

JPA Board of Directors Meeting

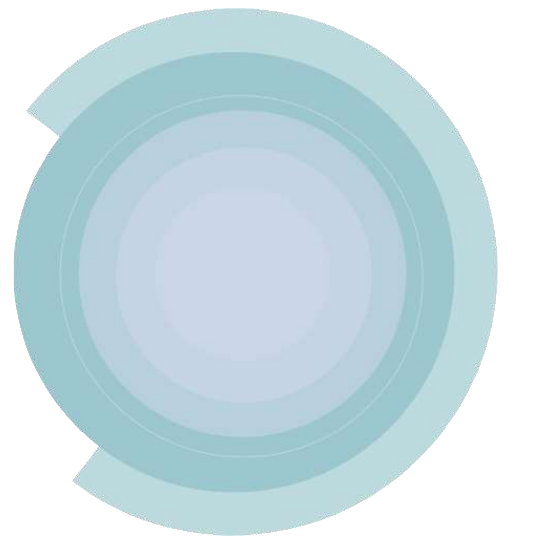
July 17, 2026



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 June 26, 2026, joint meetings of the JPA Member Representatives and Board of Directors.
- b. Approval of CBIZ CPAs and Marcum Technology Agreement for SOC 2 and NIST 800-53 auditing services.
- c. Approval of Memorandum of Understanding (MOU) between CalSAWS and Equifax for the exchange of client data to facilitate employment and income verification.
- d. Approval of Memorandum of Understanding (MOU) between CalSAWS and Truv for the exchange of client data to facilitate employment and income verification.

Action Items



4. Approval of Consent Items:

- e. Approval of Gainwell Central Print Change Order 6, which includes six (6) premise items.
- f. Approval of Gainwell Infrastructure Change Order 10, which includes four (4) premise items and ten (10) county purchases.
- g. Approval of Deloitte M&E Change Order 10, which includes seven (7) premise items and three (3) county purchases.
- h. Approval of Deloitte Portal Mobile Work Order 24, which includes six (6) premise items.
- i. Approval of ClearBest QA Work Order 1, which includes Fourteen (14) premise items.
- j. Approval of Accenture BenefitsCal Change Order 1, which includes two (2) premise items.

Informational Items

Innovation Introduction

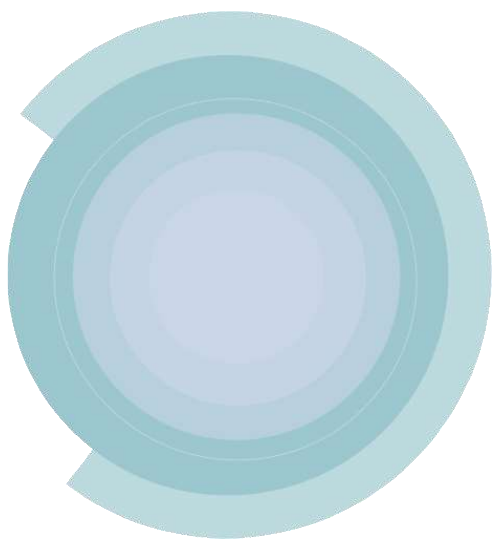
Reviving the CalSAWS Innovation Process

- M&E and Infrastructure Contracts include scope to research and review innovation ideas
- Review innovation process with counties in upcoming roadshows
- Present framework for selecting the best and most impactful innovations with county involvement
- Recruit Innovation Panel members from the counties
- Share ongoing timelines for contributing ideas into the innovation process
- Report back to PSC and JPA



Workload Management

Workload Management Redesign



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

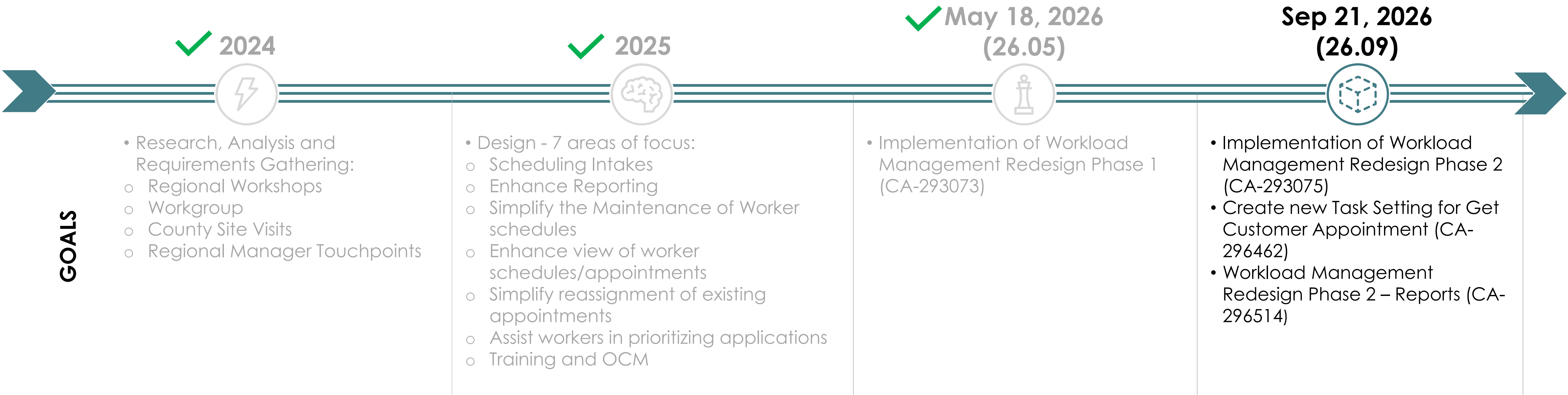


Representation: **44** counties; **6** regions; and CalSAWS leadership

- **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



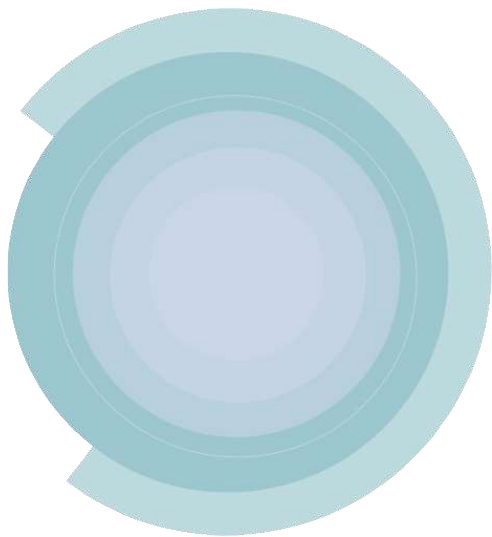
Timeline and Goals:



GOALS

Workload Management Phase 1 Retrospective

Successes and Opportunities



WHAT WORKED

- Strong cross-functional collaboration across Consortium, QA, OCM, Training, and County partners
- Workgroup facilitation, preparation, and communication were disciplined, which kept discussions focused and productive
- County engagement was high, with active participation, thoughtful questions, and constructive feedback throughout the process
- Trainings and demos helped reinforce readiness
- Post-release office hours and rapid defect resolution addressed issues quickly and stabilized the release

IMPROVEMENT AREAS

01
SCR Size and Complexity

Large and/or high-impact SCRs create avoidable delivery and adoption risks.

Recommended action: Set standards and guidelines for significantly large or impactful SCRs to break them into smaller phases or pilot functionality, with clear decision gates before broad rollout.

02
OCM and Training Timing

Late OCM preparation limits the ability to prepare effectively for major changes.

Recommended action: Initiate OCM and training planning earlier in the project lifecycle to provide sufficient time for the development of organizational change management and training materials.

03
Testing Complexity and Alignment

Significantly large SCRs can create testing complexity and misalignment between documentation and build, resulting in late-identified defects that increase rework and delay stabilization.

Recommended action: Reduce SCR size to reduce complexity, align documentation, and validate scenarios earlier to reduce defects.

04
County Change Load

Large volumes of change in a short timeframe make it difficult for users to absorb, apply, and adopt new functionality quickly.

Recommended action: Sequence changes more deliberately through phased rollouts and provide earlier access to materials, demos, and feedback cycles to allow time for adoption of changes.

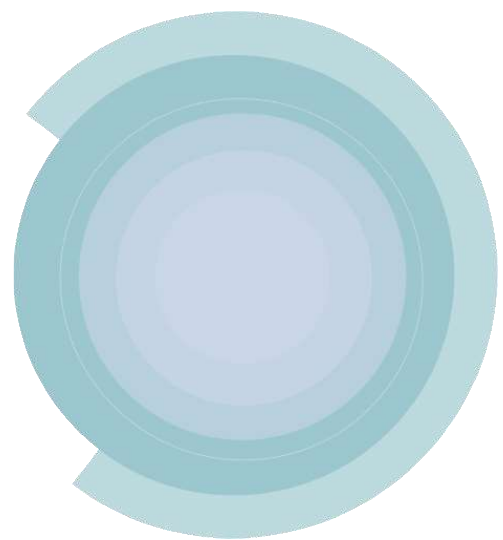
Policy and Release Update

CMS Interim Final Rule (IFR) Update

- CMS released the Interim Final Rule (IFR) for the Medi-Cal Work and Community Engagement Requirements on June 3, 2026
- DHCS is assessing the IFR for impacts to the current CA implementation of the Medi-Cal Work and Community Engagement Requirements and providing policy directions to eligibility systems to come into compliance
- DHCS, CalSAWS, CalHEERS, BenefitsCal, and CWDA are working together on the IFR impacts CalSAWS, BenefitsCal, and CalHEERS 26.09 implementation
- The CalSAWS Work Requirement and Community Engagement County Workgroup will start working on the 2027 design changes resulting from the IFR starting in August 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

Risk 326

Lack of timely policy guidance may impact Medi-Cal HR 1 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.

Status: 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

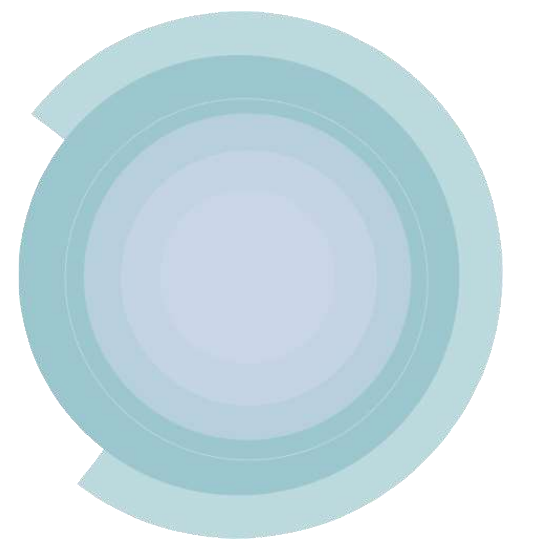
Inclusion of CMS Verify Lawful Presence (VLP) service update in 26.09 may impact ability to implement Medi-Cal eligibility system changes

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.

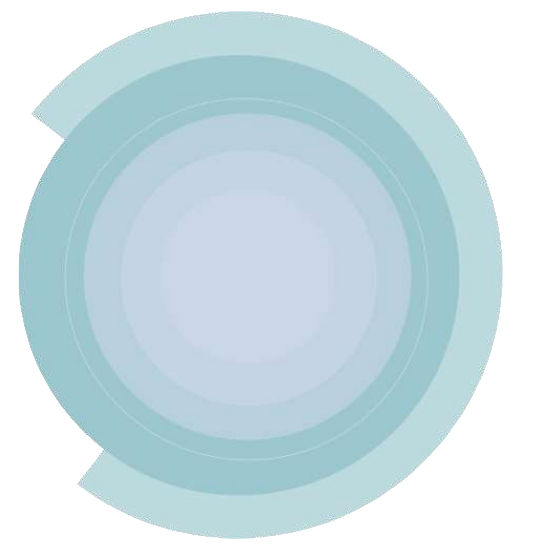
Mitigation Approach: Mitigation steps defined for planning and each SDLC Phase.

