

Project Steering Committee Meeting

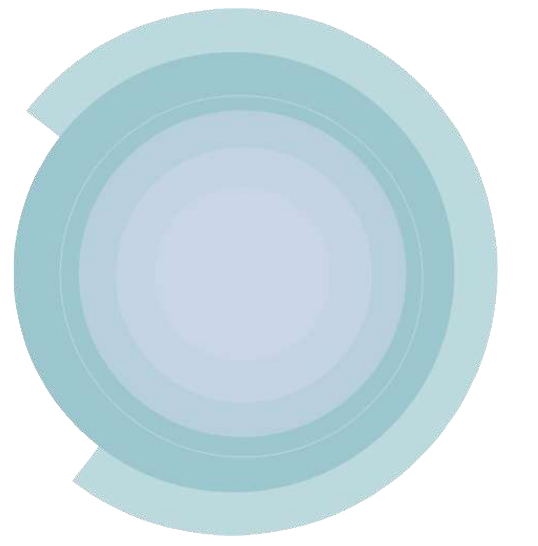
September 17, 2026



CalSAWS



Agenda

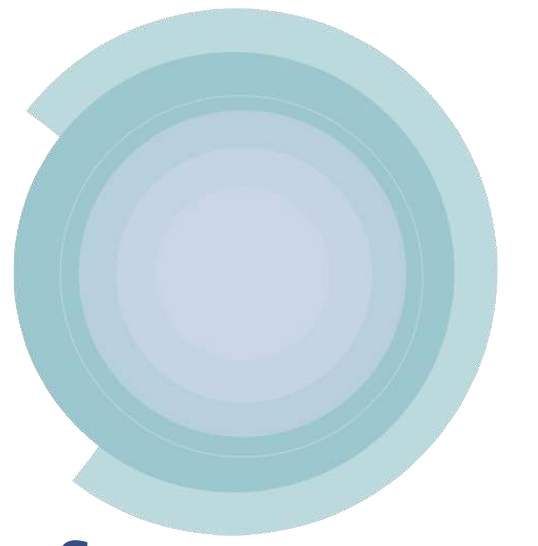


1. Call Meeting to Order.
2. Confirmation of Quorum and Agenda Review.
3. Public Comment: Public opportunity to speak on any item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

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



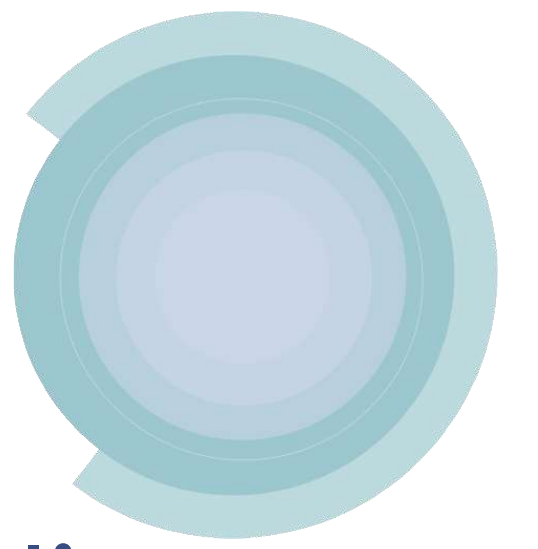
4. Approval of the Minutes and review of the Action Items from the August 20, 2026 PSC Meeting.

