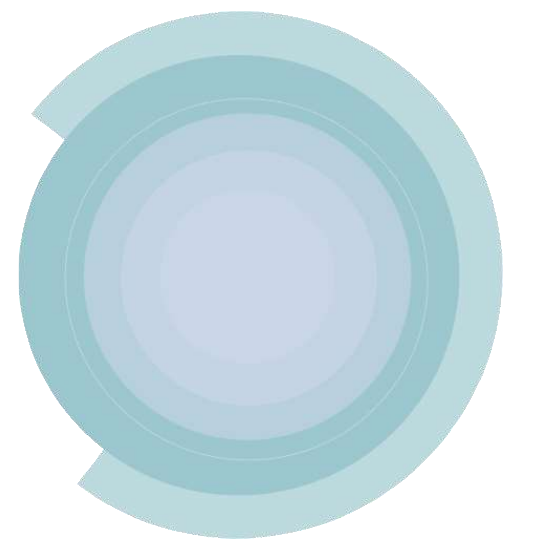
# Implementation Approach

## Pre-Roll-out Activities



# 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
  - ❖ Schedule based on a geographical approach when possible

# Call Summarization

## Project Watch Items

### Change Management and Non-Technical

- **County Readiness**

- See activities for pre-work in the “County Readiness Activities” area of this slide

- **Material/Session Verification**

- Review of materials (training, readiness, etc.) and sessions post pilot and following waves for improvement as needed

### Technical

- **Successful Pilot Completion**

- Functionality as expected (Based on errors identified and/or significant editing by a large number of agents)

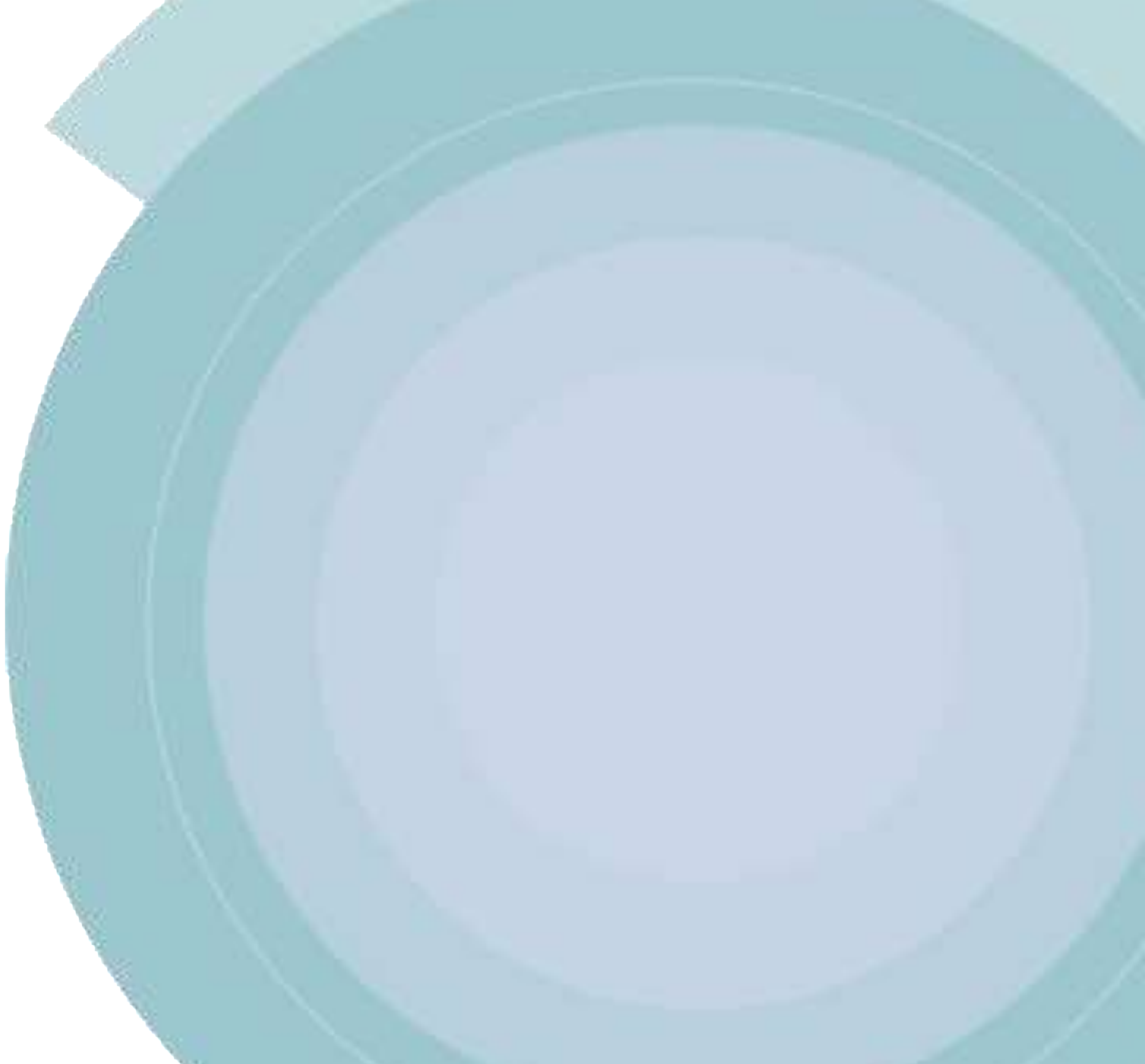
- **Performance**

- Summaries are generated in the expected time

### County Readiness Activities

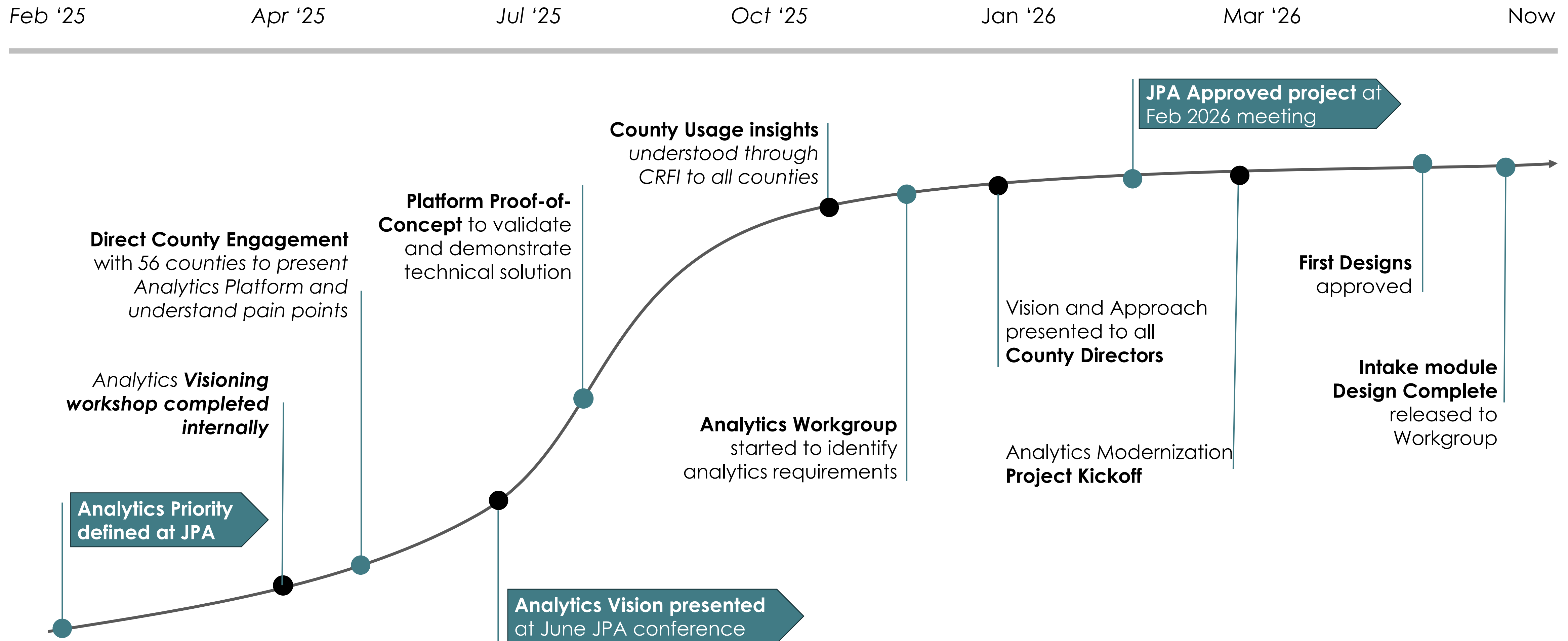
1. Determine if your County has an applicable AI policy and, if so, what information is needed to verify acceptability
2. Consider union related activities, if applicable, and what information is needed to support these communications
3. Consider your testing strategy including roles (agents, supervisors, bilingual, etc.)
4. Begin determining your training and communication plan using the following available materials:
  - Design document
  - Training materials
  - Frequently asked questions
  - Demo videos
  - Readiness checklist