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

CalFresh May Revise & HR-1 Policy Roadmap*

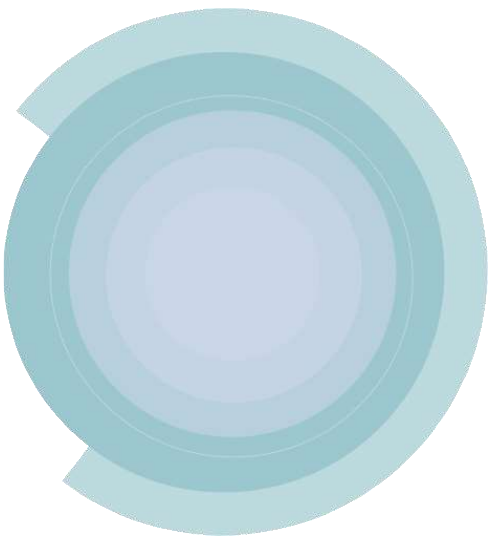


CalFresh May Revise & HR-1 Policy Roadmap*



Release Update

Upcoming Release 26.07



TESTING

System Test, QA, and County Validation are in progress

RELEASE COMMUNICATION

Major Upcoming Changes (MUC)
Draft: 05/22/2026
Final: 06/26/2026
Webcast: 06/30/2026
Newsletter and Release Notes: Week of 07/14/2026

DEPLOYMENT

Greenlight: 07/15/2026
Deployment: 07/19/2026

POST RELEASE

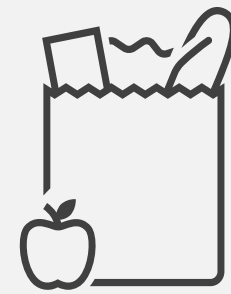
Post-Release Daily calls: 07/20/2026 – 07/22/2026

BenefitsCal Update

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)

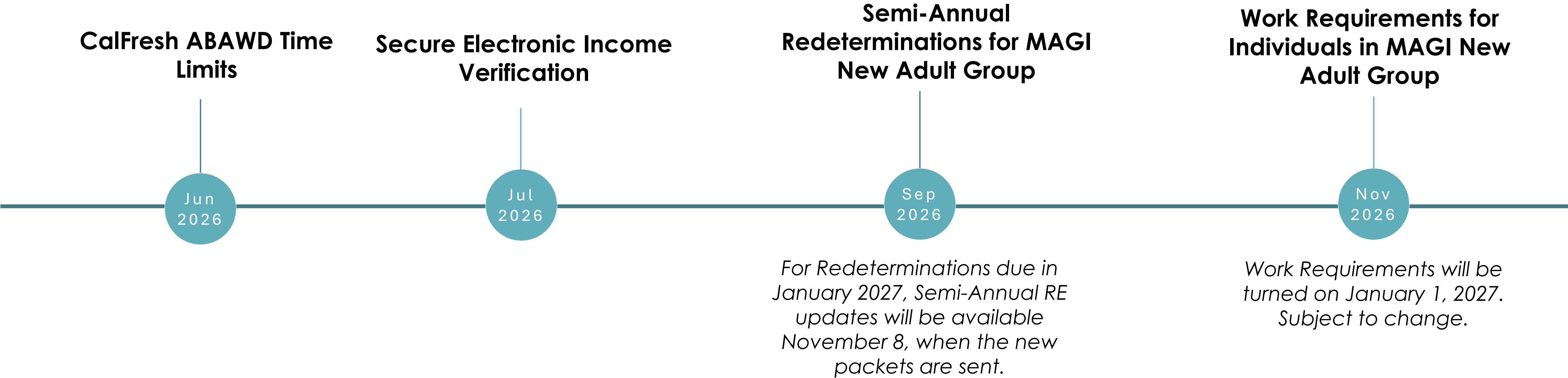
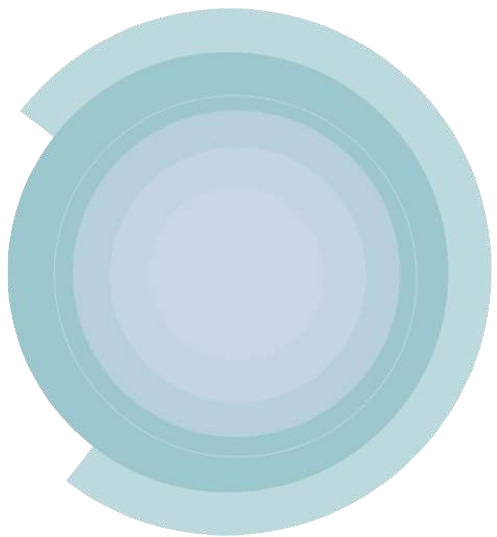
Medi-Cal



- CSPM-80312: Asset Reinstatement - Non-MAGI (25.12.21) **Released**
- CSPM-80930: Retroactive Medi-Cal Update (26.06) **Released**
- CSPM-80929: Semi-Annual Redeterminations – MAGI (26.09)
- CSPM-80928: Work Requirements - MAGI (*tentatively* 26.11)
- CSPM-81631: Cost-Sharing for Adults (2027)

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

HR 1 Timeline





CalFresh ABAWD Time Limit Exemption Screening Form was integrated into the Apply for Benefits flow for easy reporting of work requirement and exemptions.

Applicant fills out a few extra screens while applying for CalFresh.

BenefitsCal submits a CF Time Limit Exemption Screening Form for every ABAWD with information to report.

The first screenshot, titled 'Work Requirement', asks 'Are you doing any of these work, volunteering, or training activities?'. It provides instructions: 'To get CalFresh benefits for longer, ABAWDs are expected to work, volunteer, or participate in education or training programs for at least 20 hours per week or 80 hours per month. They can also be excused from this requirement with an exemption.' Below this are two dropdown menus: 'Who is an ABAWD?' and 'Why should I fill out the details below?'. A section titled 'Select all that apply to you.' contains three checkboxes: 'Working' (with details on self-employment, contractor work, or in-kind work), 'Doing community service or volunteer work' (with examples like school or nonprofit), and 'In a work program or an education or training program'.

The second screenshot, titled 'Exemptions', asks 'Do any of the situations below apply to you?'. It states: 'If any of these situations apply to you, then you may qualify for an ABAWD exemption.' Below are two dropdown menus: 'Who is an ABAWD?' and 'Why should I fill out the details below?'. A section titled 'Select all that apply to you.' contains three checkboxes: 'Has a physical or mental health issue that makes it hard to work', 'Has a personal issue that makes it hard to work', and 'Is caring for a child under age 6'.

Work Requirement

Exemptions



For active cases, the CalFresh ABAWD Time Limit Exemption Screening Form and other ABAWD requests can be sent to the county using Support Requests

The screen is titled 'What help do you need with the CalFresh ABAWD Time Limit? (required)'. It explains: 'You can request support for yourself or another ABAWD in your household. If you need other help with the CalFresh ABAWD Time Limit, please contact your county office.' Below this are three radio button options: 'I want to request an exemption.', 'I want to share how I'm meeting the ABAWD work requirement.', and 'I want to request a review or correction of my time limit history.'

Release Date: 04/30/2026

Effective Date: 05/15 for Renewals and 06/01 for Apps



Customers can easily notice and track their CF ABAWD Time Limit on their Dashboard

CalFresh ABAWD Time Limit for Current Statewide Period

January 2023 to December 2025

John Doe (36)

1

Countable Months Used

2

Countable Months Left

You can use up to 3 countable months of CalFresh in each statewide 36-month period. To keep getting CalFresh benefits for longer you need to:

- Have an exemption, or
- Meet the work requirement.

[Request an exemption or share how you're meeting the work requirement.](#)

If you used a countable month for reasons outside of your control, [reach out to your county worker](#) to see if you may qualify for "good cause."

[View our FAQs about the CalFresh ABAWD Time Limit.](#)

[VIEW TIME LIMIT DETAILS](#)



Helpful information tips explaining ABAWD policy

? Who is an ABAWD?

ABAWD stands for Able-Bodied Adult Without Dependents. An ABAWD is a person on CalFresh who:

- Is between the ages of 18 and 54
- Is able to work at least 20 hours per week or a total of 80 hours or more per month
- Doesn't live with children under 18

To get CalFresh benefits for longer, ABAWDs are expected to work, volunteer, or participate in training programs for at least 20 hours per week or 80 hours per month. They can also be excused from this requirement with an exemption.

Your county worker will provide more information during the interview.

? Why should I fill out the details below?

As an ABAWD, you can only get CalFresh benefits for 3 months in each statewide 36-month period unless:

- You're working, volunteering, or participating in training programs, or
- You have an exemption that excuses you from working.

If you're doing at least one of these activities for 20 hours per week or 80 hours per month, you'll meet the work requirement. This means you can keep getting CalFresh benefits for longer than 3 months.

Your county worker might request proof for these situations later. Don't worry! If you can't get the proof, your county worker will help you.

Release Date: 04/30/2026

Effective Date: 05/15 for Renewals and 06/01 for Apps



Introduced as a helpful and trusted option for data entry



You can log into your payroll for this job

[Need help?](#) [How it works](#)

- Enters your current income instantly
- Gets your paystubs once you connect
- Can be used for many popular employers

Requires customer consent



Reduces manual entry by pulling information directly from payroll portal



12

Step 4 - Income

Here's what we got from for Home Depot.

John Doe (36)

Employer's Name	Home Depot
Employer's Address	123 Tool St
City	Sacramento
State	California
Zip Code	95252
Employer's Phone	--
Pay Frequency	Monthly
Amount	\$300.00
Average Hours per Week	--



Automatically sends pay stubs, reducing need for document upload

Payroll

Home Depot	John Doe (36)
Monthly	\$300.00

We got your pay stubs from the verification system. These will be sent to the county:

 Jan 24 2025_Home...pdf

[Preview](#)

 Feb 21 2025_Home...pdf

[Preview](#)

 Mar 21 2025_Home...pdf

[Preview](#)

 Review

 Remove

Release Date: 07/19/2026



Allows applicant to submit Renewal for multiple household members in the same group by completing flow only once



Informs applicants in-context if their Renewal frequency has changed



Enables applicant to report Medi-Cal Work Requirement information within the Renewal and Application flow



The e-Application and Renewal information transfers to CalSAWS so worker can determine if applicant has already met or can be excused from the Medi-Cal Work and Community Engagement Rule



Informs applicants of their current Work Registration Status

Release Date: 09/30/2026

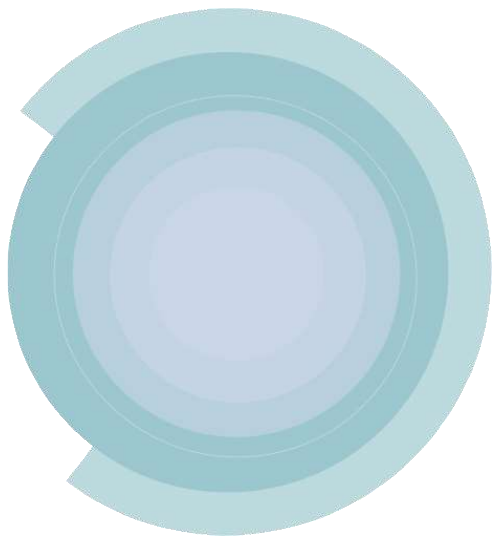
Effective Date: 01/01/27

Foster Care Eligibility Determination (FCED) Update

Production Simulation

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

Start Date	Current Status
June 22, 2026	In Progress



By the Numbers

467

County Staff onboarded

7

Total Sessions held for Project Team support of County Testers

88%

AAP Cases known to CARES and CalSAWS are pre-linked

91%

Kin-GAP Cases known to CARES and CalSAWS are pre-linked

77%

Foster Care Cases known to CARES and CalSAWS are pre-linked

Looking Forward

- ❑ Support of CARES ILT Training both systematically and functionally
- ❑ Provide CARES PPOC Information to CalSAWS County staff
- ❑ Case Link refresh in August; timelines and County comms discussions are in progress



Risk 324

Delay in communication may impact CalSAWS participation in the Production Simulation activity prior to go-live

Risk: 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:

- Prod Sim - county executions officially began 6/22
- Case Links enabled and shared with the Counties as a testing resource
- CalSAWS requested participant POCs, county wise, from CARES to share with the county staff for collaboration during Prod Sim. CARES evaluation is in progress.
- This risk remains open for continued monitoring and tracking against production simulation activities.

Risk 334

Lack of transmitting foster care vendor information to calsaws increases county vendor maintenance

Risk: Placement updates are tied to vendor/resource that does not include a unique identifier. Because of that, when vendor/resource information is updated, it can apply to multiple placements tied to that same vendor/resource, causing duplicate or unintended updates. Proposed solution: The development of a Vendor API would include a unique CalSAWS Vendor/Resource ID. That ID would act as the matching link, so updates would apply only to the correct placement, avoiding duplication. This risk applies to 57 counties and excludes LA.

Mitigation Actions: Vendor (Resource) are communicated via the Placement API, and users will request maintenance or add of resources through existing communication approach. Risk remains open to track the strategic solution for receiving vendor API information for the 57 counties post v1, post October go-live.

FCED OCM Activities

FCED OCM activities remain actively underway, with ongoing communications, stakeholder engagements, and system demonstrations. OCM focus is gradually shifting toward a go-live readiness preparedness.



Communications

- Monthly Bulletins
 - Newsletters



System Demonstrations

- Demo Series 1- April-May
- Demo Series 2- June- Current (Next Session July 22nd (Security and Tasks)



Resource Materials

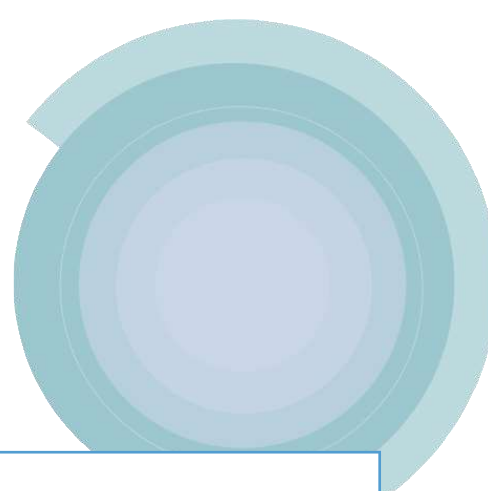
- Job Aids
 - WBTs
- Quick Guides
 - Other

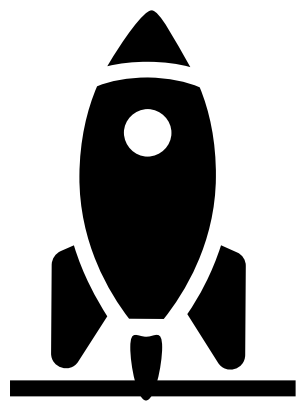
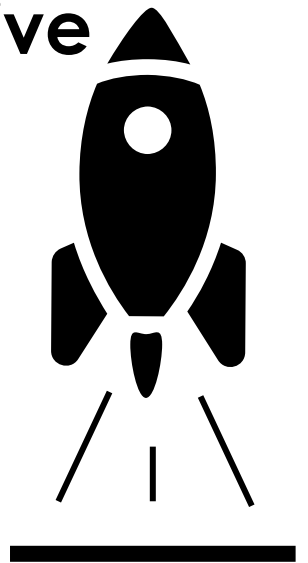
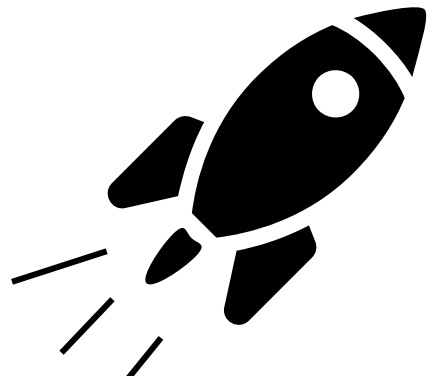
Go-Live Readiness Survey