Informational Items

Introduction to the CalSAWS JPA Board Policy Manual

JPA Board Policy Manual

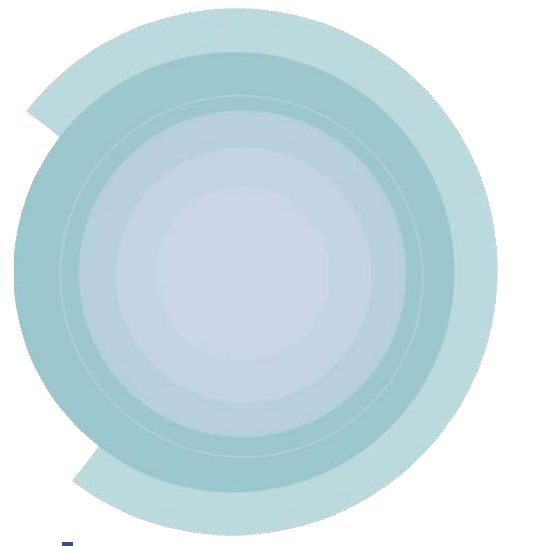
Need for a new Board Policy Manual



- CalSAWS has evolved from a “start-up” to a mature public agency.
- The governance model needs to reflect this evolution.
- Current “handbook” does not address the present reality and does not provide executive level policies or practices, including how the various bodies within the CalSAWS environment (e.g., Board, PSC, CCB, etc.) relate to, or communicate with, one another.

JPA Board Policy Manual

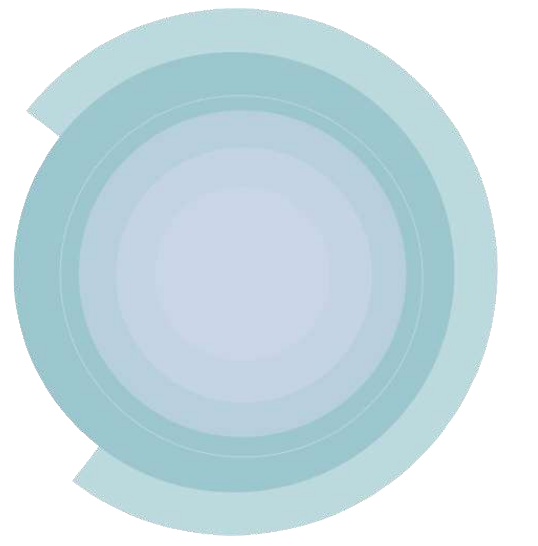
Highlights of Proposed Board Policy Manual



- Establishes guidelines for how Directors approach their role on the Board.
- Better defines the unique, yet connected, roles of the various committees and workgroups within the CalSAWS environment:
 - How these bodies relate to one another.
 - How they communicate with one another.
- Creates a new Technical Advisory Workgroup.

JPA Board Policy Manual

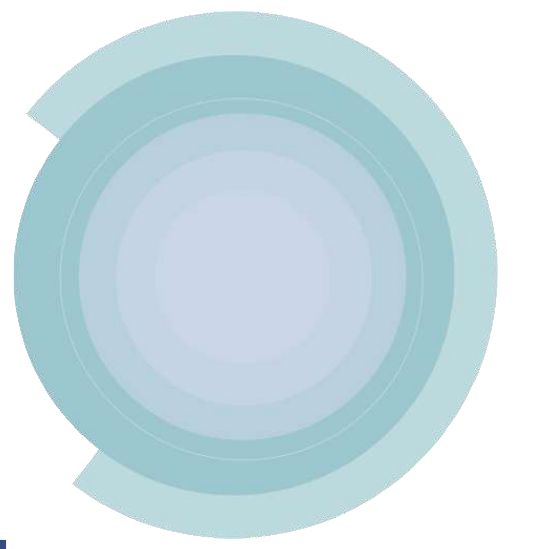
Current Table of Contents



- I. PURPOSE**
- II. THE CALSAWS JOINT POWERS AUTHORITY (JPA)**
- III. CALSAWS GUIDING PRINCIPLES**
- IV. THE JPA BOARD**
- V. MEMBER REPRESENTATIVES; MEETINGS**
- VI. CALSAWS EXECUTIVE DIRECTOR**
- VII. CALSAWS COMMITTEES AND WORK GROUPS**
- VIII. SCR ESCALATION PROCESS**