# Data & Analytics Update

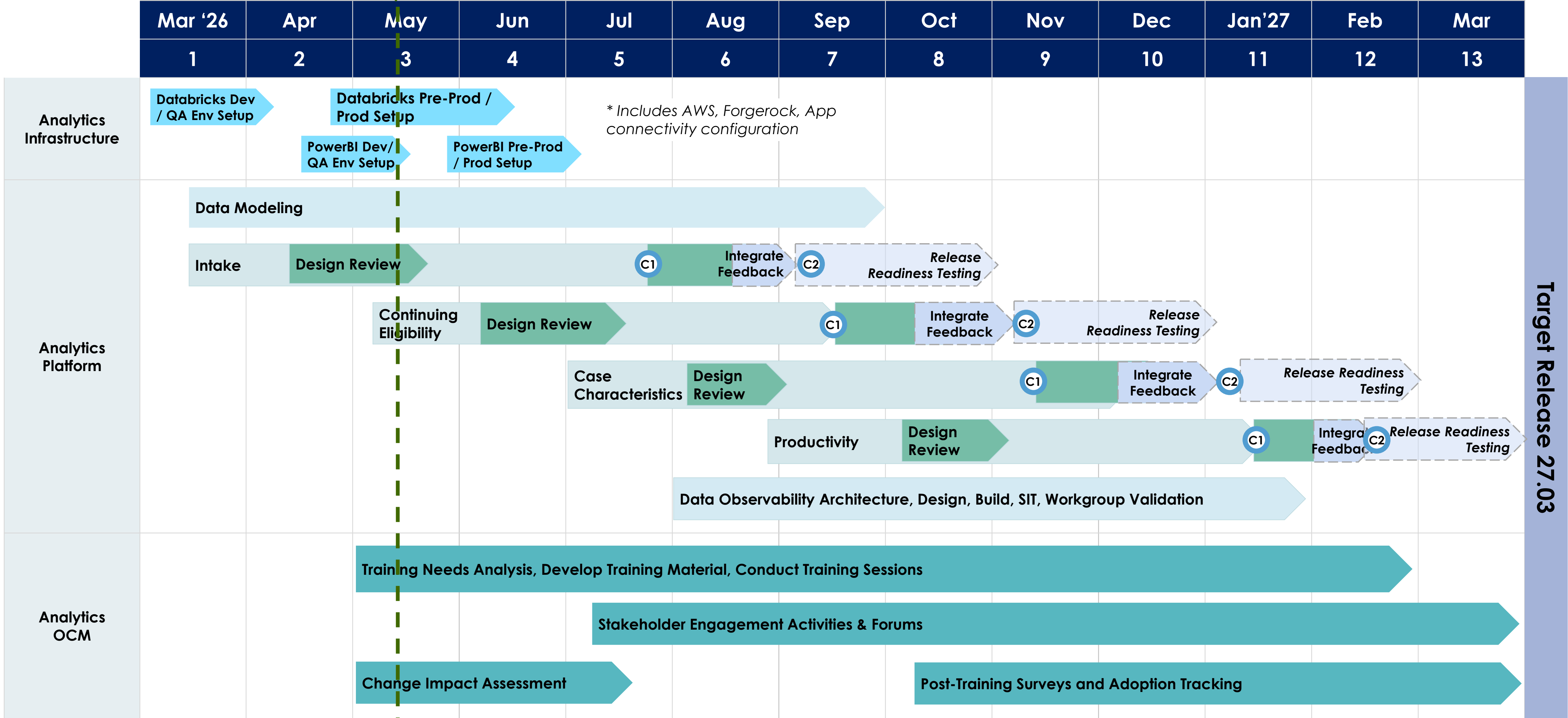


# Laying the Groundwork for the Analytics Platform

Several **targeted actions 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



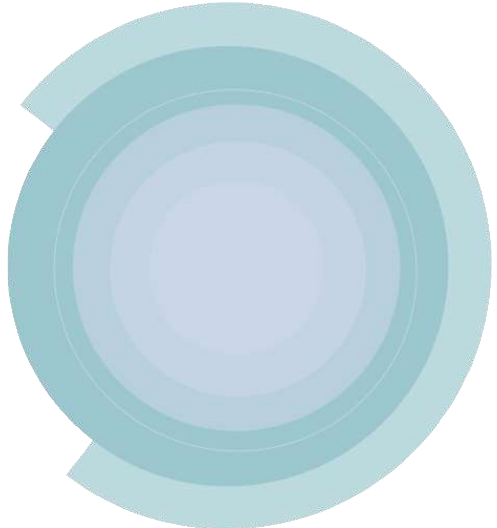
# Phase 1 Execution Timeline



Target Release 27.03

# Analytics Workgroup Representation

Diverse Personas represented across regions



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

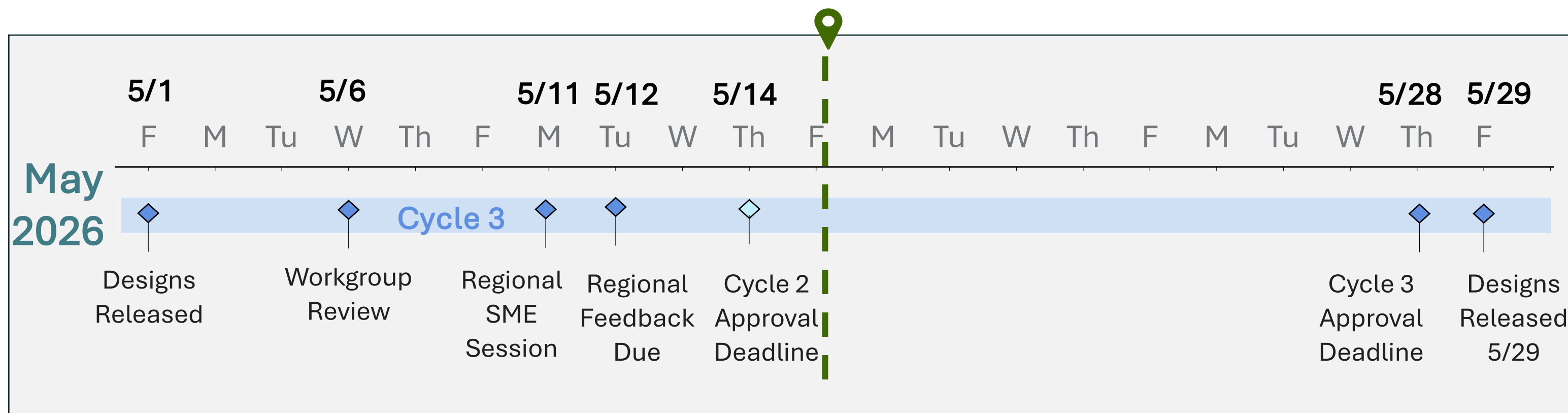
*\*Note: CDSS and DHCS are part of Analytics workgroup and will participate in the design sessions*

# Analytics Workgroup Design Review

## Project Watch Items

### Project Review Cycle Cadence — May 2026

- New Analytics designs reviewed and approved through the Data Analytics Workgroup
- Each cycle includes a Regional SME Feedback session for report SMEs not in the workgroup
- 10 business days per cycle to review and approve report designs (~20 reports / dashboard pages per cycle)
- Six review cycles planned across April–June 2026; participants' weekly time commitment ~5–8 hours



### Risk 332

Limited County Review Capacity May Impact Analytics Modernization Delivery Schedule

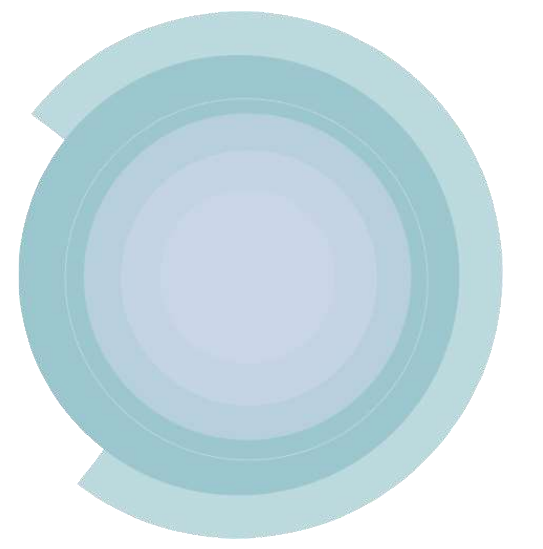
#### Risk:

If this review capacity is not maintained due to limited availability or delayed feedback cycles, then development and release timelines may be impacted.