- Will be delivered to County PPOCs and RMs mid-July to gather feedback to evaluate awareness, understanding, preparedness, and confidence related to the FCED implementation
- Survey results will be analyzed to identify opportunities for targeted interventions, including additional communications, engagements, and outreach

Implementation Support

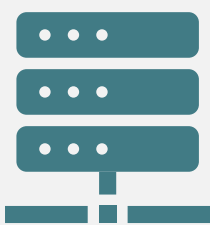
Pre- and Post-Go-Live Activities of the Project Team and the OCM Team



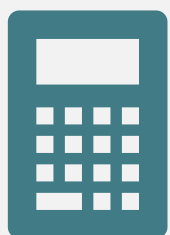
Phase	OCM Support	Project Team Support
Pre-Go-Live 	✓ Deliver targeted go-live communications ✓ Update OCM materials based on County Feedback	✓ Support county admins with security access setup ✓ Complete task configuration setup ✓ Configure Tier 3 Assignment Group in ServiceNow to route CARES-related incidents appropriately
Go-Live 	✓ Support adoption readiness through final communications and reinforcement of key processes	✓ Validate critical scenarios for FC, AAP, and KG ✓ Conduct scheduled Smoke Testing after deployment with CARES
Post-Go-Live (Hypercare) 	✓ Host daily office hours for 1-2 weeks* after go-live – separate from defect reporting ✓ Moderate County questions on functionality, resources, and usage guidance <i>* After two weeks, the OCM team will assess if additional office hours are needed</i>	✓ Provide Hypercare bridge support for 2-weeks post go-live (Mon-Wed) ✓ Run daily defect triage and issue resolution ✓ Maintain open support channels with the CARES project team for critical defects and issues

Mitigation Plans

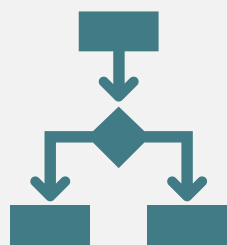
If CARES is not ready for go-live, CalSAWS operations and benefit issuance will continue through existing processes and interim workarounds.



Staff can obtain the necessary information from their child welfare partners and manually enter it into CalSAWS, as they do today



The FCED API implementation does not change CalSAWS eligibility determinations, benefit calculations (EDBC), correspondence generation, or benefit issuance processes.



The last accepted and saved EDBC will continue to be used to issue Foster Care, Kin-GAP, and AAP benefits until a new EDBC is run.

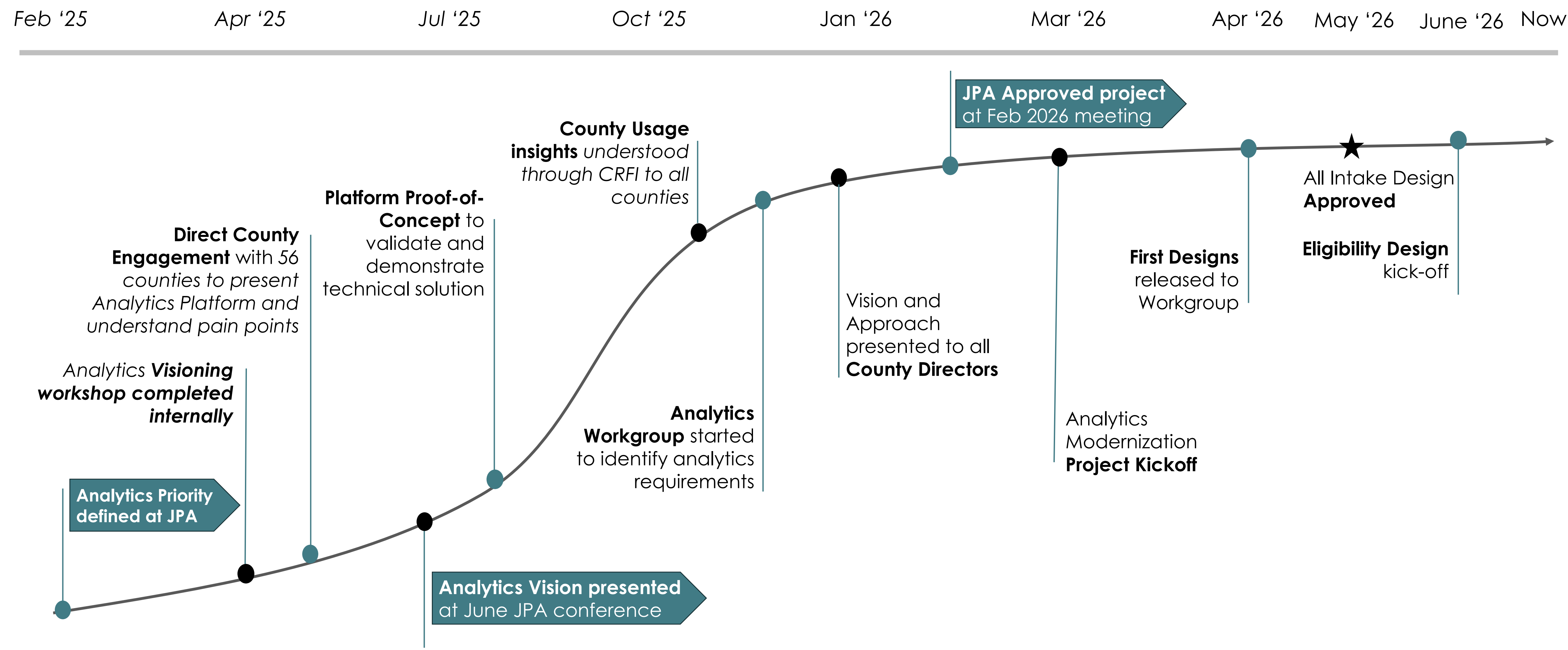


The project team is working with Los Angeles County to continue using the DCFS Data Mart interface processes to CalSAWS, as they do today, in the event FCED APIs are unavailable at go-live.

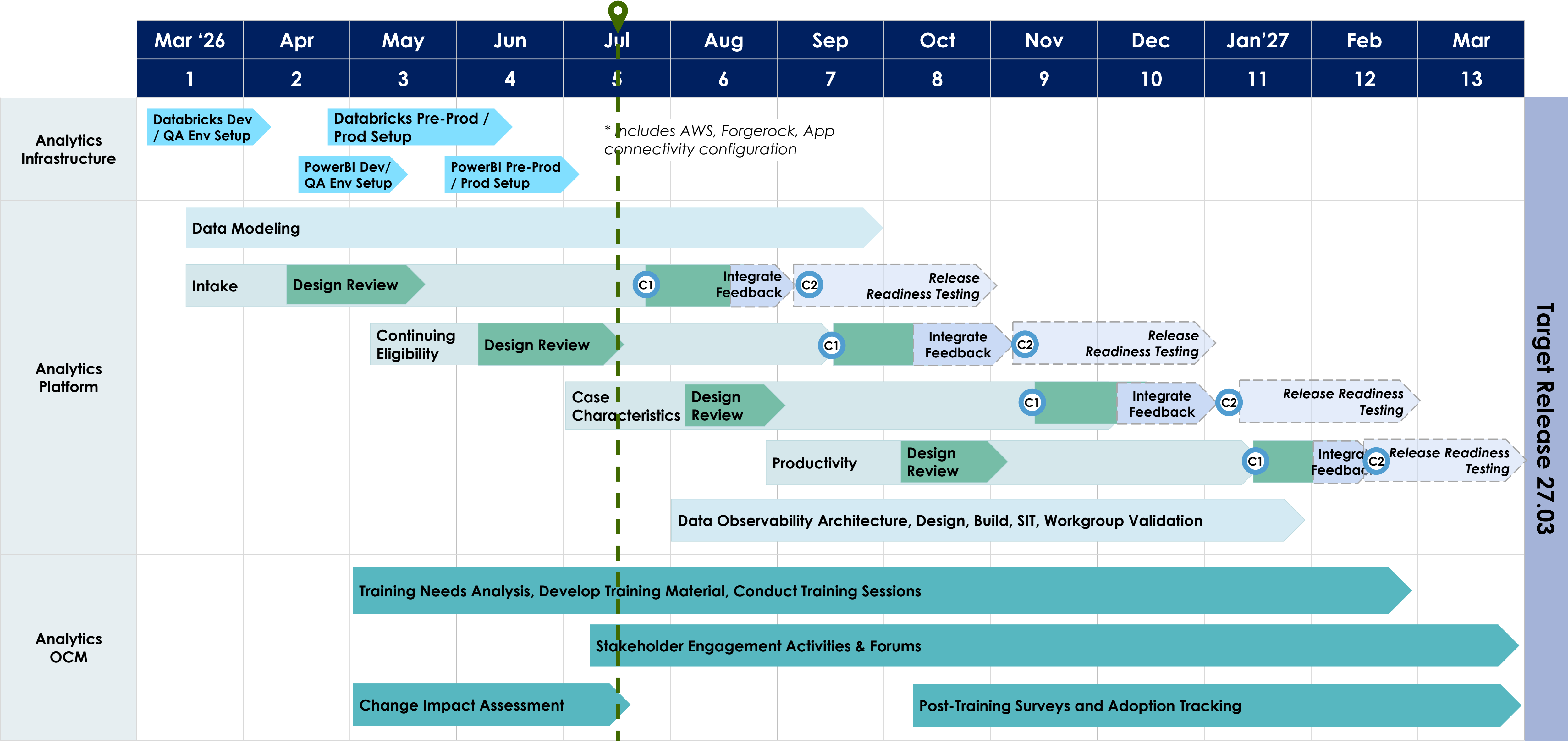
Data & Analytics Update

Laying the Groundwork for the Analytics Platform

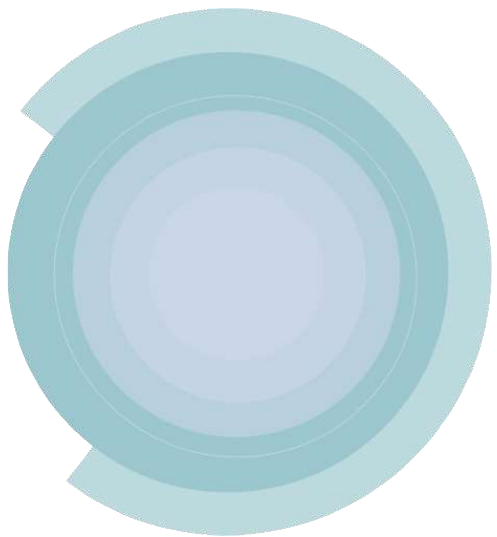
Several **targeted actions taken last year starting Feb 2025** to ensure implementation is set up for success. Broad **county engagement reveals strong support and excitement** for the new Analytics Platform



Phase 1 Execution Timeline



Subject Area – Sprint Status



Design and Development work for the **Intake domain** is **100% complete**,
County Preview for Intake Domain is planned for late July

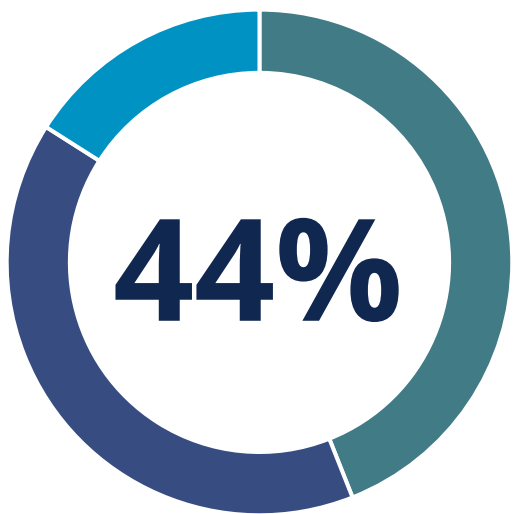
Continuing Eligibility Domain began on May 29th

Domain	Sprint	Status Details
Intake	Design	100% Complete
	Development	100% Complete
	Test	75% Complete
Continuing Eligibility	Design	50% Complete
	Development	45% Complete
	Test	Not Started Yet

County Engagement: Intake Module

363

Total Responses
across **6 Regions**

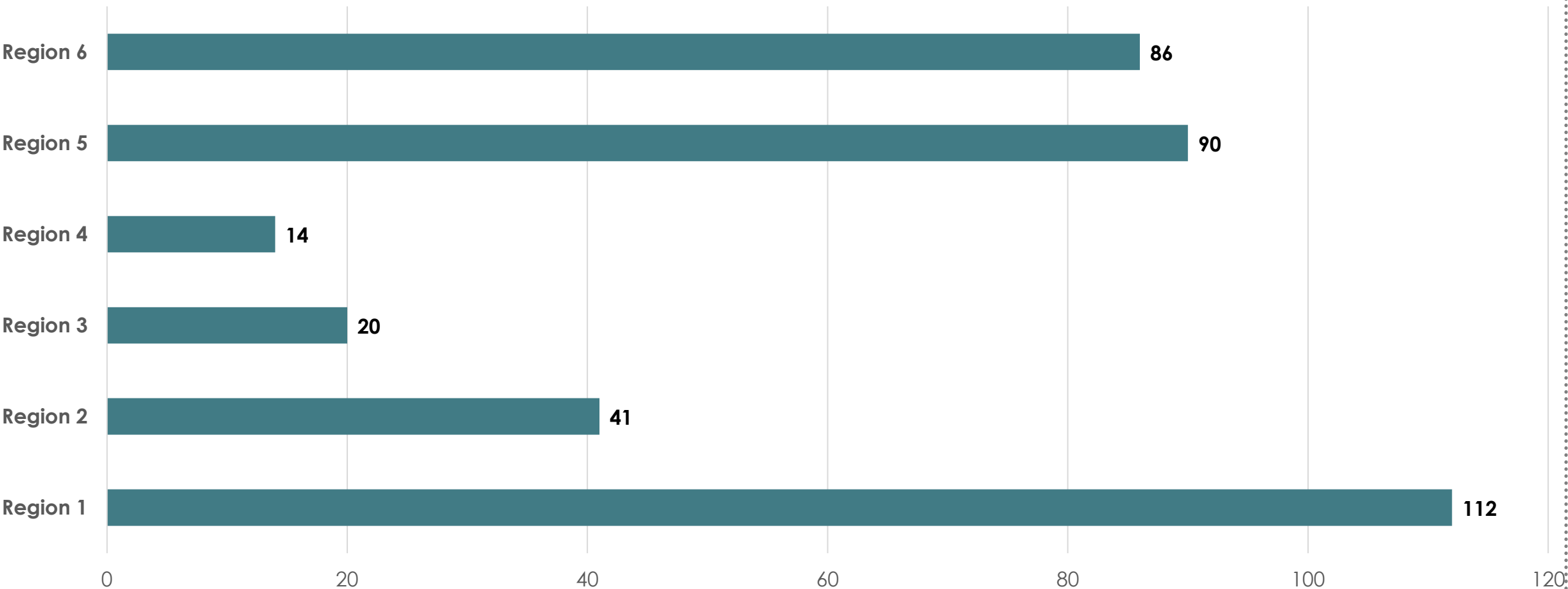


Most responses from Business
Analysts across **6 Regions**.