JPA Board Policy Manual

Review Process



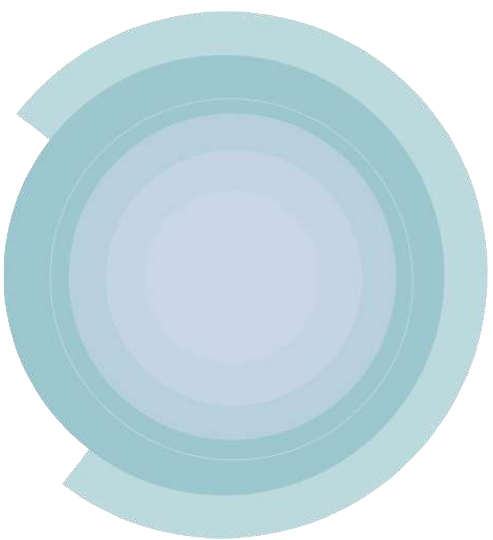
- September Board Meeting: Introduction of proposed Manual and discussion.
- Between September and October Board meetings Directors will submit comments to Legal Counsel, who will collect those comments in a Comments Log, which will be included in October Board packet.
- October Board Meeting: Discussion of comments in Comment Log and receipt of any additional comments.
- November Board Meeting: Presentation of revised Manual based on comments in Comment Log as well as comments received during two prior Board meetings. Further discussion.
- December Board meeting: Presentation of proposed final Manual and vote by Board re adoption.