#### Mitigation Actions:

1. Group reports into logical review batches.
2. Perform detailed internal reviews with the Policy & Design, Data Integration, and QA teams.
3. Establish a structured review cadence.
4. Schedule review sessions in advance.
5. Provide clear review timelines and expectations to county workgroup participants.
6. Escalate delays early through governance channels if review cycles fall behind schedule.

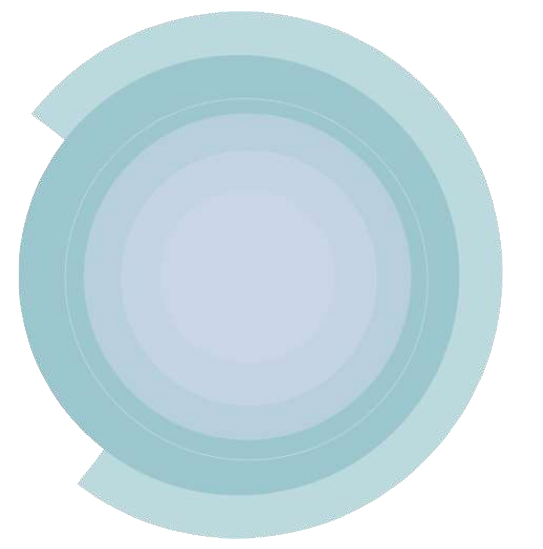
# Intake Subject Area – Sprint Status



Design work on the **Intake module design** is already **100% complete**, with six dashboards advanced in rapid succession, full approval expected by end of the May :

	Dashboards	Design Review Status
<b>Sprint 1</b>	1. Pending Applications	<ul style="list-style-type: none"><li>• Design Approved by All Regions</li></ul>
<b>Sprint 2</b>	1. Application Processing Statistics 2. ICT	<ul style="list-style-type: none"><li>• Designs Reviewed by Workgroup</li><li>• SME Feedback Received</li><li>• Feedback incorporation in-progress</li></ul>
<b>Sprint 3</b>	1. Application Characteristics 2. E-Tools Intake 3. CWS Intake	<ul style="list-style-type: none"><li>• Designs delivered to Analytics Workgroup</li><li>• Initial Workgroup review complete</li><li>• SME Review Sessions complete</li></ul>

# Analytics Action Items Updates



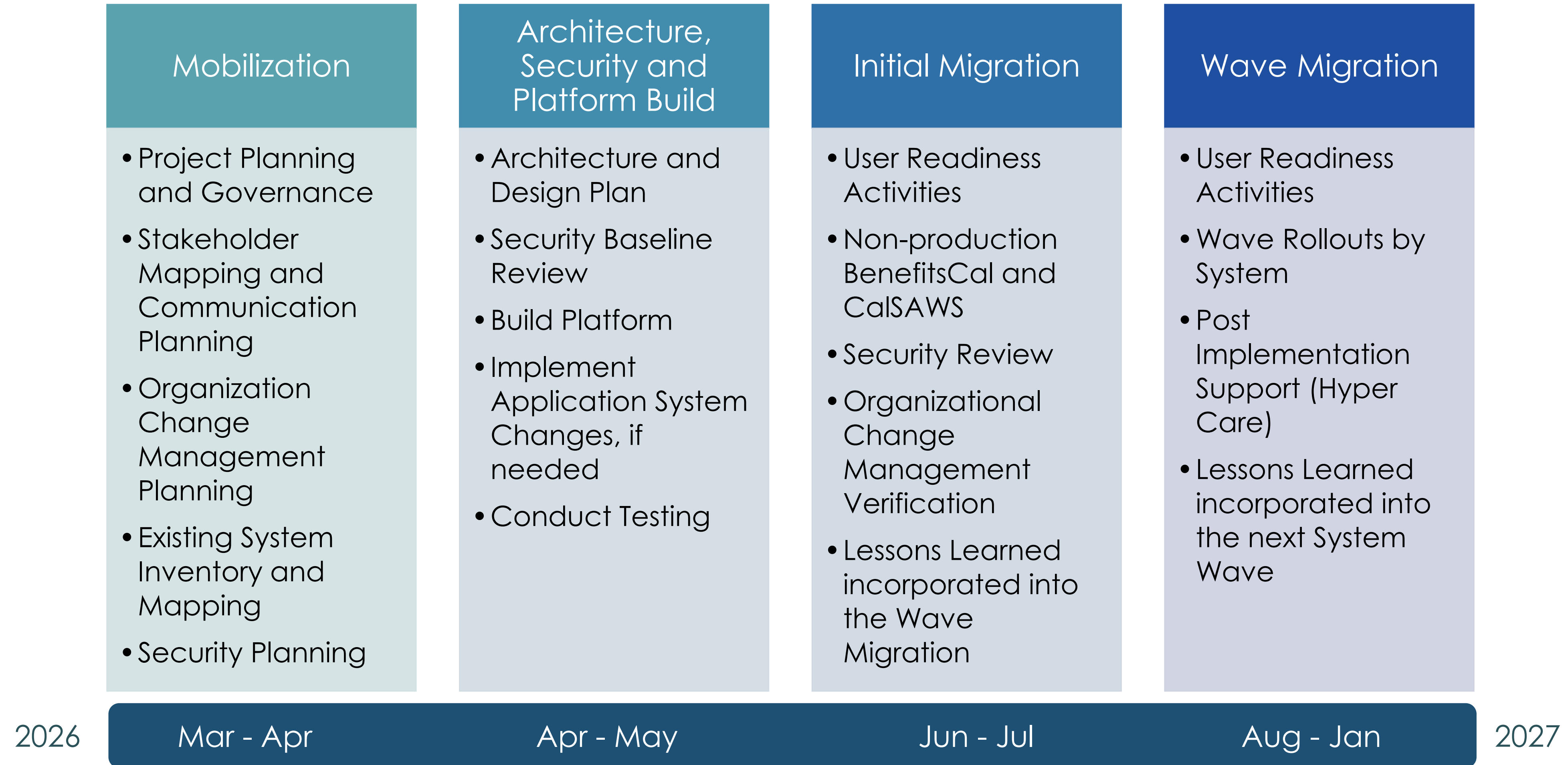
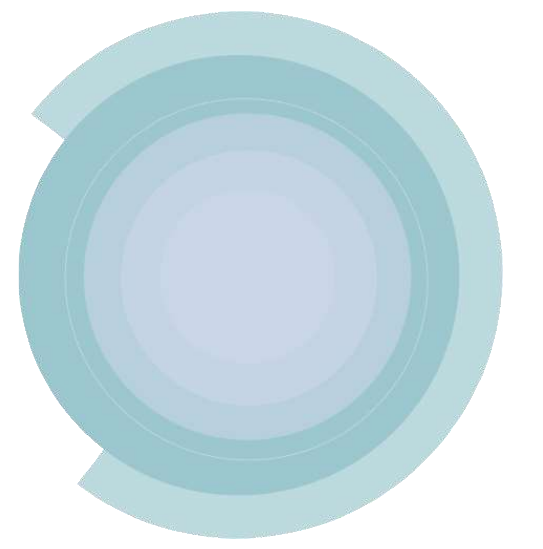
Below is a list of the action items we had from the last JPA meeting (for Analytics) and its current status:

	Ask from JPA	Update
1.	Allow more time for fiscal review within the Analytics Phase I Timeline.	Addressed, Added Fiscal SMEs for the review of Intake and other dashboard designs. Communication was sent last week and SMEs added.
2.	Email the Board the names and roles of the Analytics Workgroup Members, especially the “Executive” level members.	Addressed as the “Executive Sponsor – PSC Member Napa County” had been onboarded.
3.	Highlight within Phase 1 Analytics Timeline where opportunities for visual representation of the work can/will be presented.	Addressed on the Phase 1 Execution timeline. Preview is targeted for end of July
4.	Provide estimate of when actual reports are expected for Phase 1.	County preview is targeted for end of July
5	Plan analytics demonstration sessions for directors and look into partnering with CWDA.	Engagement with CWDA will be included as a part of the creation of the OCM plan that is in progress