21

Total workgroup
sessions conducted

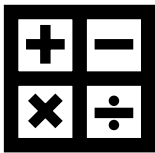
Region Responses by Dashboard



Types of Suggestions



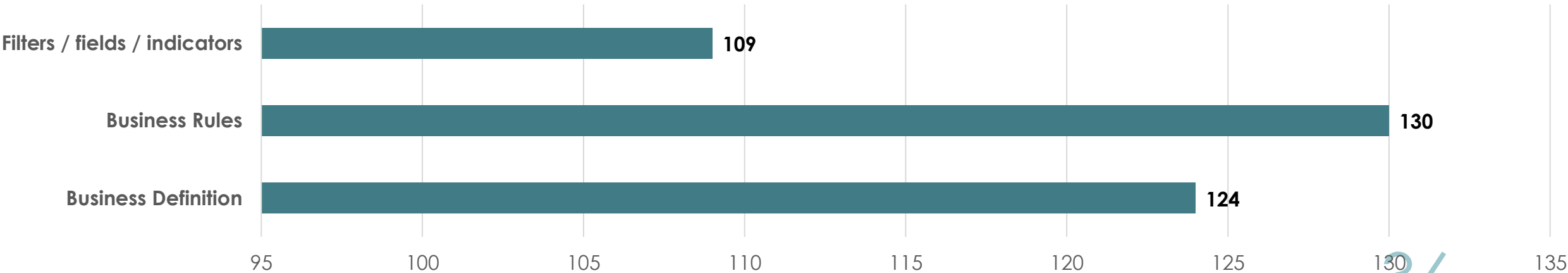
Filters / Fields / Indicators: Users want additional data elements, filter, flags for specific types of cases, clearer chart/table labels, and easier movement from summary to detail records.



Business Rules: Discussions on how totals, percentages, and status are calculated ensuring aligned with business needs.



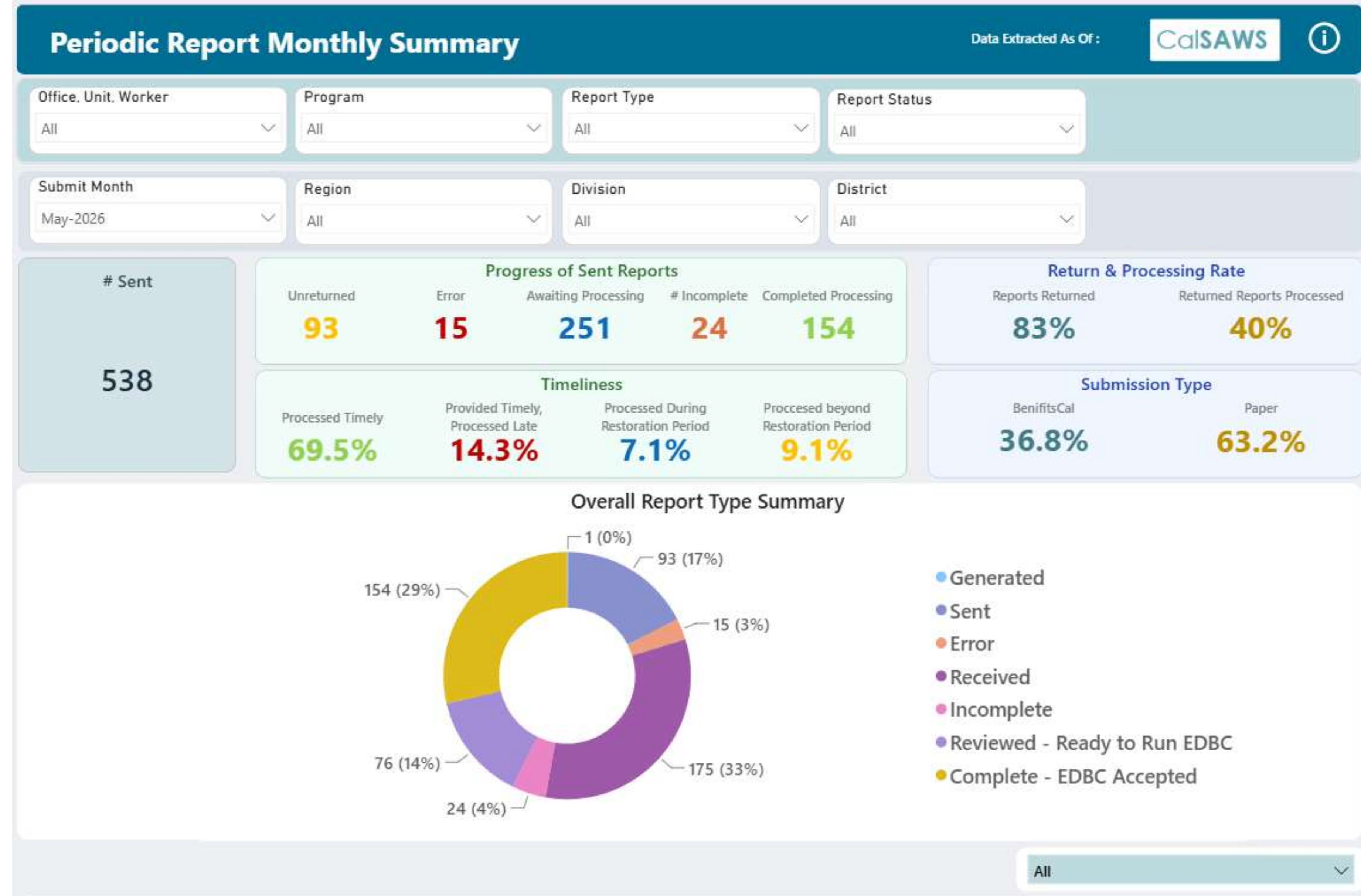
Business Definition: Examples include calendar vs. business days, program-specific due dates, overdue definitions, aging buckets, and whether the design aligns with regulations and county practice.



Sample – Periodic Report Monthly

At a Glance:

- How many reports are outstanding?
- What are my timeliness and processing rates?
- What is the rate returned?
- How were the reports submitted?
- Identify issues immediately
- Filters allow quick drill down



Sample – Pending Applications

At a Glance:

- How many pending applications does my county have?
- How many applications are overdue?
- How many need to be processed today?
- Narrow down by program, application source, unit, etc.
- Identify issues



Risk 332

Limited County review capacity may impact Analytics Modernization Delivery Schedule

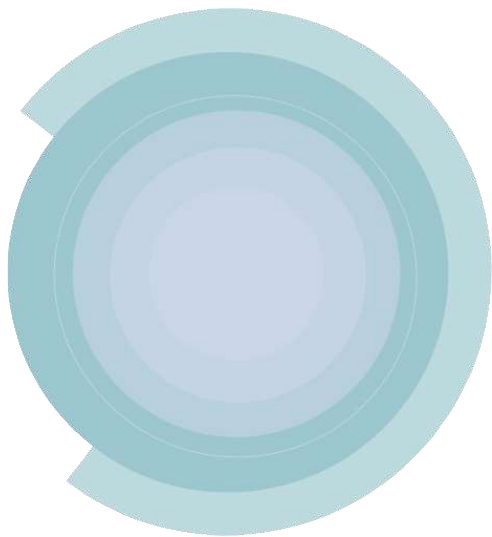
Risk: The Analytics Modernization project timeline requires county users to actively participate, review designs, and complete validation at a cadence of ~10–15 reports per week. If this review capacity is not maintained due to limited availability or delayed feedback cycles, development and release timelines may be impacted.

Mitigation Approach:

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

Analytics Workgroup Representation

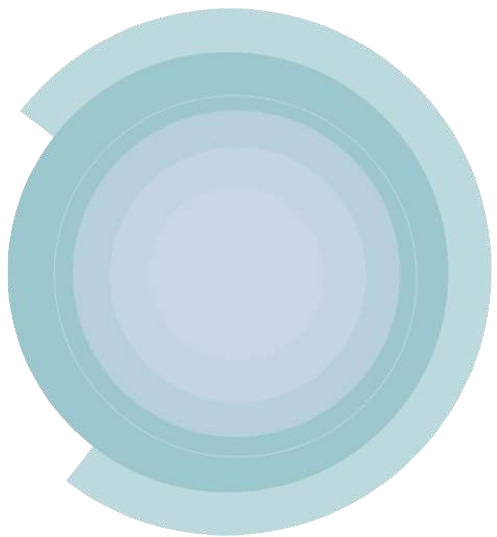
Diverse Personas represented across regions



	Region 1	Region 2	Region 3	Region 4	Region 5	Region 6
Executive Representative	Executive Sponsor – PSC Member Napa County; Director Contra Costa 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 Note: includes representation from DPSS and DCFS
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 Action Items



Action Item	Owners	Timeline	Current Status
Plan analytics demonstration sessions for directors and look into partnering with CDSS.	Jerry Nielson Sandeep Aji	ASAP	In conversation with CDSS on the collaboration approach.