CER to SCR Status and Plans

CalSAWS | Project Steering Committee

CER to SCR Status

Process Challenges & Mitigations



Volume > Capacity



Improve Efficiencies
through Tools &
Tracking

Transparency



Improve Reports for
Clarity

**Lacks Executive
Level Input**

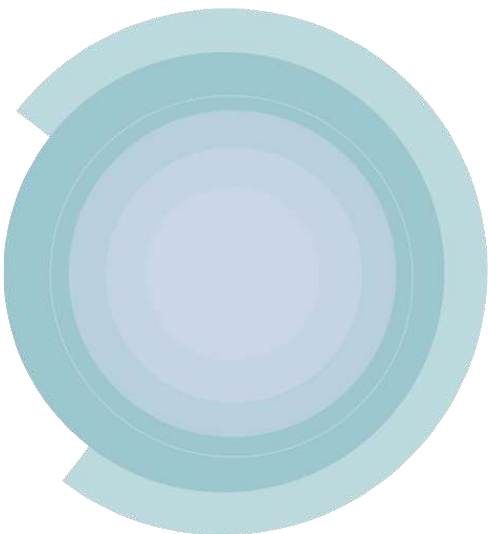


Enhance Process &
Prioritization
Guidelines

Additional Suggestions / Regular Reviews and Process Tuning

CER to SCR Status

Volume > Capacity

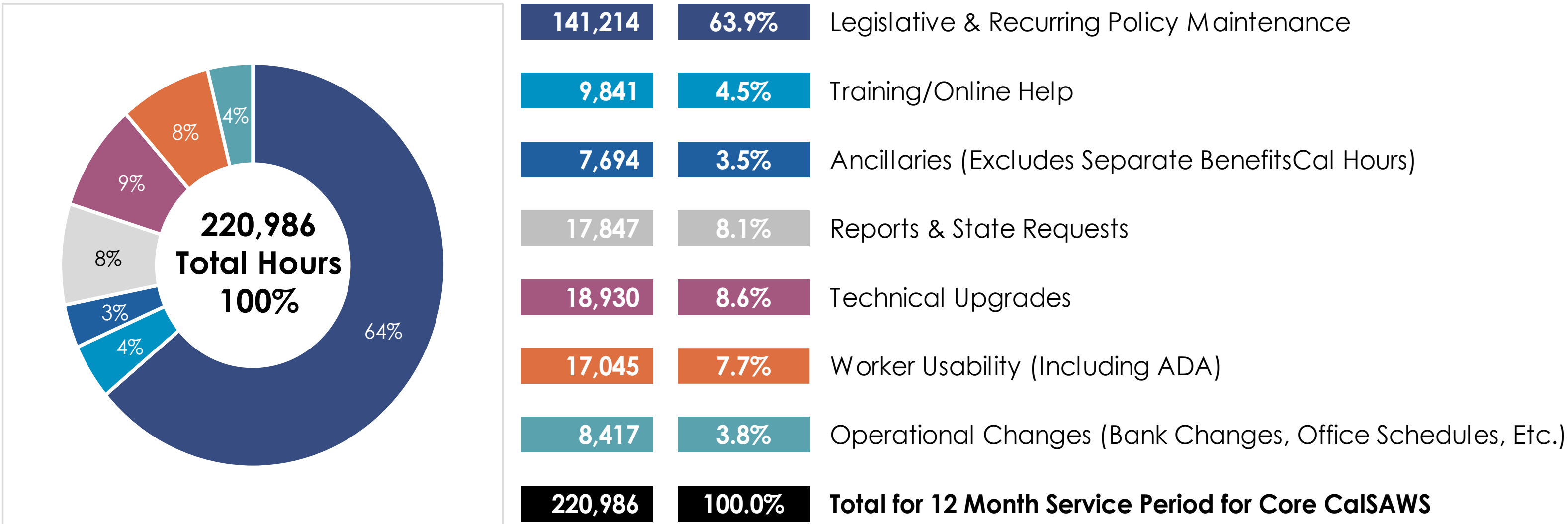


Nearly 2/3 of base application maintenance hours were dedicated to policy changes last year
Current year is trending the same if not higher



Mitigations

CalSAWS | SFY 2025/26 APPLICATION MAINTENANCE ACTUAL HOURS BY CATEGORY

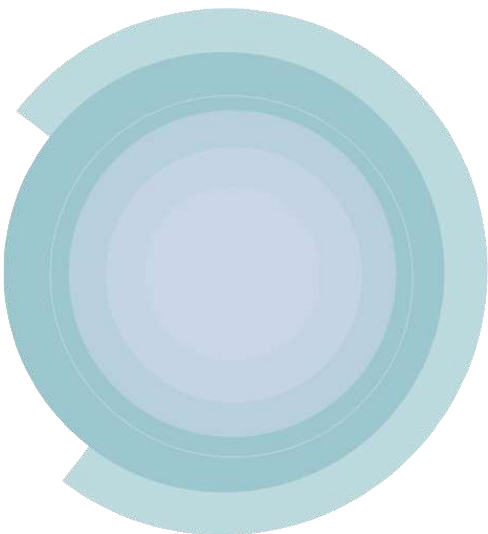


Note: Excludes Premise, Change Orders, and CPOs

- ❑ Explore New AI-DLC Tools and Leverage Application & Architecture Evolution Efforts to Improve Efficiencies
- ❑ Monitor Contractor Productivity for Improvements

CER to SCR Status

Transparency



Presentations typically focus only high-priority items
Detailed reports are not easily accessible or easy to understand



Mitigations

Premise + M&E

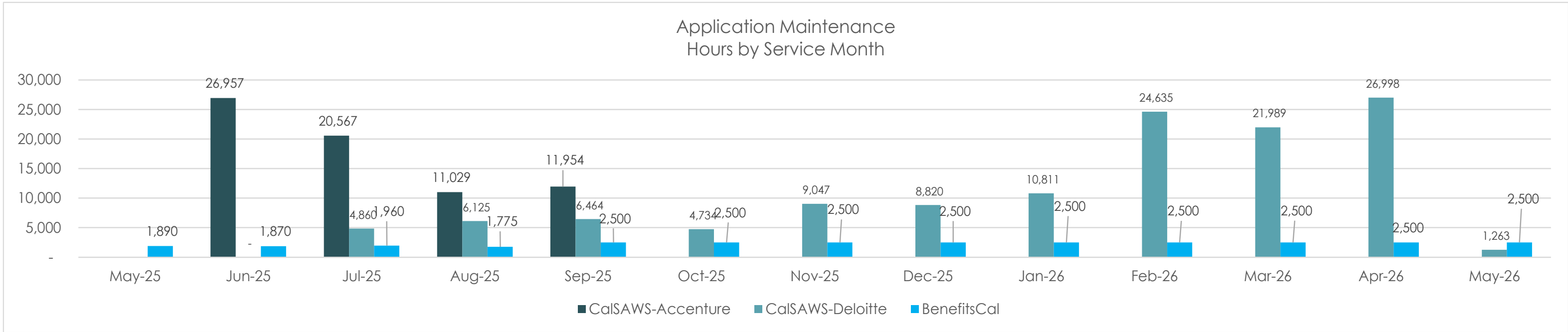
85 SCRs

~79k hrs.