# Identity Access Management (IAM) Update

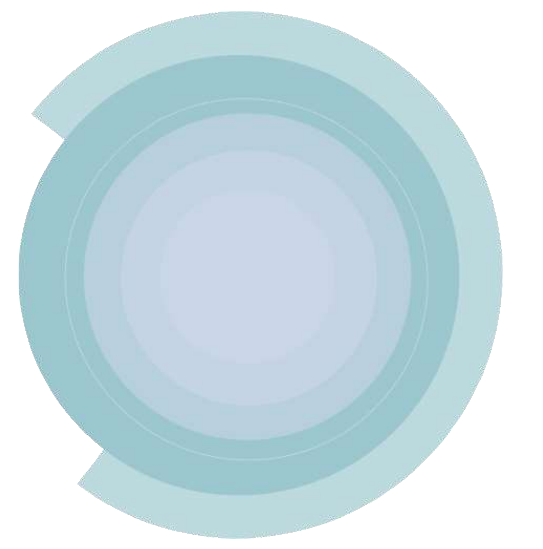
# IAM Replacement

## Timeline



# IAM Replacement

## Draft Migration Waves



### Initial Migration (Wave 0)

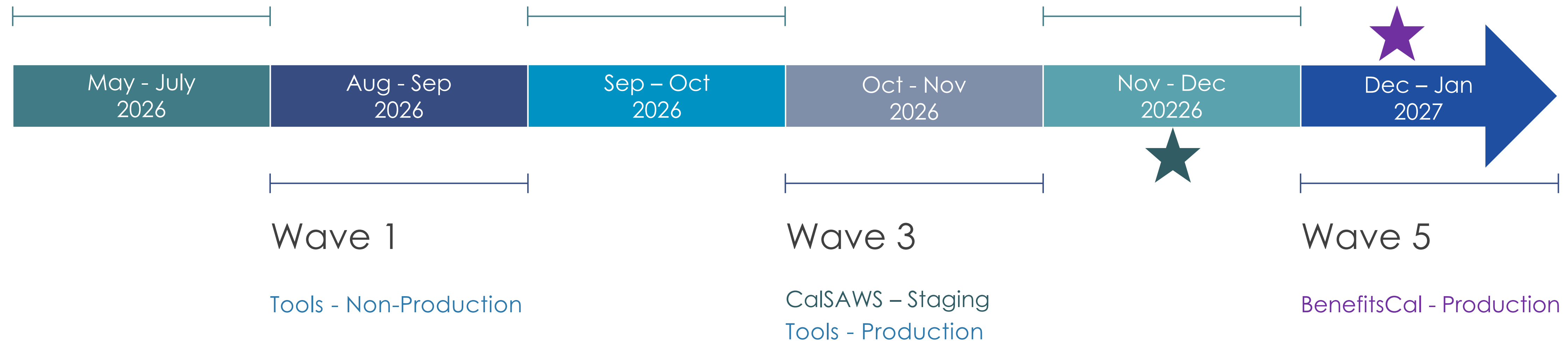
CalSAWS – Development  
and Assembly Test  
BenefitsCal - Development

### Wave 2

CalSAWS – Staging  
BenefitsCal - Staging

### Wave 4

CalSAWS – Production

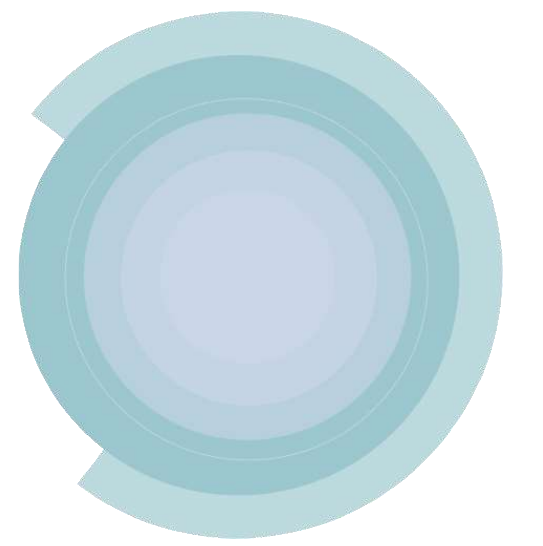


Tools includes Jira, LMS, ServiceNow

# Overview of Oracle Infrastructure Update

# Oracle Databases@AWS

What Is It and Why Change?

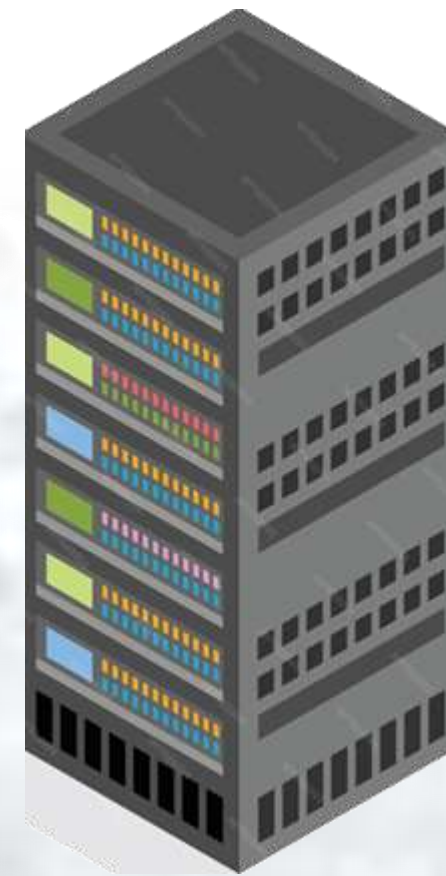


**REPLACE**



Oracle Databases deployed on AWS EC2 Servers

AWS



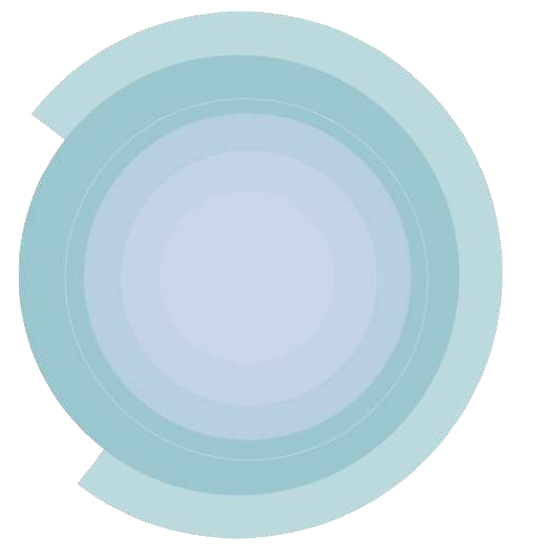
Oracle Databases deployed on Oracle Exadata Servers at AWS