Infrastructure Update

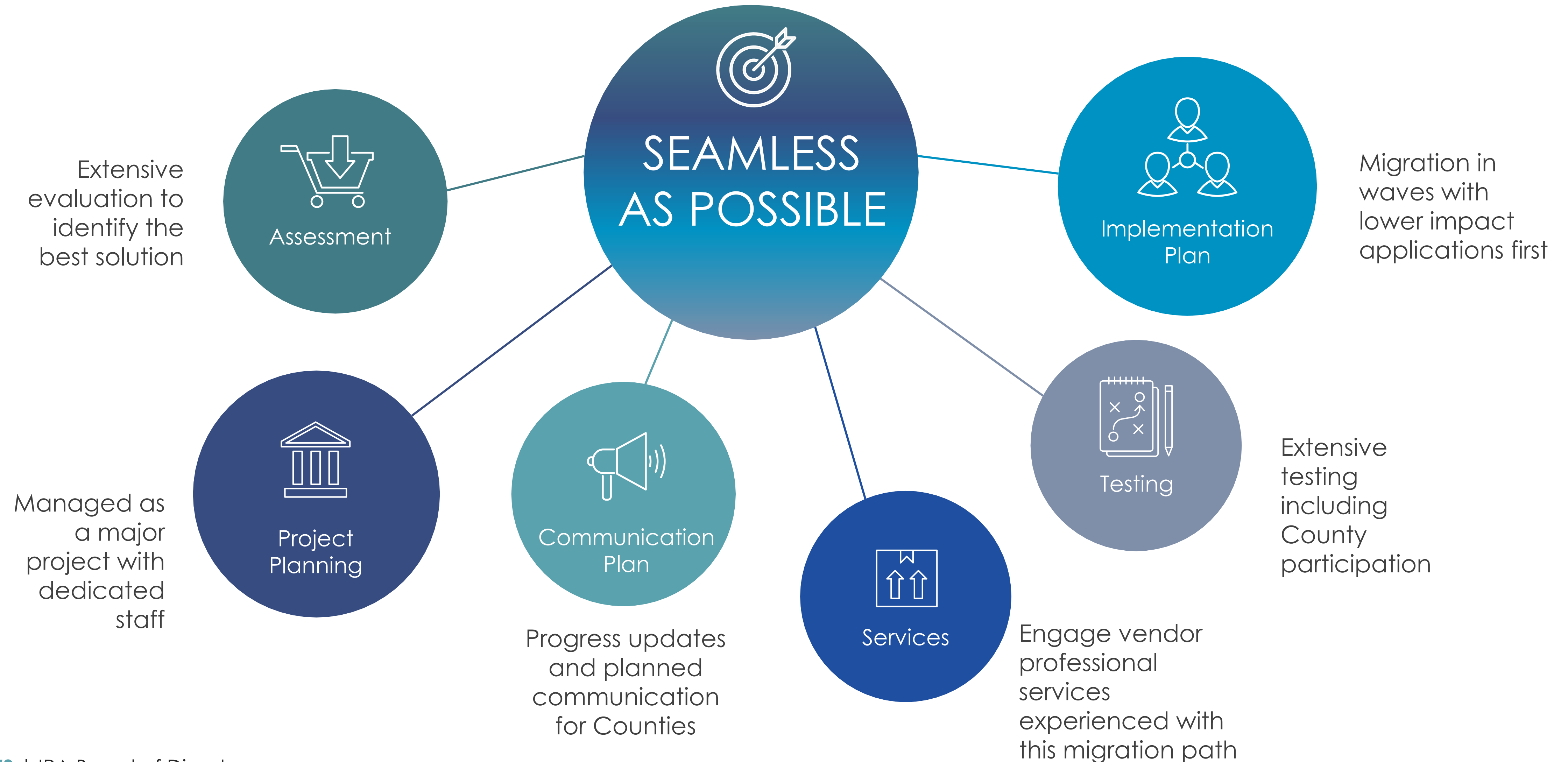


Identity and Access (IAM) Management

IAM Replacement

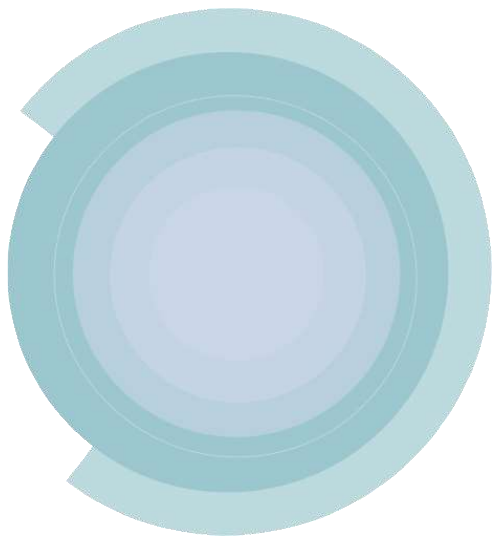
Objective

**Major change required
regardless of solution**



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
December 21, 2026



Wave 1

Tools - Non-Production

Wave 3

CalSAWS – Staging
Tools – Production
Shared Services –
October 24, 2026

Wave 5

BenefitsCal - Production
January 10, 2027

Tools includes Jira, LMS, ServiceNow

IAM Replacement

Project Watch Items

Change Management and Non-Technical

- **Delegated Administrator Changes**
 - Identifying changes and developing training materials
- **Awareness of the Upcoming Change and Determining if Other Changes will Occur**
 - Communication at JPA/PSC and Regional meetings
 - Conducting Discovery workshops to identify user journeys and verifying if any changes are needed

Technical

- **Workflow License - COMPLETE**
 - Timing of the need for the workflow license may be earlier than originally expected
 - Escalated to Okta management
- **Testing**
 - Thorough functional testing needed
 - Coordinating with M&E and BenefitsCal partners to identify testing plans for applications

Risk 338

Replacement of Identity Access Management Solution

Risk:

If user journeys are not effectively identified, implemented and tested, and the mitigation plan is not effective, users could experience access issues to systems that are authenticated using the CalSAWS IAM.

Mitigation Actions:

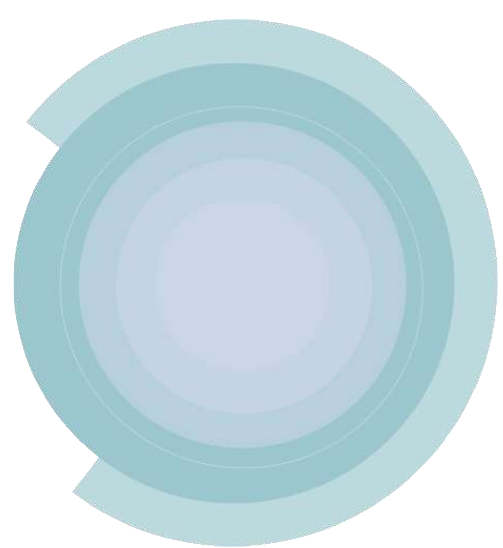
1. Constructing a detailed project plan to include testing for each system across the CalSAWS vendor partners
2. Engaging multiple stakeholders in Discovery workshops to identify user journeys to inform the project plan and inform the other vendors
3. Extending the testing period to provide additional time for CalSAWS core system and BenefitsCal
4. Determining the rollback plan in the case of unexpected significant problems.



Hyland Upgrade

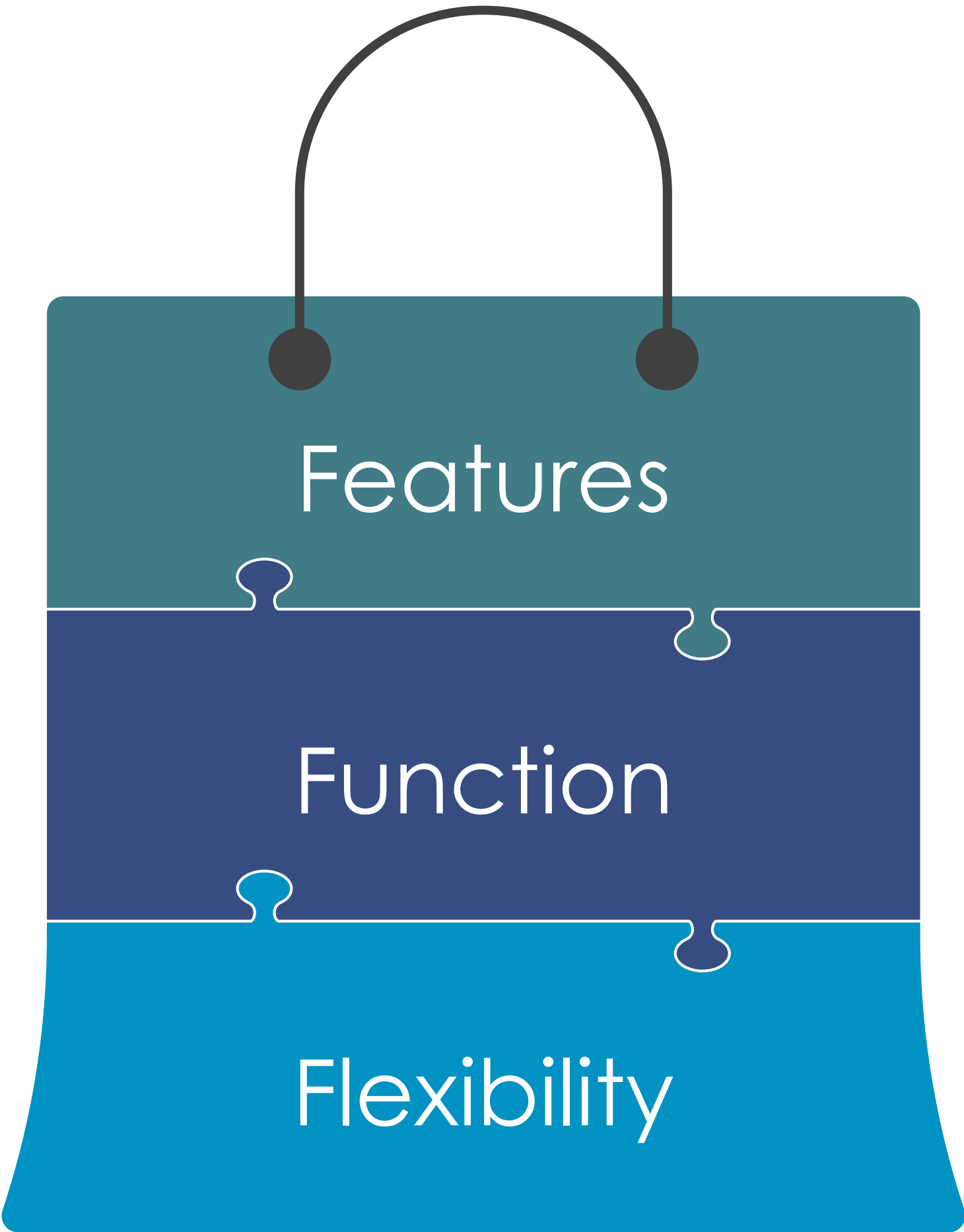
Hyland Perceptive to Hyland Titan

Why Change?



Major upgrade to the new product is required

Increased Functional Expansion
Increased options for expanding integrations and workflows

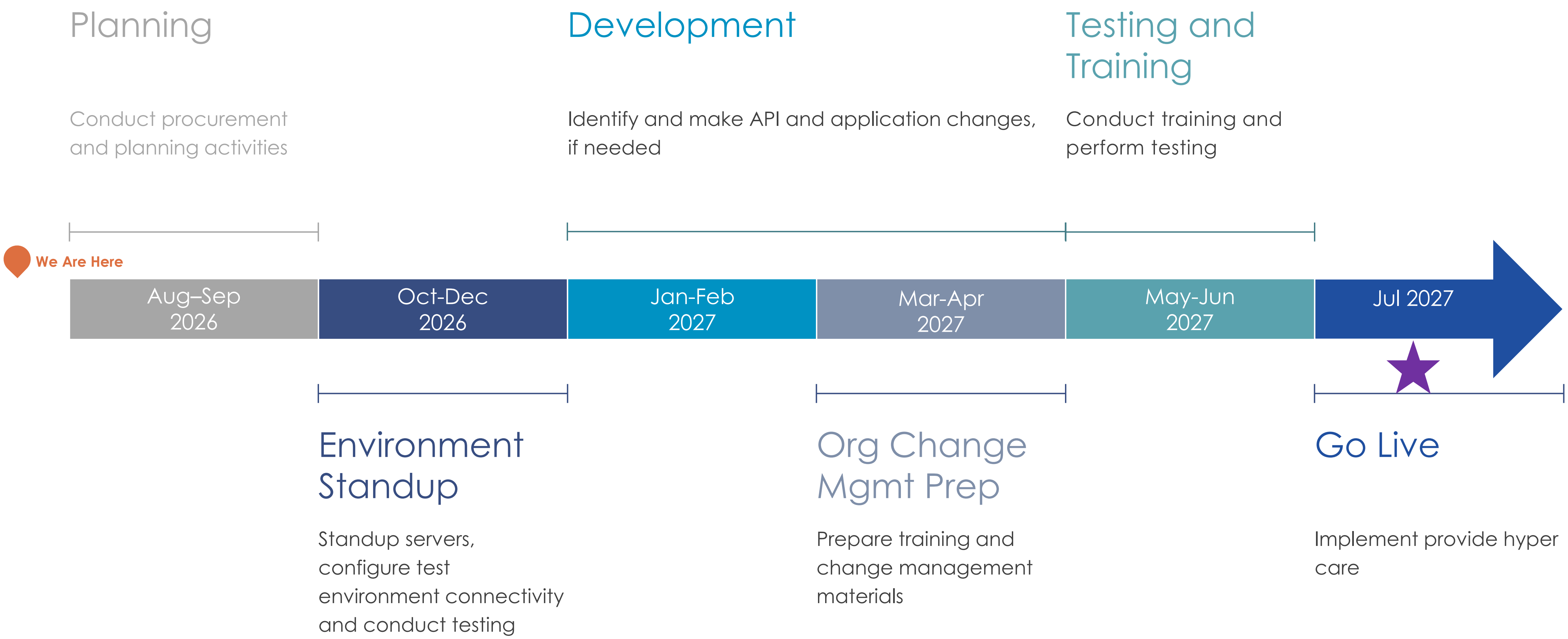
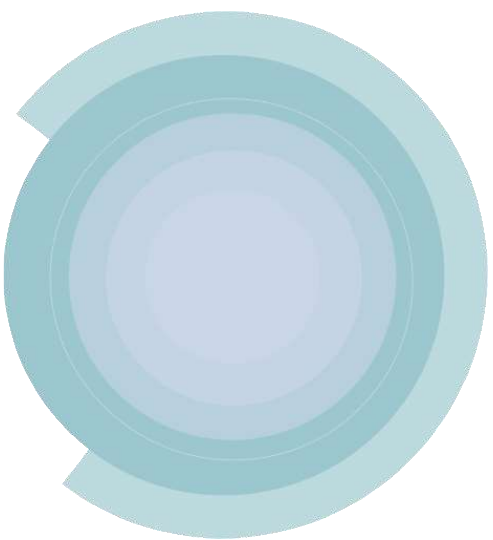