75 Functional SCRs

10 Training SCRs

Key	Summary	Team Responsible	Committee/Workgroup	Outreach Required	Outreach Description	Training Impacted
GAGR-1038	Gainwell QA regression test of the GAGR Automated Solution for Release 26.09	Client Correspondence	GA/GR	No		N/A
GAGR-954	San Francisco Automate Denials for no-show appointment	Client Correspondence	GA/GR	No		N/A
CA-304993	26.09 Database Schema Comparison Support SCR	Eligibility	Usability	No		
CA-303986	Online Help: Create OLH pages for The Work Number CA-296429	Training	Other	No		Online Help
CA-302791	Online Help: Update the Workload Reassignment Detail OLH page per CA-301206	Training	Other	No		Online Help
CA-302323	Online Help: Create JA Work Number (TWN) Verification CA-296429	Training	Other	Yes	Update Job Aid	Job Aid
CA-302243	Online Help: Create OLH Pages for Report Inmate Release Dates from CDR to Counties CA-294412	Training	Other	No		Online Help
CA-302106	Deliver PBDS Changes associated with Reports/Analytics 26.09	Reports	Other	No		N/A
CA-301662	CalSAWS Release	Batch/Interfaces	Self Service Portal	No		N/A
CA-301573	Turn on ROI functionality in the SIT Environment Only	Training	Other	No		Online Help
CA-301390	Online Help: Update and Create OLH pages for Workload Mgmt Phase 2 CA-293075	Training	Training	Yes	Update Job Aid	Job Aid
CA-301350	Online Help: Update the Self Service Portal (SSP) - e-Applications Job Aid due to CA-297470 and CA-292880	Training	Other	No		Reports Overview
CA-301349	Online Help: Update the Forms Overview for the 26.09 Baseline	Training	Other	No		Forms Overview
CA-300873	Convert MISC RDS database to Global cluster in production only	Infra DBA	Tech	No		N/A
CA-300791	SFTP server and connectivity setup between CARES and CALSAWS	Infra Cloud Ops	Tech	No		N/A
CA-300788	Update Agent Available Flow Routing for Queue Transfer Calls	Infra Contact Center	IVR & Contact Center	No		N/A
CA-300438	Emulator Changes for 26.9 MCH R. 1 Changes	Medi-Cal/CalHEERS	Medi-Cal/CMSP	No		N/A
CA-300289	Return Mail file transfer changes and updates - Phase 2 and Re-enable Implementation	Batch/Interfaces	Other	No		N/A
CA-300239	Restricting Federal Funding for Certain QNCs Phase II	Medi-Cal/CalHEERS	Medi-Cal/CMSP	No		Job Aid
CA-299267	Enable PVS automation functionality for pilot counties	Batch/Interfaces	IEVS	No		N/A
CA-299206	Additional journal entries for ABAWD related actions	Eligibility	CalWORKs/CalFresh	No		N/A
CA-299704	Virtual Assistant Expansion - Release 26.09 (Release 37)	Virtual Assistant	Other	No		N/A
CA-299510	Add ABAWD Summary Page	Online	CalWORKs/CalFresh, Usability	No		N/A
CA-299476	6-Month Redeterminations for MAGI Medi-Cal New Adult Group - SSP Impacts	Batch/Interfaces	Medi-Cal/CMSP, Self Service Portal	No		Job Aid
CA-299476	ABAWD Enhancement HR1 Workgroup - Update ABAWD and Work					