## 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



## Planning

Conduct procurement and planning activities



Jun-Nov  
2025

Dec-Jun  
2026



## Non-Production Environment Readiness

Prepare for and deploy non-production environments



Jul-Aug  
2026

## Go Live

Implement with August release and provide hyper care



Jul-Aug  
2026

Aug-Sep  
2026



Oct-Nov  
2026

## Environment Standup

Standup servers, configure test environment connectivity and conduct testing



## Production Readiness

Prepare for Production deployment and conduct disaster recovery testing



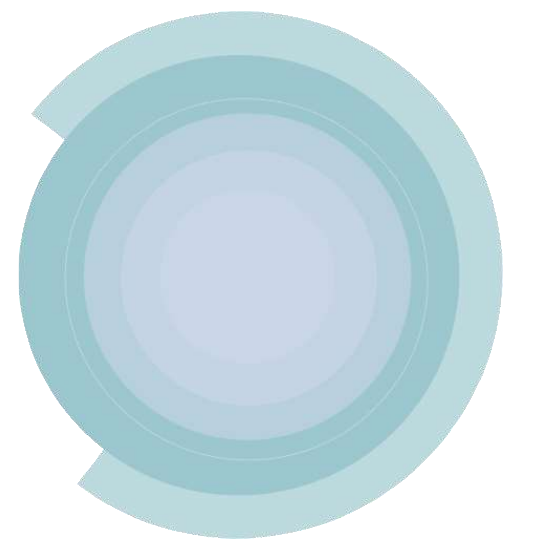
## Decommission

Decommission retired database servers



# Oracle Databases@AWS

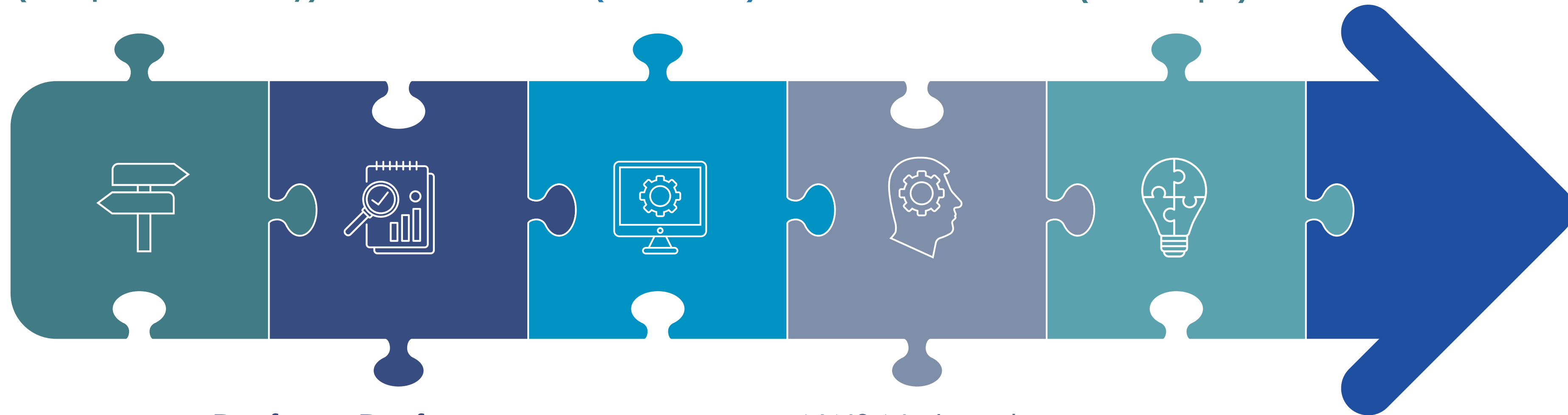
## Performance and Functional Testing Rounds



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

## Project Watch Items

### Change Management and Non-Technical

- **Awareness of the Upcoming Change**
  - No user changes expected
  - Communication at JPA/PSC and Regional meetings
- **Environment Constraints**
  - CalHEERS and HR1 releases
  - Coordinating with M&E and reviewing environment schedules

### Technical

- **Encryption Key Availability**
  - Oracle KMS Cross region support not available until May/June 2026
  - Escalated to Oracle management on meeting the delivery date
- **Performance and Connectivity**
  - Conducting functional, performance, endurance and operational testing
  - Performing configuration comparisons and connectivity testing

### Risk 336

Move of Database Servers to Oracle Databases@AWS May Result in User Impact

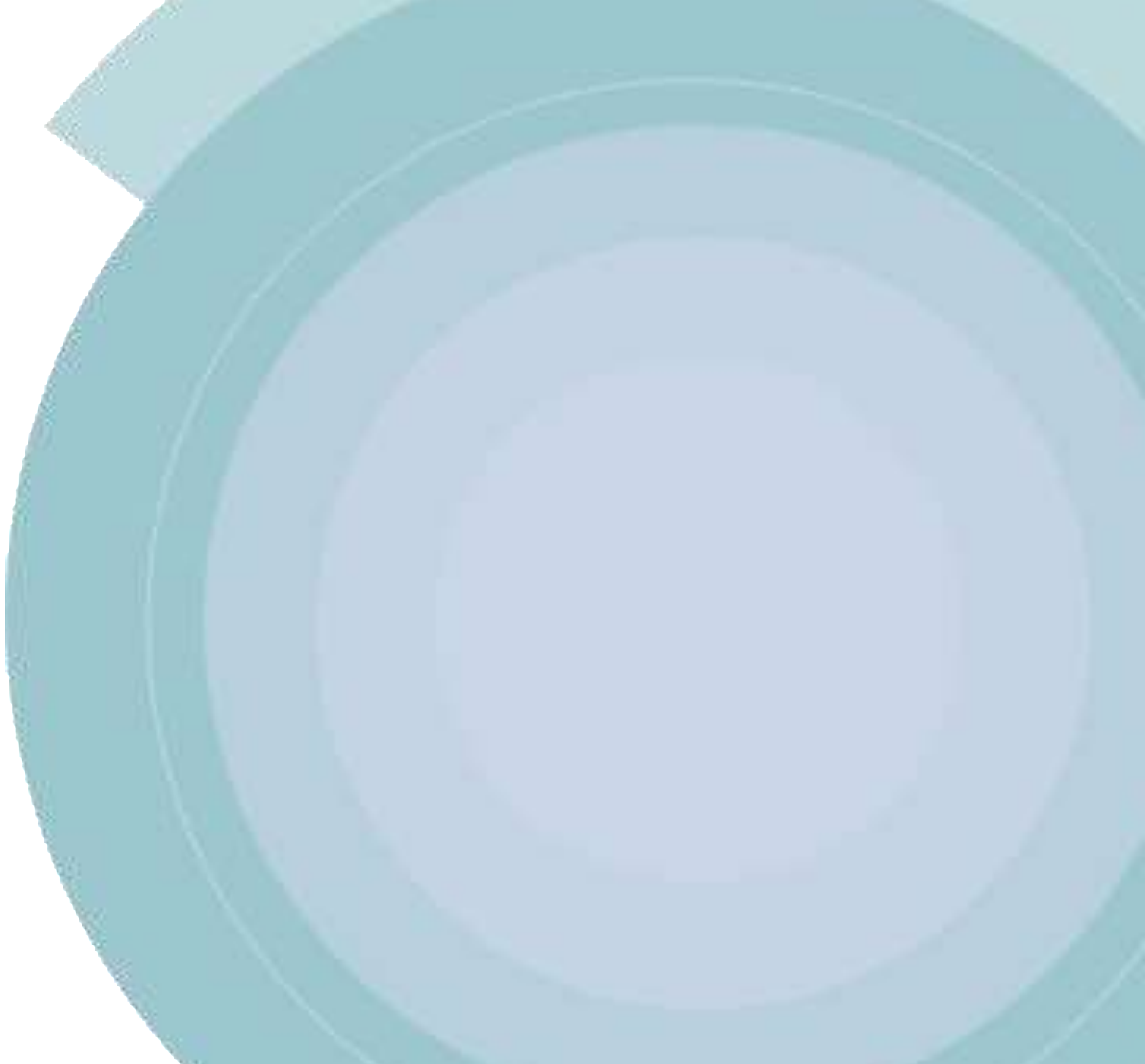
#### Risk:

If database server configurations are not effectively identified, implemented and tested, and the mitigation plan is not effective, users could experience CalSAWS system outages or poor system performance.

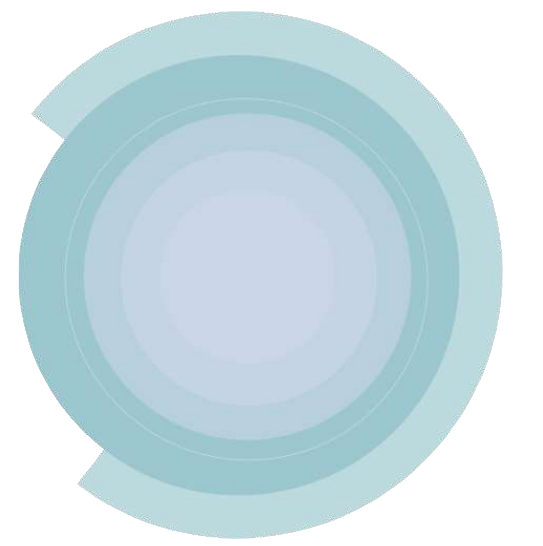
#### Mitigation Actions:

1. Constructing a detailed project plan to include testing for functionality, performance, batch and connectivity
2. Engaging in multiple testing runs in partnership with the M&E vendor
3. Incorporating the new database server into the release such that development and release testing cycles make use of the new technology
4. Determining the rollback plan in the case of unexpected significant problems