Access to Advanced Features
Intelligent Document Processing becomes available

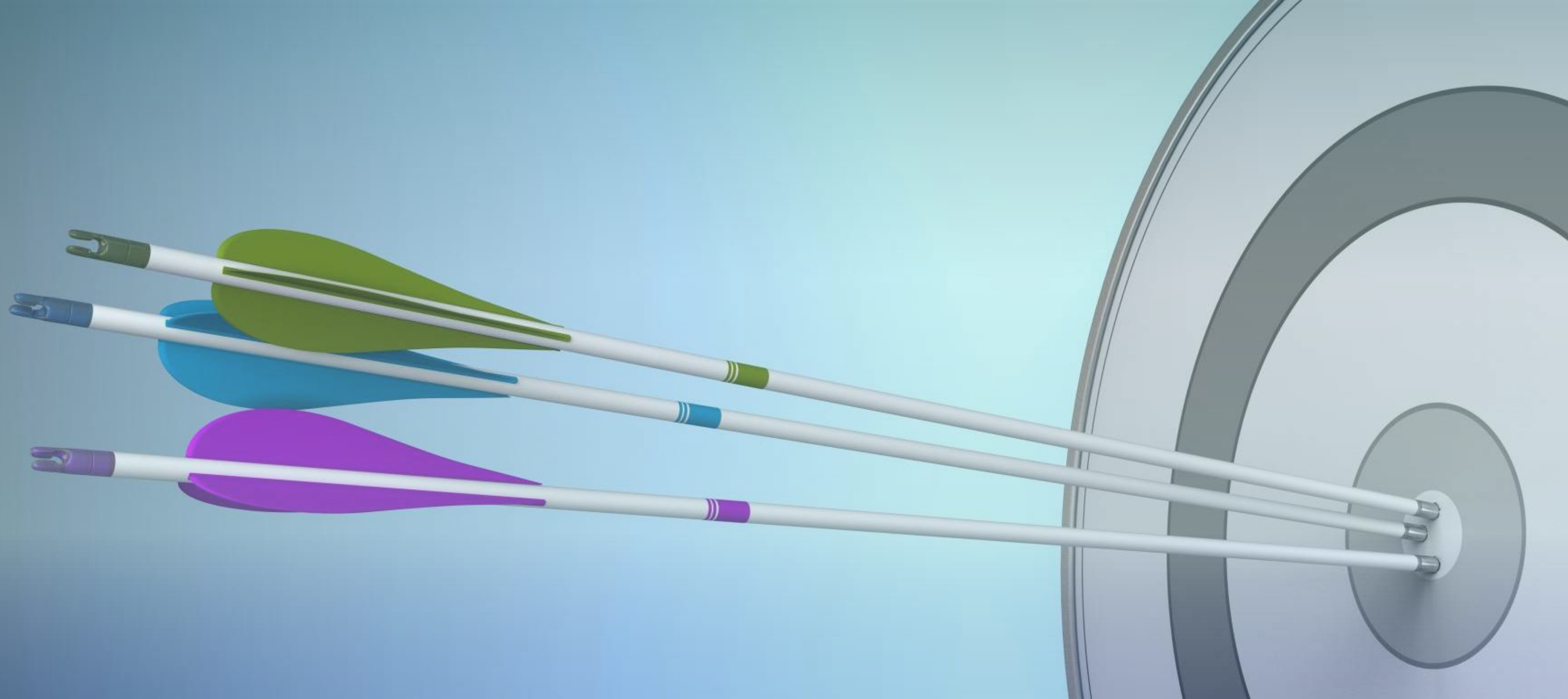
Increased Flexibility
Underlying platform allows changes to be implemented more quickly

Hyland Perceptive to Hyland Titan

Timeline – Under Construction



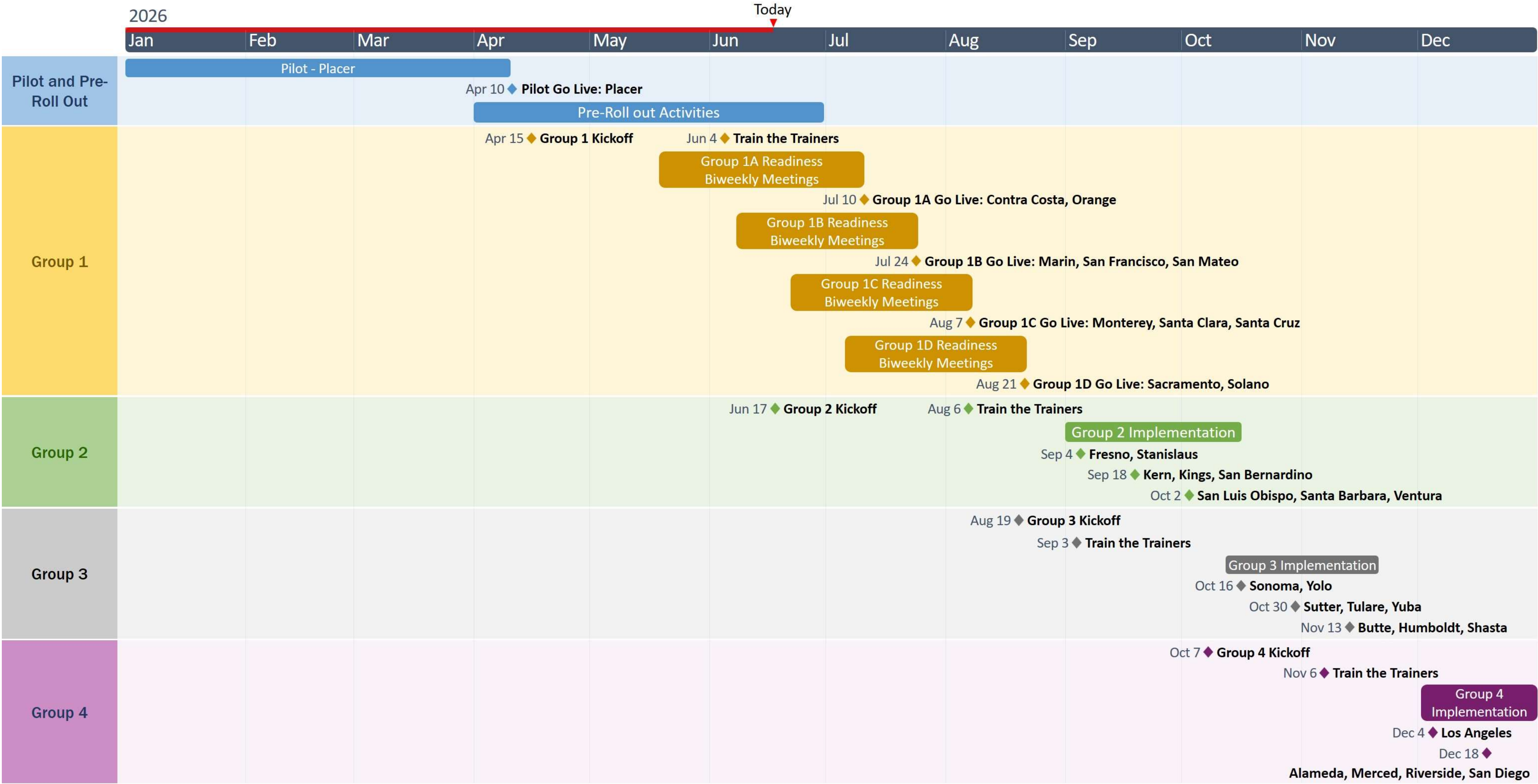
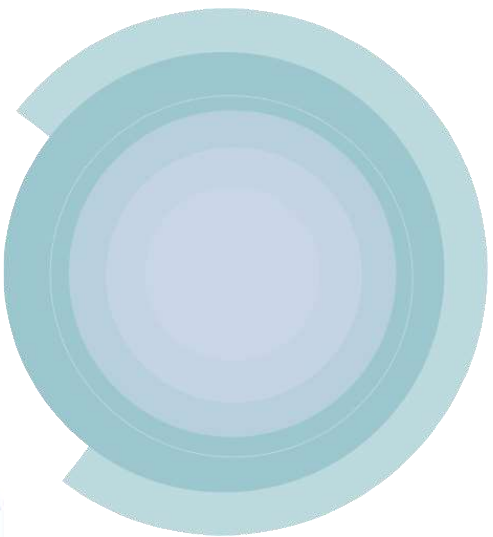
Contact Center Updates



Call Summarization

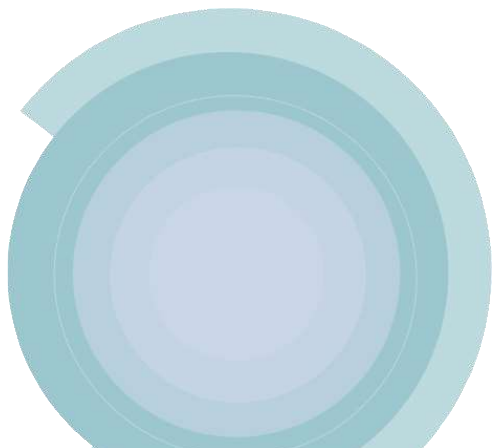
Call Summarization Timeline

Solution Path



Metrics Since Launch

Results from April 10th to July 3rd



Key Performance Metrics

Since Launch
4/10/26 Forward

14,538

Summaries Generated Since
Launch

4

Avg Generation Time
(Seconds)

100%

% Generated within 60
seconds

Percentage Time Reduction

4.25%

Reduction in ACW

5.10%

Reduction in AHT

Percentage of Content Unedited

81.25%

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.

Call Summarization

Project Watch Items

Change Management and Non-Technical

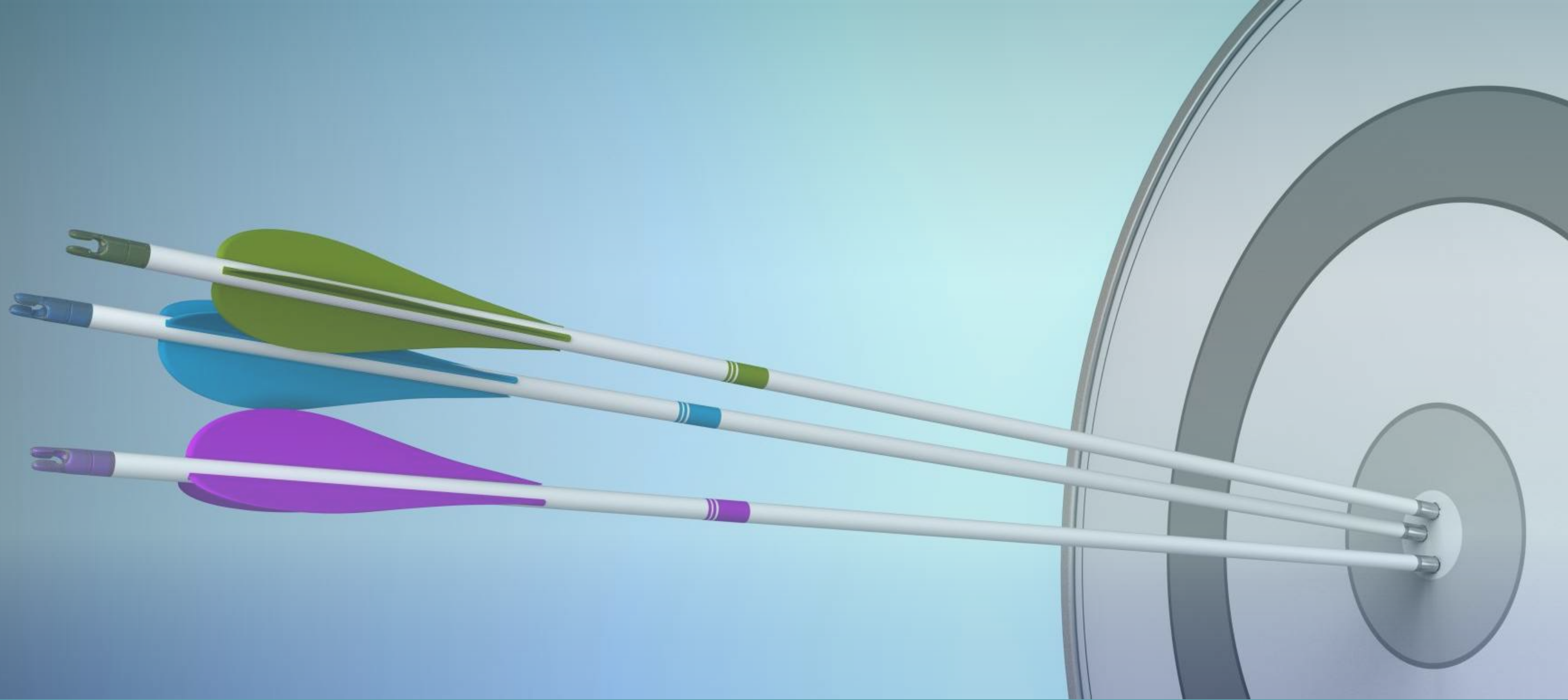
- **County Readiness**
 - See activities for pre-work in the “County Readiness Activities” area of this slide
- **Material/Session Verification**
 - Review of materials (training, readiness, etc.) and sessions post pilot and following waves for improvement as needed

Technical

- **Successful Pilot Completion - COMPLETE**
 - Functionality as expected (Based on errors identified and/or significant editing by a large number of agents)
- **Performance - COMPLETE**
 - Summaries are generated in the expected time