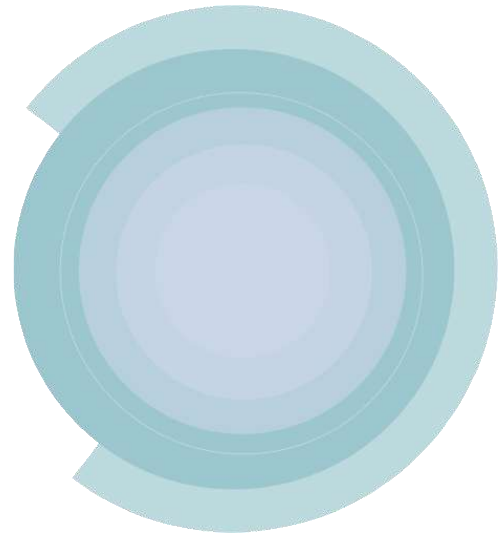


Enhance reports to provide more insight on overall effort and progress

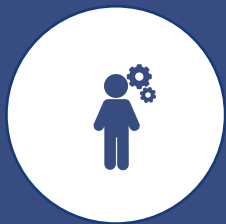
Include Major Upcoming Changes list to JPA and PSC Meeting Material

CER to SCR Status

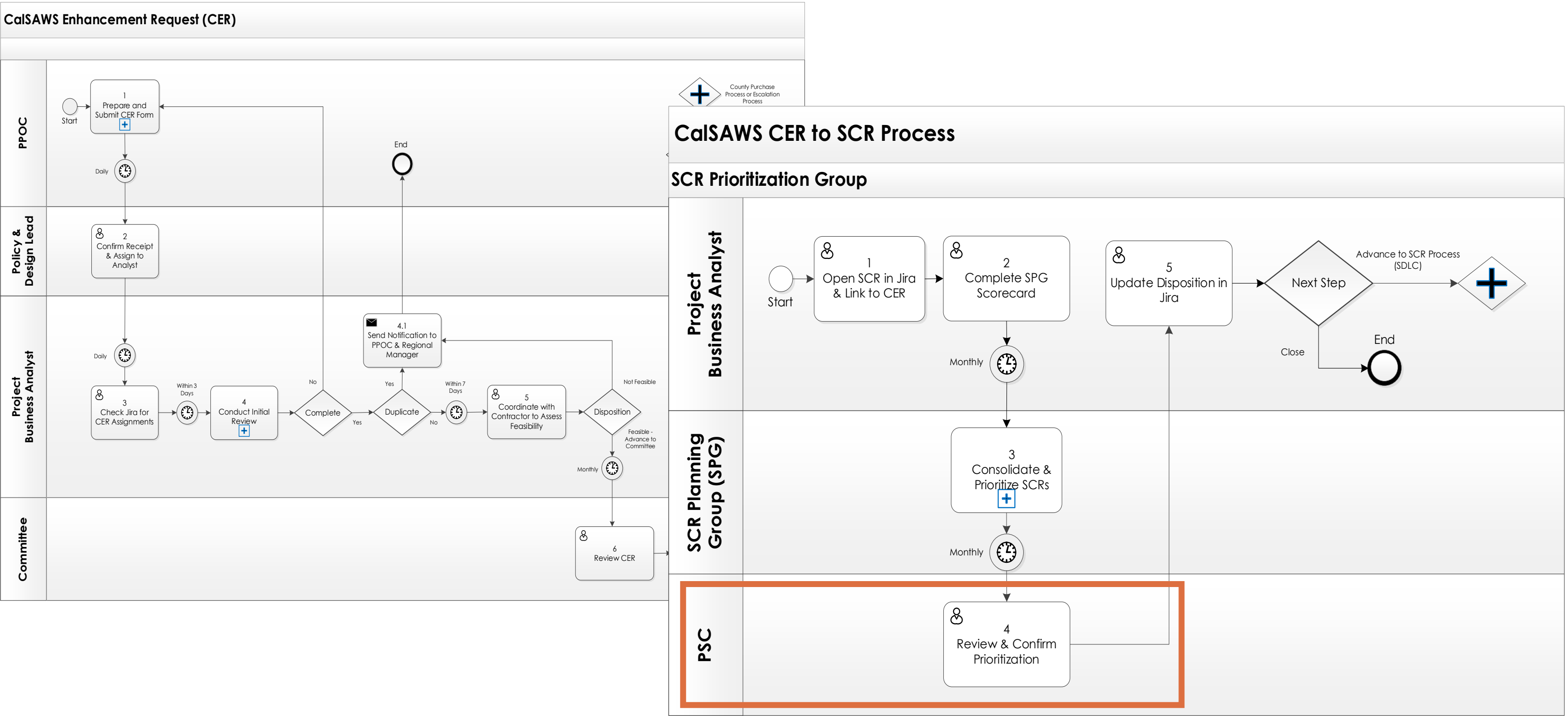
Executive Input



County input on priorities is currently addressed at the committee level with no formally structured input from PSC or JPA