# Workload Management Overview



# Workload Management Redesign

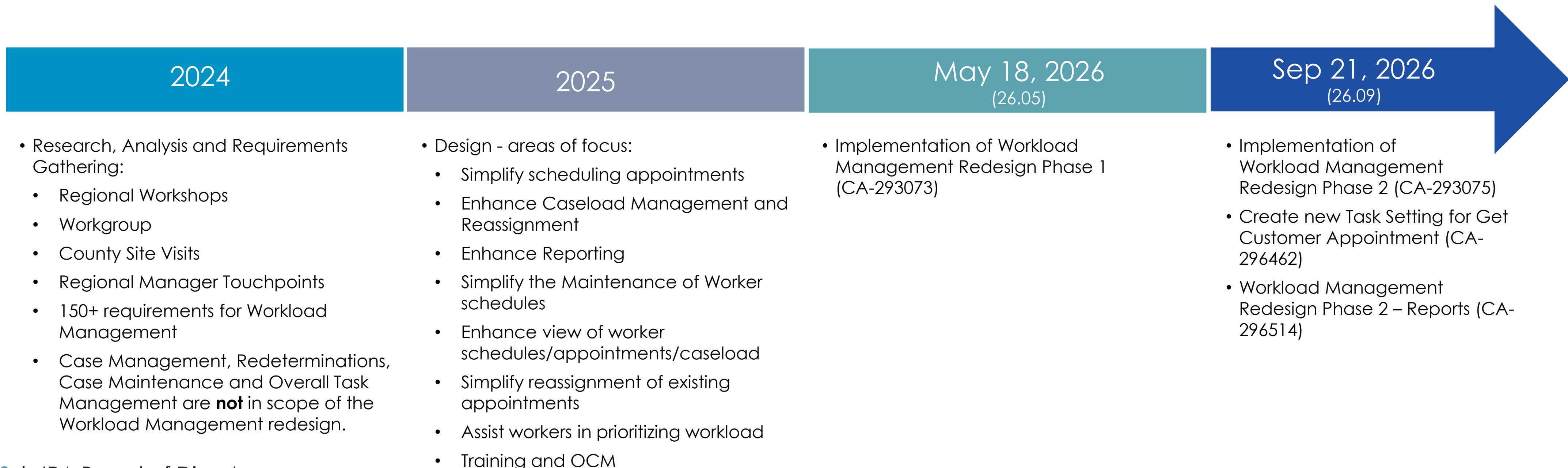


**Objective:** Enhance CalSAWS to assist staff in assigning appointments to workers, scheduling and rescheduling appointments, establishing worker availability, and tracking appointments.

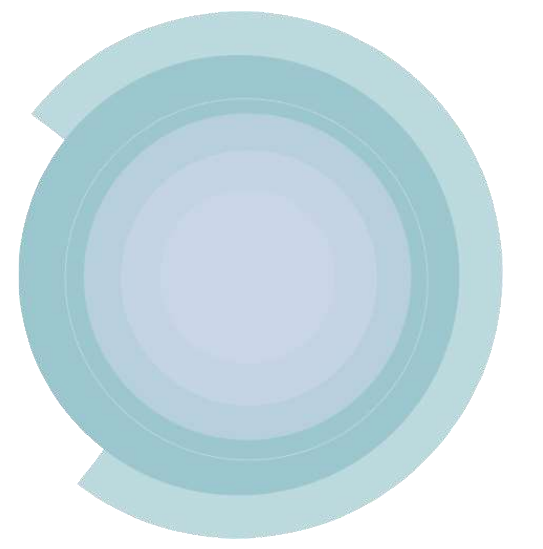
**Representation:** 44 counties; 6 regions; and CalSAWS leadership

- **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 & what is coming up next to prepare counties for changes to the Workload Management system

## DESIGN & PLAN

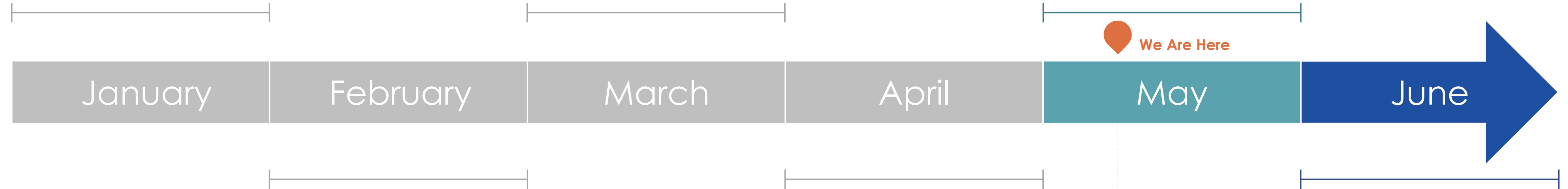
- Design Approved
- OCM Plan Developed

## 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 (County Facing)
- Communicate Changes
- April Bulletin
- Conclude Regional Meetings
- County Validation Begins

## POST GO-LIVE

- Post-Implementation Office Hours
- Phase 2 Continue

**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: System Demonstrations

## OUTCOMES

- The demonstrations presented Counties a clear summary of what to expect at go-live.
- Staff received walkthroughs of upcoming workflows, screens, and features.
- Workload Management SMEs provided insight on what is changing and enhancements available to opt in to.
- Attendees were given an opportunity for two-way engagement for questions to strengthen understanding .

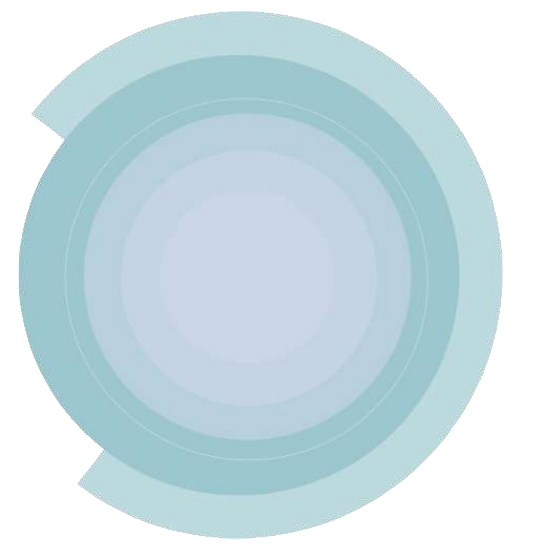
## SESSIONS & AUDIENCE

- **April 15 & 21 | Operations Staff**
- **April 15 & 21 | Supervisor/Management**
- **April 16 & 28 | County Administration**

## TOPICS COVERED

- **Appointment Management**
  - Streamlined scheduling, improved history tracking, and broader reassignment support.
- **Workload Management**
  - Adds capacity-based case assignment/reassignment, automated recurrence, and better visibility.
- **Schedule Management**
  - Improves schedule views/filters, adds availability-based controls, and updates access rights.
- **Overall Management**
  - Adds a new My Work page for schedules, appointments, assignments, tasks, and (optional) e-messages.
- **Staff Administration**
  - Adds new/updated configuration pages (capacity, appointment durations, schedule categories).

# ROI Status Update

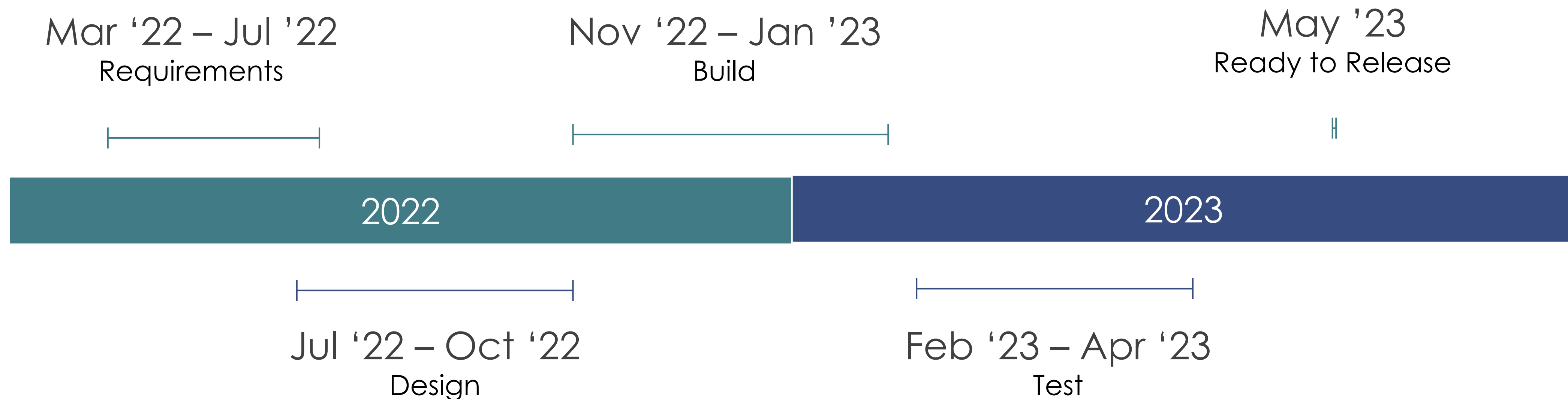


# Release of Information - Prior Implementation and Timeline – ACL 23-37

## Summary of Prior Implementation (Disabled in Production):

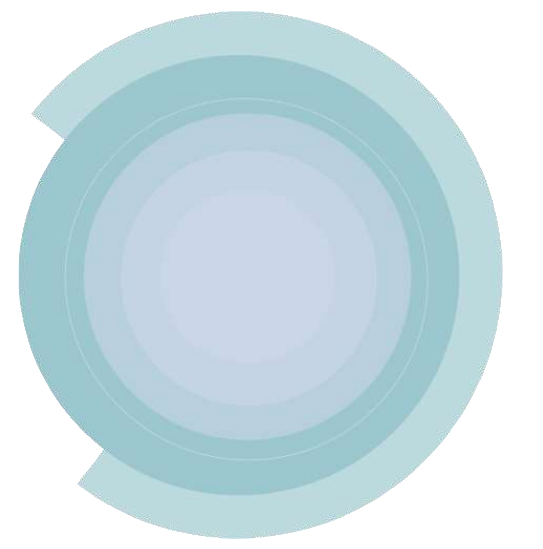
- Ability for Customers and CBOs to submit ABCDM 229s through BenefitsCal.
- Ability for Customers to view ROI details and CBOs to view customer case details released.
- Ability for Customers to revoke and manage ROIs.
- Ability for Counties to manage ROIs in CalSAWS.
- APIs to support data transfer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