County Readiness Activities

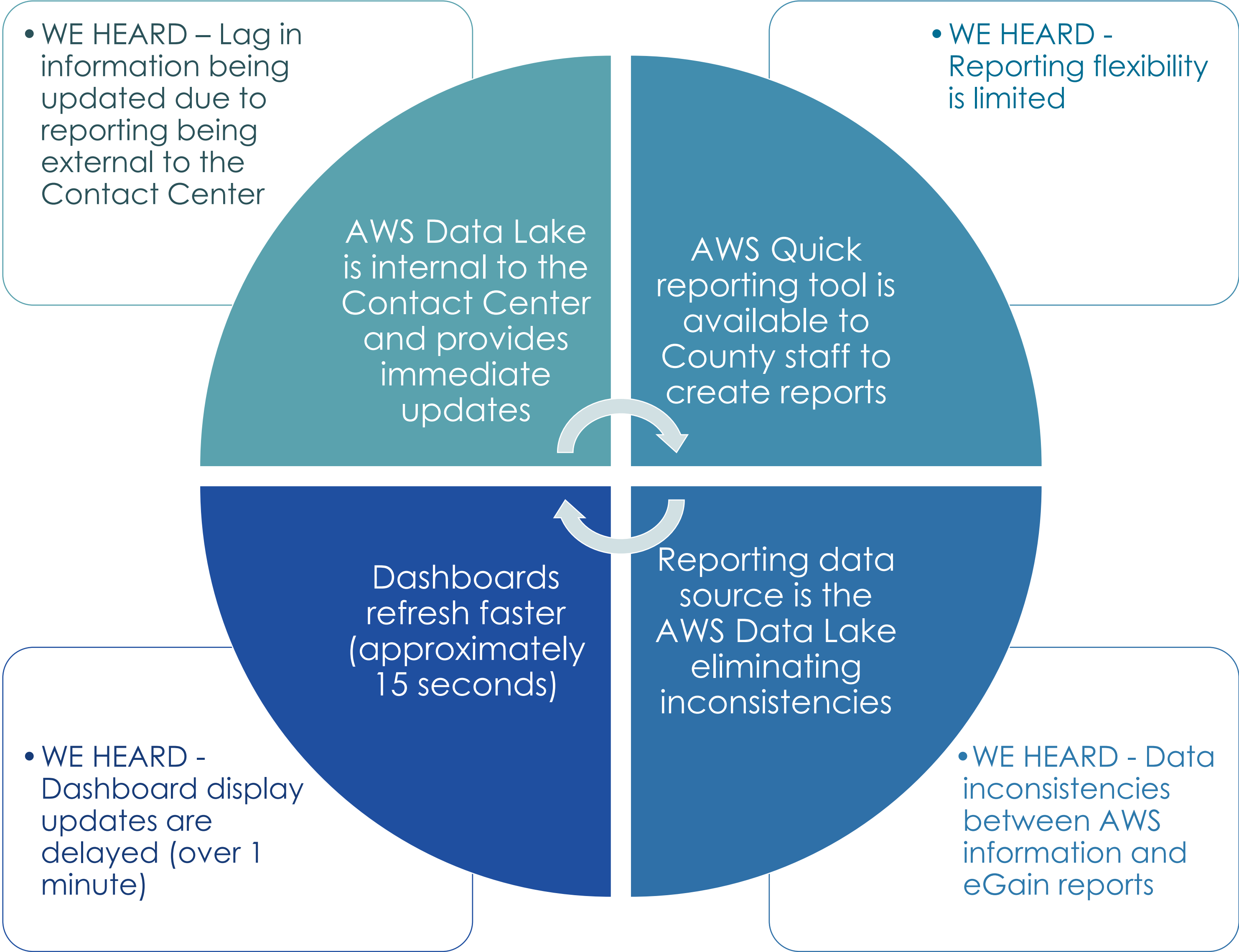
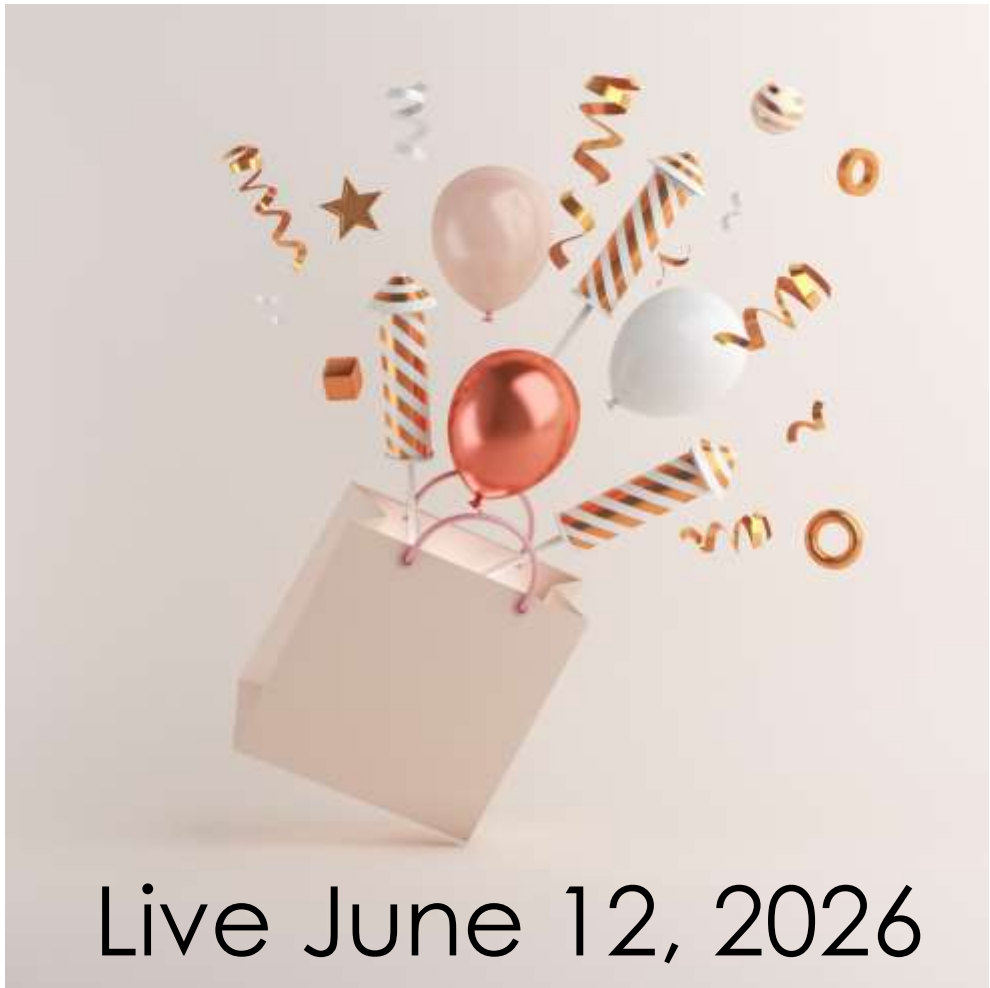
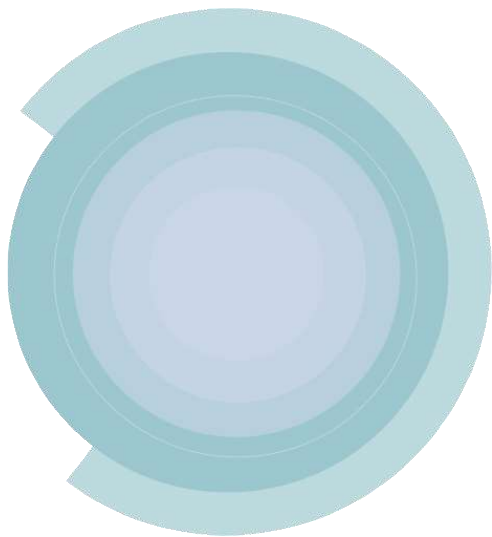
1. Determine if your County has an applicable AI policy and, if so, what information is needed to verify acceptability
2. Consider union related activities, if applicable, and what information is needed to support these communications
3. Consider your testing strategy including roles (agents, supervisors, 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



Reporting Replacement

Contact Center Roadmap

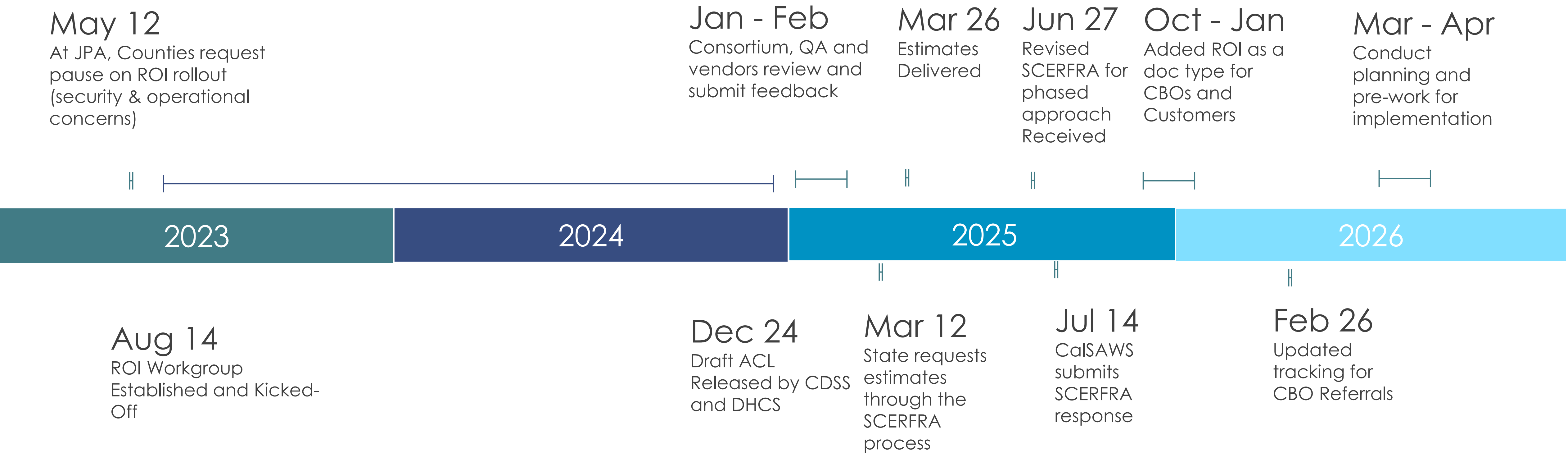
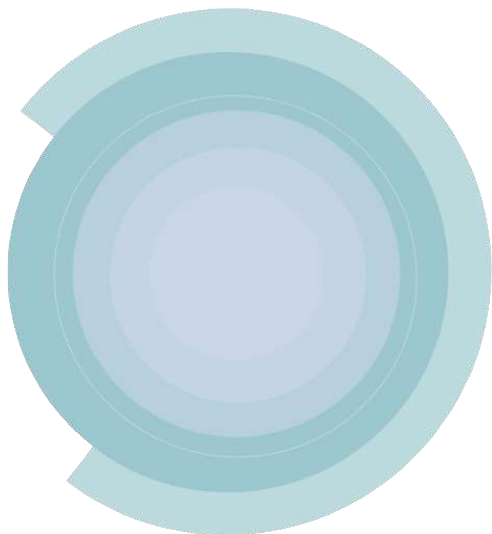
eGain Replacement



Release of Information (ROI) Update

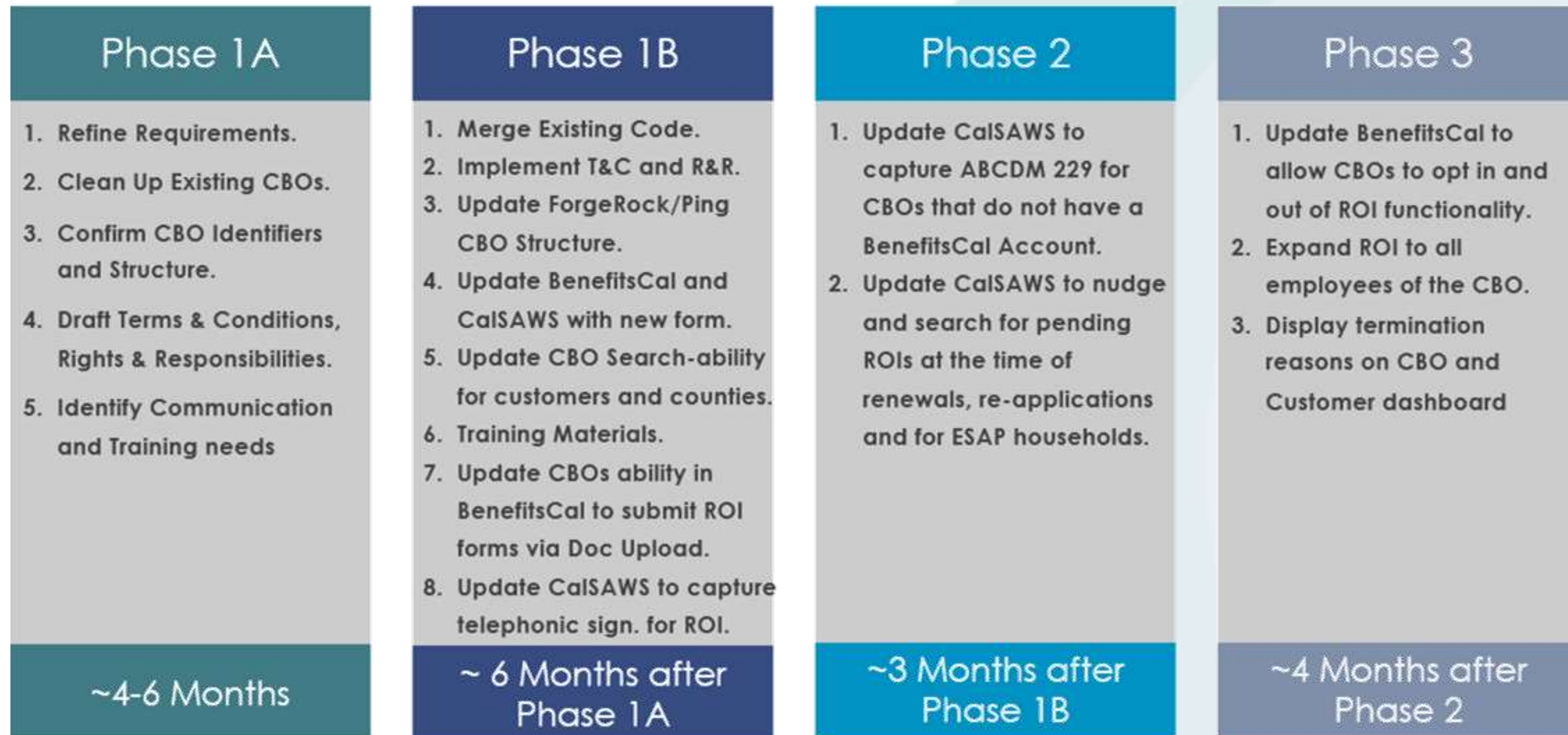
ROI – History and Context

History of Release of Information Functionality (presented May 2026)



ROI - History and Context

Original Phased Implementation Plan last presented May 2026 ([ACL 24-91](#) [ACWDL 24-21](#))



Following the 5/15/2026 JPA meeting, the project team reviewed the planned phases, current work efforts, and dependencies across all three systems – CalSAWS, BenefitsCal, and Identity and Access Management (IAM) systems

ROI – Planning Outcomes



- Identified dependencies across multiple systems to create timeline and identify key milestones and activities
- Reduced phases from four to three and the duration from 18 months to 12 months
 - No changes to requirements as previously scoped and defined
 - No changes to phase 1A scope
 - Removed Phase 3 and moved those items to either phase 1B or Phase 2
 - Where appropriate, activities in phase 1A and phase 1B will overlap
 - Both CalSAWS and BenefitsCal must be live on the new IAM System, Okta, prior to implementing Release of Information (ROI) functionality in production
- Commenced planning activities related to CBO clean up efforts and ROI workgroup activation

Revised ROI Phased Implementation Plan

Phase 1A

1. Refine Requirements.
2. Clean Up Existing CBOs.
3. Confirm CBO Identifiers and Structure.
4. Draft Terms & Conditions, Rights & Responsibilities.
5. Identify Communication and Training needs

~4-6 Months

Phase 1B

1. Merge Existing Code*.
2. Implement T&C and R&R^.
3. Update ForgeRock/Ping CBO Structure*.
4. Update BenefitsCal and CalSAWS with new form+.
5. Update CBO Search-ability for customers and counties*.
6. Update CBOs ability in BenefitsCal to submit ROI forms via Doc Upload^.
7. Update BenefitsCal to allow CBOs to opt in and out of ROI functionality*.
8. Expand ROI to all employees of the CBO+.