## Implementation Timeline:



# Key Events

## History of Release of Information Functionality



**May 12**

At JPA, Counties request pause on ROI rollout (security & operational concerns)

**Jan - Feb**

Consortium, QA and vendors review and submit feedback

**Mar 26**

Estimates Delivered

**Jun 27**

Revised SCERFRA for phased approach Received

**Oct - Jan**

Added ROI as a doc type for CBOs and Customers

**Mar - Apr**

Conduct planning and pre-work for implementation



2023

2024

2025

2026

**Aug 14**

ROI Workgroup Established and Kicked-Off

**Dec 24**

Draft ACL Released by CDSS and DHCS

**Mar 12**

State requests estimates through the SCERFRA process

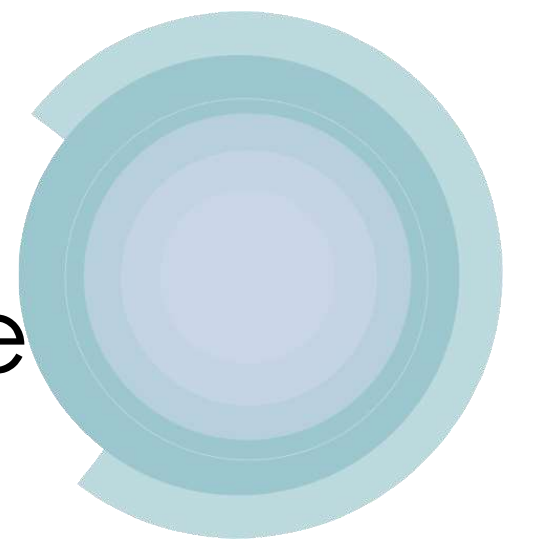
**Jul 14**

CalSAWS submits SCERFRA response

**Feb 26**

Updated tracking for CBO Referrals

# ROI Phased Implementation Plan – ACL 24-91



The phased approach for ROI implementation previously communicated will be updated into a delivery schedule and communicated in the next JPA meeting.

Phase 1A	Phase 1B	Phase 2	Phase 3
<ol style="list-style-type: none"><li>1. Refine Requirements.</li><li>2. Clean Up Existing CBOs.</li><li>3. Confirm CBO Identifiers and Structure.</li><li>4. Draft Terms &amp; Conditions, Rights &amp; Responsibilities.</li><li>5. Identify Communication and Training needs</li></ol>	<ol style="list-style-type: none"><li>1. Merge Existing Code.</li><li>2. Implement T&amp;C and R&amp;R.</li><li>3. Update ForgeRock/Ping CBO Structure.</li><li>4. Update BenefitsCal and CalSAWS with new form.</li><li>5. Update CBO Search-ability for customers and counties.</li><li>6. Training Materials.</li><li>7. Update CBOs ability in BenefitsCal to submit ROI forms via Doc Upload.</li><li>8. Update CalSAWS to capture telephonic sign. for ROI.</li></ol>	<ol style="list-style-type: none"><li>1. Update CalSAWS to capture ABCDM 229 for CBOs that do not have a BenefitsCal Account.</li><li>2. Update CalSAWS to nudge and search for pending ROIs at the time of renewals, re-applications and for ESAP households.</li></ol>	<ol style="list-style-type: none"><li>1. Update BenefitsCal to allow CBOs to opt in and out of ROI functionality.</li><li>2. Expand ROI to all employees of the CBO.</li><li>3. Display termination reasons on CBO and Customer dashboard</li></ol>
~4-6 Months	~ 6 Months after Phase 1A	~3 Months after Phase 1B	~4 Months after Phase 2

# Policy & Release Update

## OVERVIEW

**Issue:** Following the implementation of the PVS SCRs in release 26.03 and incident was identified impacting the April 11th batch run.

**Impact:** Across the counties, approximately 9% of PVS cases were impacted.

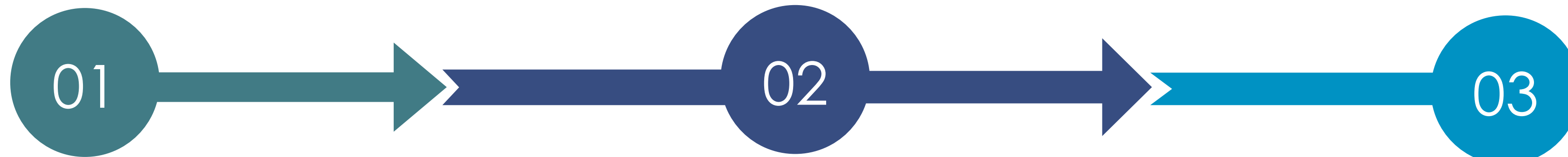
**Root Cause:** The issue was traced to duplicate abstracts in the April PVS file that were not accounted for in the PVS Automation design.

## CURRENT STATUS

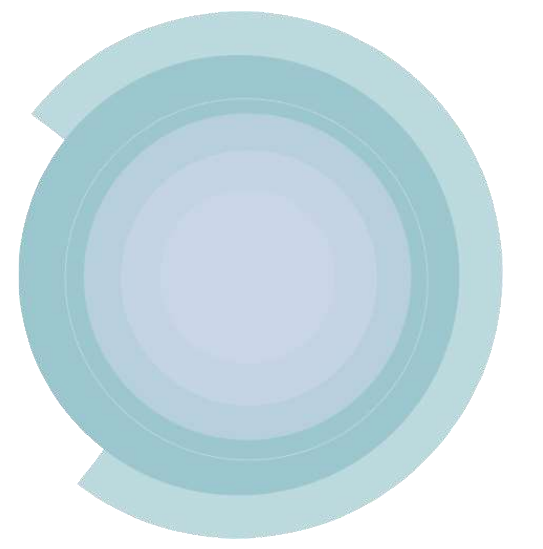
- Data cleanup – **complete**
- Automated EDBC run (cases that do not need worker action) – **complete**
- Case list published on the communication portal and CAT – **complete**
- PVS automation suspended – **complete**
- Long-term fix to handle duplicate records (the PVS automation stays suspended until then) – **in-Progress**

## LESSONS LEARNED

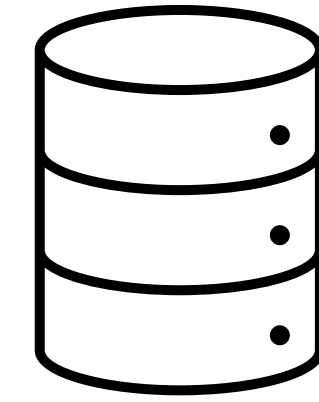
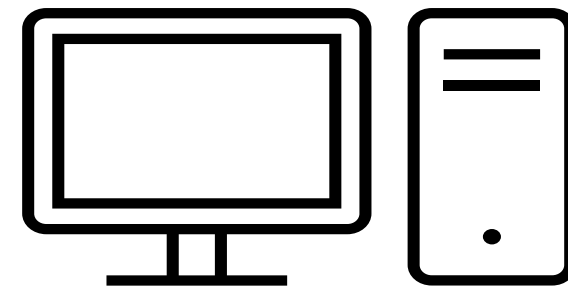
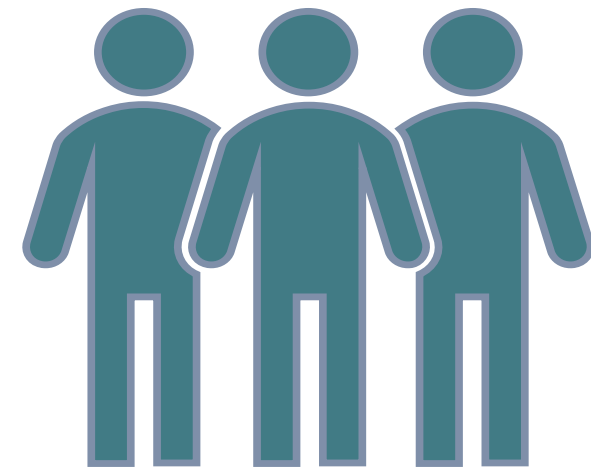
- Consider pilot approach for future automations
- While the data is from trusted source the content must be re-examined for clarity
- Better to be right than fast. Impact is large with even small bulk processing errors
- More time allocated for testing and county validation for future automations



# Production Simulation- FCED



- Gives CalSAWS users hands-on experience reviewing and processing FCED API updates
- Counties work with their CARES counterparts and work scenarios at their own pace



## Timeline

- May 18 – October 2026
- May 18 and Jun 1 onboarding users
- June 1 | CARES & CalSAWS linked data available
- County Recruitment CRFI 26-020

## County Participation

- Participating Counties: 58 - Up to 14 per county
- Onboarding in two phases - May 18 and Jun 1
- Validate business processes, experience the use of etools and edata
- Log Findings

## Environment

- Production like environment
- Security Profiles mirror CalSAWS production
- County Admins will update and maintain own county participants with FCED Security groups and set up FCED tasks
- Login process mirrors CalSAWS production

## Data

- Copy of Foster Care (FC), Kin-GAP (KG), and AAP active cases within the CalSAWS production
- Existing CalSAWS cases will be linked to the applicable CARES case
- New created data

## Support

- Kick Off; Demos;
  - May 19
  - May 28
- Scheduled Office Hours
- Findings support and disposition

# FCED Risk

## Project Watch Items

### **Risk Summary:**

Production Simulation prior to pilot go-live was paused. Production Simulation replaces process Simulation. Recently the CARES project secured a vendor to support this activity. This has impacted production simulation timeline, resources, environment availability, and data compliance .

### **Mitigation Actions:**

5/15 Finalize Production Simulation approach for CalSAWS Participants in CalSAWS

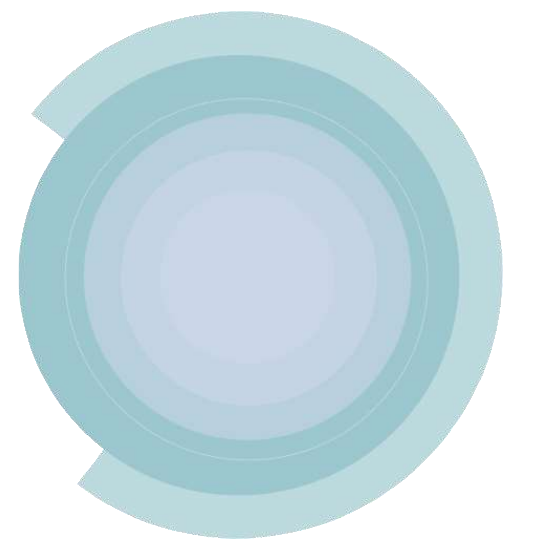
- Prod Sim Support Structure
- 5/19 and 5/28 onboard CalSAWS participants and share OCM Resources and training materials
- Support Office Hours
- Findings reporting process- leveraging EUST 3 approach

Continue to collaborate with CARES to develop shared timelines and milestones for coordinated county communications

**Risk 324 CARES – Delay in communication may impact CalSAWS participation in the Production Simulation activity prior to go-live**

# Release and Policy Update

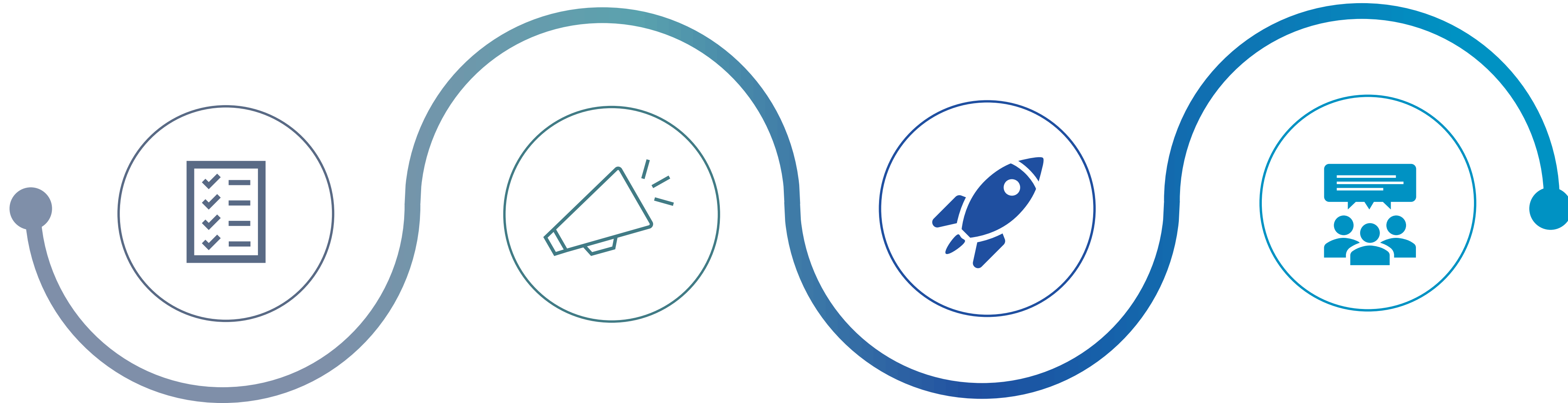
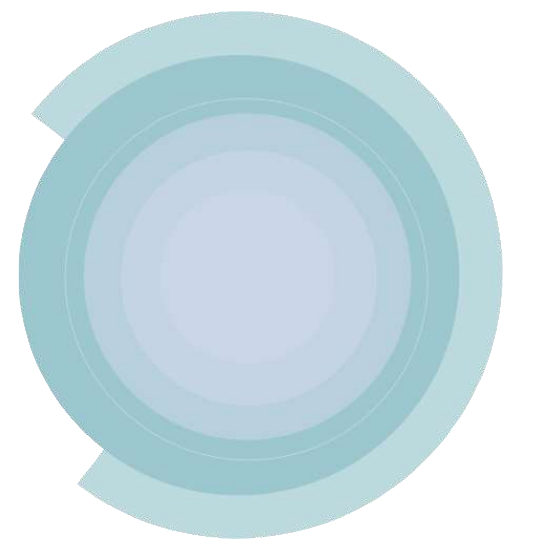
## Upcoming Releases



<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	<b>August</b> Priority Releases
<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><li>• <b>CalHEERS eHIT SCRs:</b><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></li></ul> <p><b>6/XX/2026:</b></p> <ul style="list-style-type: none"><li>• Back to School Clothing Allowance (CA-216953)</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>	<p><b>8/XX/2026:</b></p> <ul style="list-style-type: none"><li>• CDSS CalFresh ABAWD Auto Exemption - August 2026 Effort (CA-300398)</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

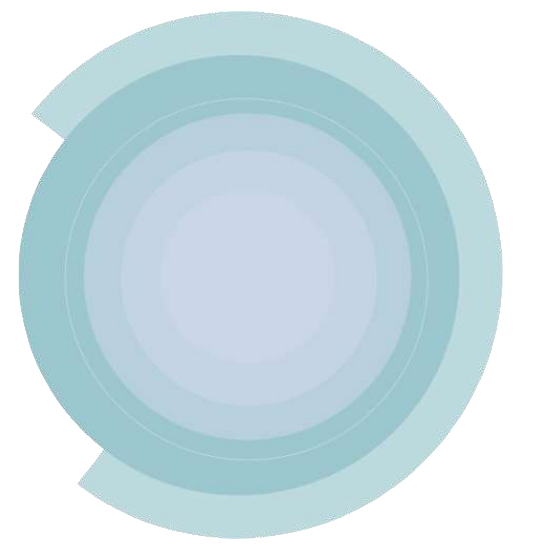
**Greenlight:** 05/13/2026

**Deployment:** 05/17/2026

## POST RELEASE

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

# Upcoming Outreach Efforts



## **ABAWD Updates (26.05 Release):**

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

Resource Updates:

- Job Aid
- Quick Guides
- Web Based Training

## **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:

- **All County Staff** – April 15 (9:00 AM – 12:00 PM) and April 21 (1:30 PM - 4:30 PM)
- **Office/Unit Management** – April 15 (1:30 PM – 4:30 PM) and April 21 (9:00 AM - 12:00 PM)
- **County Administration** – April 16 (1:30 PM – 3:30 PM) and April 28 (9:30 AM - 11:30 AM)

Resource Updates:

- Job Aids
- Quick Guides
- Web Based Training

# Adjourn Meeting