Target: 27.03

Phase 2

1. Update CalSAWS to capture ABCDM 229 for CBOs that do not have a BenefitsCal Account~.
2. Update CalSAWS to nudge and search for pending ROIs at the time of renewals, re-applications and for ESAP households+.
3. Display termination reasons on CBO and Customer dashboard+.
4. Update CalSAWS to capture telephonic sign. for ROI~.

Target: 27.05

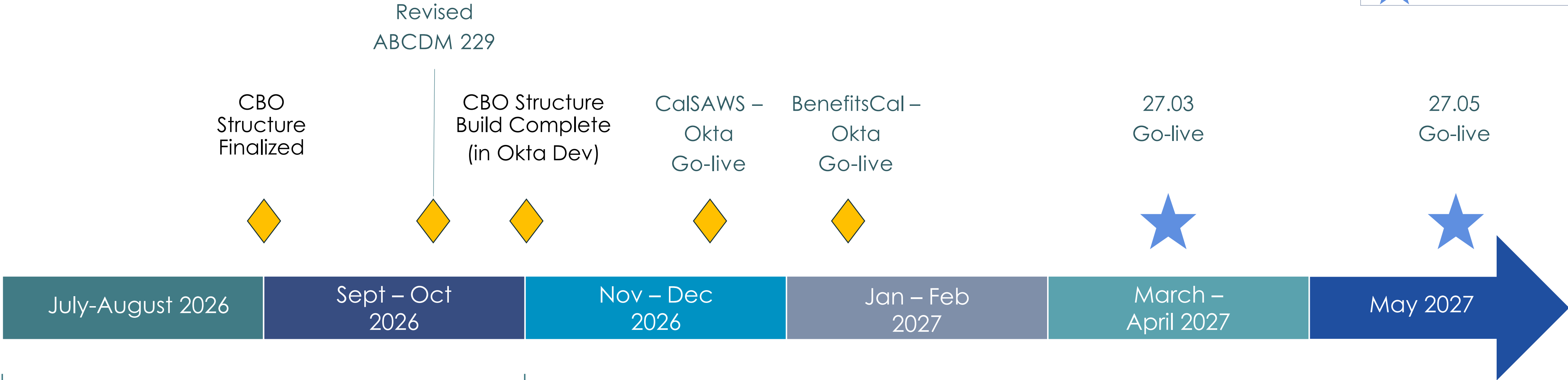
Reference:
[ACL 24-91](#) [ACWDL 24-21](#))

Legend	
*	BenefitsCal, CalSAWS and IAM integrated system changes
^	BenefitsCal system changes
+	BenefitsCal and CalSAWS integrated system changes
~	CalSAWS system changes

ROI – Draft Timeline

Phases and Key Dependencies

Legend	
	Critical dependency to meet release deadlines
	Release Go-live



Phase 1A

Phase 1B - Release 27.03: CalSAWS, BenefitsCal and Okta system changes

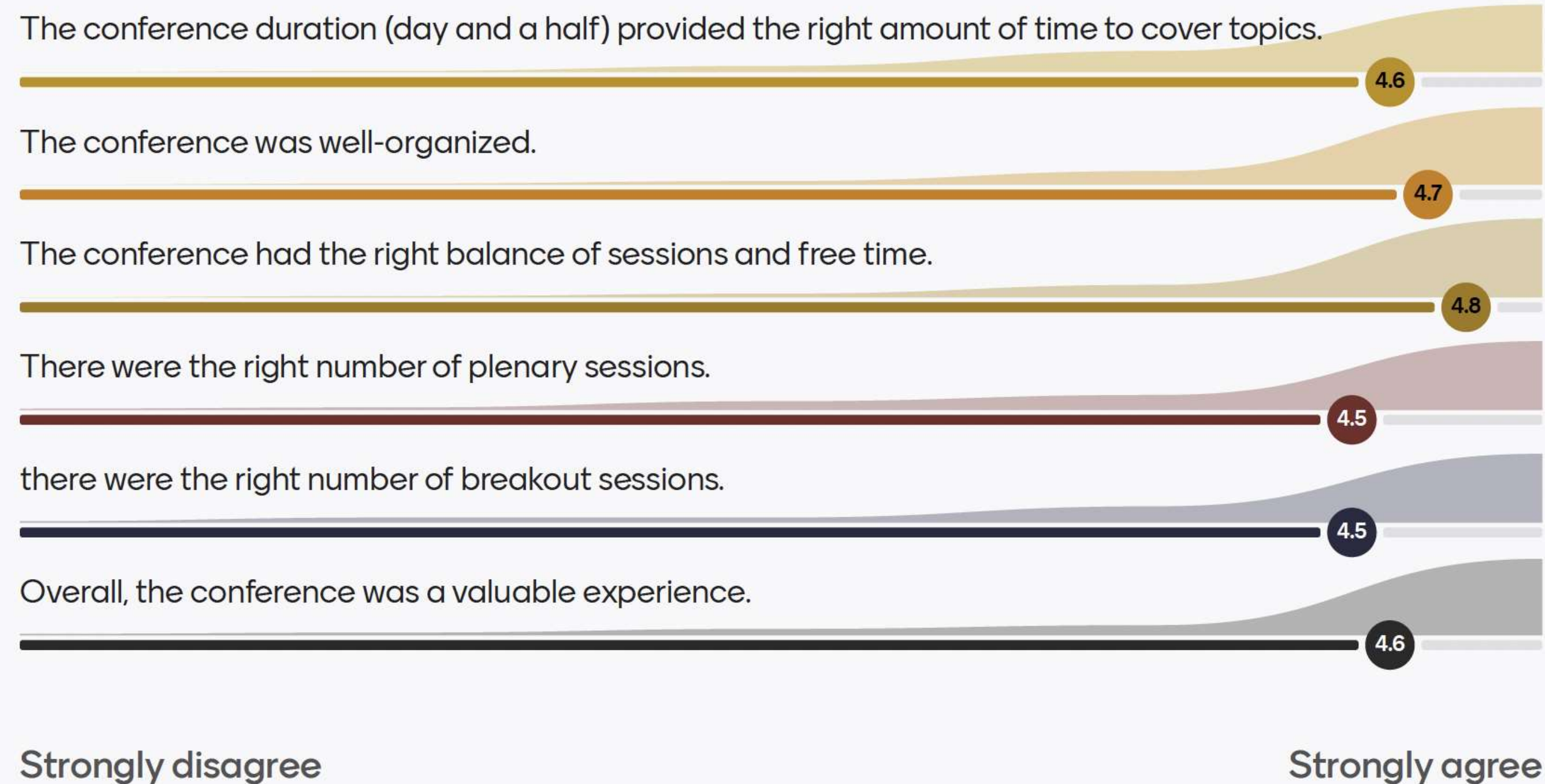
Phase 2 - Release 27.05: CalSAWS and BenefitsCal system changes

2026 CalSAWS Conference Debrief

Overall Experience



Overall Experience



Favorite Part of the Conference

The location was fantastic! Plenary speakers were excellent.

AI integration and timeline

Socializing with the other counties and sharing ideas

Hearing what other counties are doing to meet HR 1 requirements, system updates. The opportunity to network with other counties. However, I don't think CalSAWS understands task based, hotel.

Topics and Breakout session, the theme, venue

Call Summarization!

Contact center innovations have us very excited. Especially live translation.

Getting to see the people we work with in person and not just virtually.

The city and venue are beautiful and atmospheric. The hosts, the theme -- very well-organized. I liked interacting with colleagues from other counties and consortium and vendor staff.

The sessions were for the most part engaging and relevant to the conference. I appreciated the different perspectives

Learning about innovations and potential future changes that could enhance our experience.

Learning and networking.

Success stories videos

Hearing from counties

- Customer testimonials.
- Cartoon video of AI Contact center notes, excellent msg w humor.
- Error rate reduction.
- Time to connect in person.

Being in San Francisco

FCED overview and Call Center sessions

The location and the food! It was amazing.

How Can We Improve?

Early presentations on Day 1 ran out of time for Q&A

Have short networking sessions

I felt it lacked some engagement from the CalSAWS team.

More conversation about timelines for enhancements and system stability.

Some sessions felt rushed and needed a touch more time. There was time at the end, maybe a Menti to submit questions when sessions go over and then a Q&A conversation at the end.

Nothing!

More sessions that relate to child welfare & a more affordable & accessible location

Offer a bit more time to see the host city and organize an evening networking event

Instructions on logistics.. where's the restroom. Directions on break time... where to line up... maybe name plates for the panel... get to know who you are sitting next to and lastly, more documentation

The testimonies at the end lacked any diversity of customer success stories. This is California. I would've loved to see more people from different backgrounds.

Some of the presentations are already known items.

If breakfast could have included some protein Eggs and bacon

More inspirational keynote

Better breakfast

The conference location was not the best with a lack of walkable areas to eat/grab coffee. The cost/feel of the hotel/food/everything related to it was high.

Planning Ahead

Survey to the JPA Member Representatives

01

Separate Member Representative Voting from Conference?

02

Standard Conference or Strategic Planning Meeting?

03

In which month should the Conference and/or Strategic Planning Meeting be held?



Upcoming JPA Board of Directors and Member Representative Meetings

August 2026 JPA Meeting

August 14, 2026 | Zoom and Library Galleria, Sacramento

September 2026 JPA Meeting

September 11, 2026 | Zoom and Library Galleria, Sacramento

October 2026 JPA Meeting

October 9, 2026 | Zoom and CalSAWS Office Gold River

November 2026 JPA Meeting

November 20, 2026 | Zoom and Library Galleria, Sacramento

December 2026 JPA Meeting (Tentative)

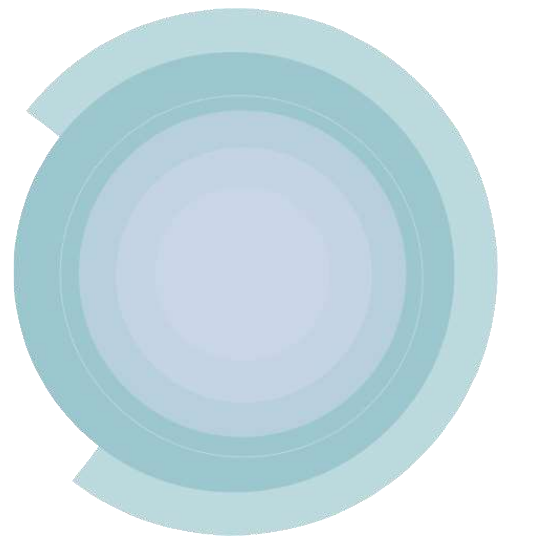
December 18, 2026 | Zoom and CalSAWS Office Gold River

January 2027 JPA Member Representatives Meeting

January 28, 2027 | Zoom and CalSAWS Office Gold River

Closed Session

Closed Session



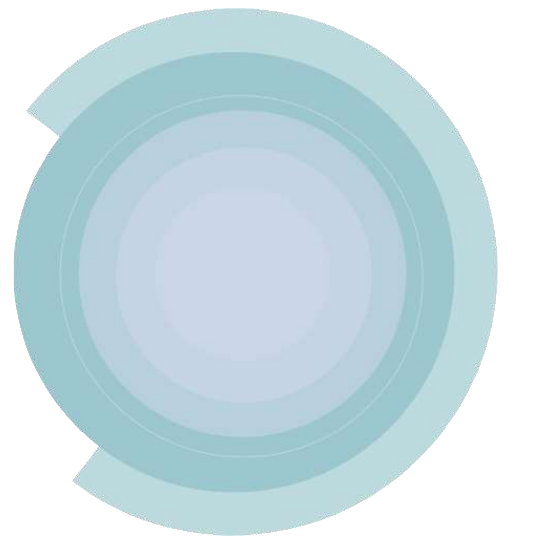
15. Public Employment (Executive Director) (Gov. Code §§ 54954.5(e), 54957(b)(1)).

The JPA Board of Directors is in Closed Session and will return soon.

Reconvene Open Session

CalSAWS | JPA Board of Directors

Reconvene Open Session



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

Adjourn Meeting