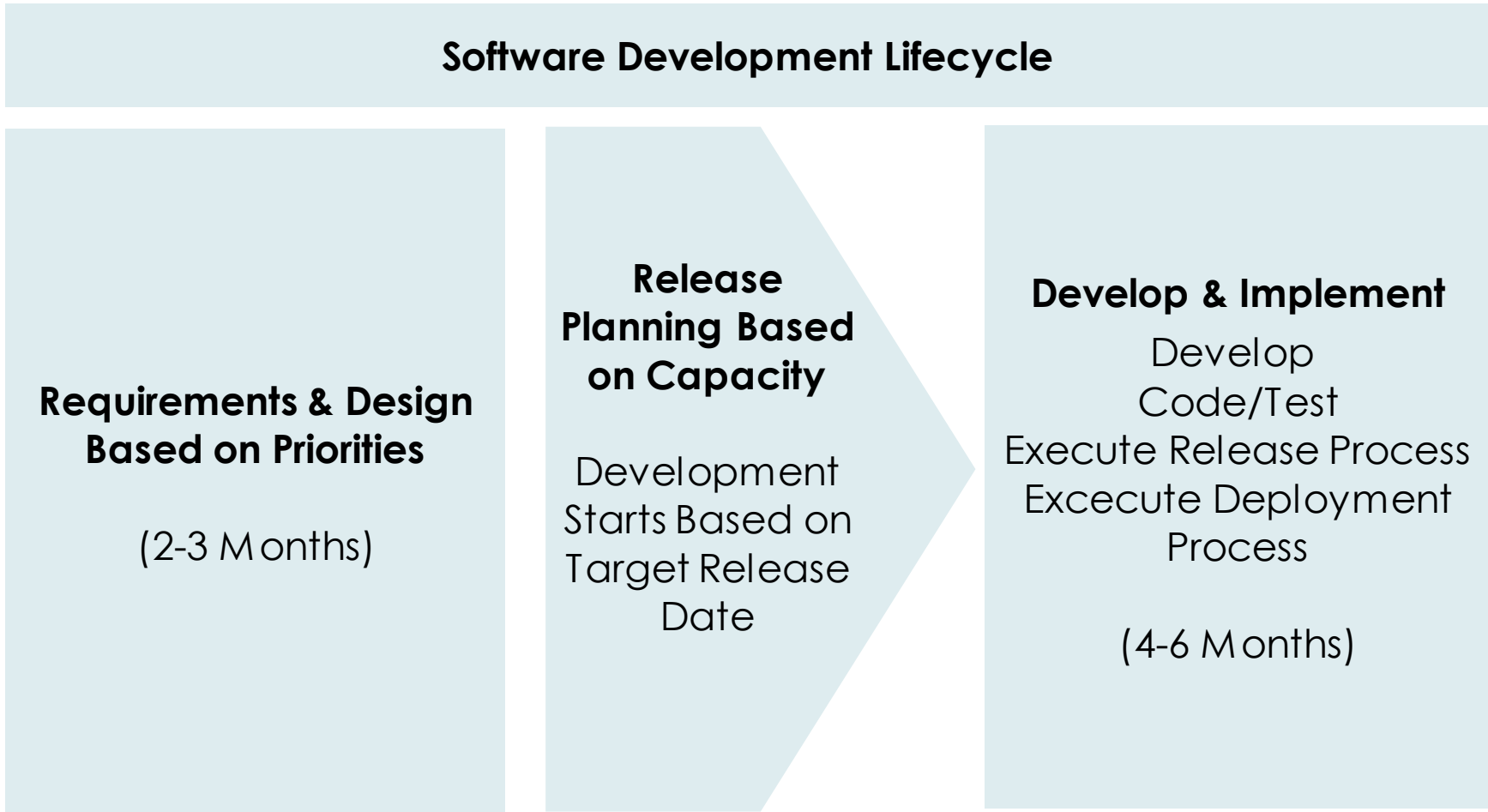
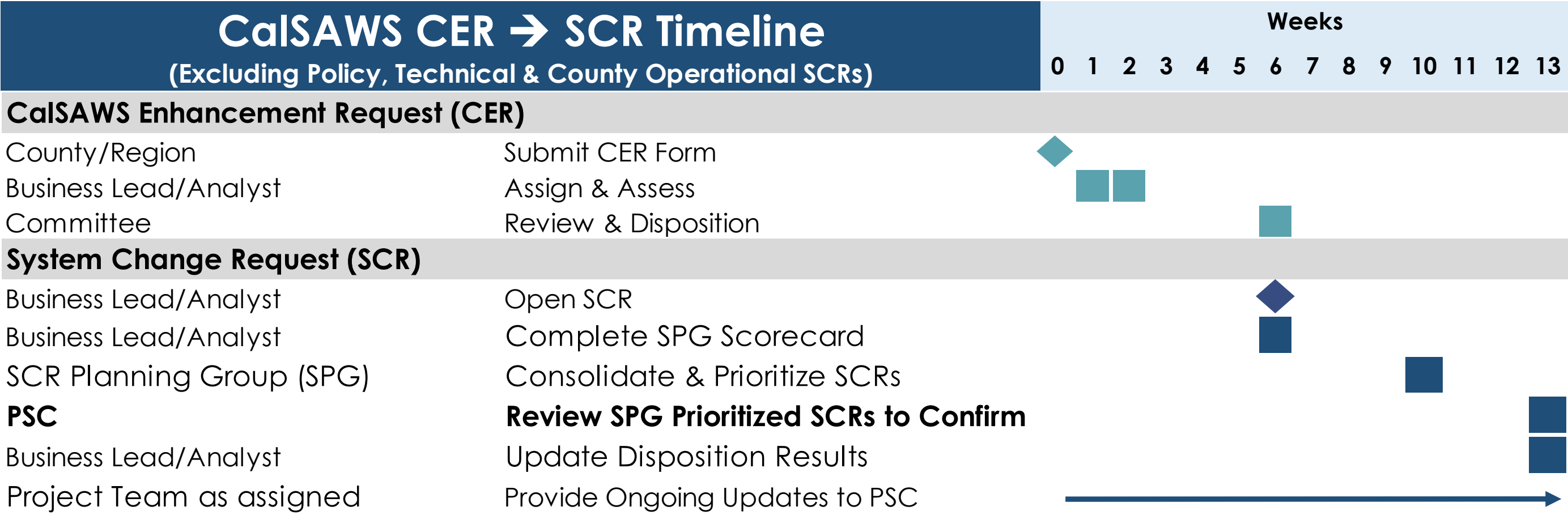
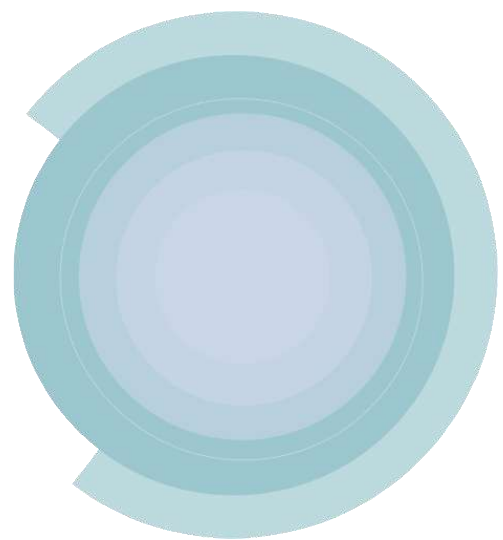
Mitigations



- ☑ Update CER form to ensure all details are considered
- ☑ Add PSC confirmation to SCR prioritization
- ☐ Revisit Guiding Principles (See Policy Manual)
- ☐ Review SCR Scorecard with PSC to ensure alignment
- ☐ Leverage bi-annual Strategic Planning Meeting to confirm or update priorities

CER to SCR Status

Timeline

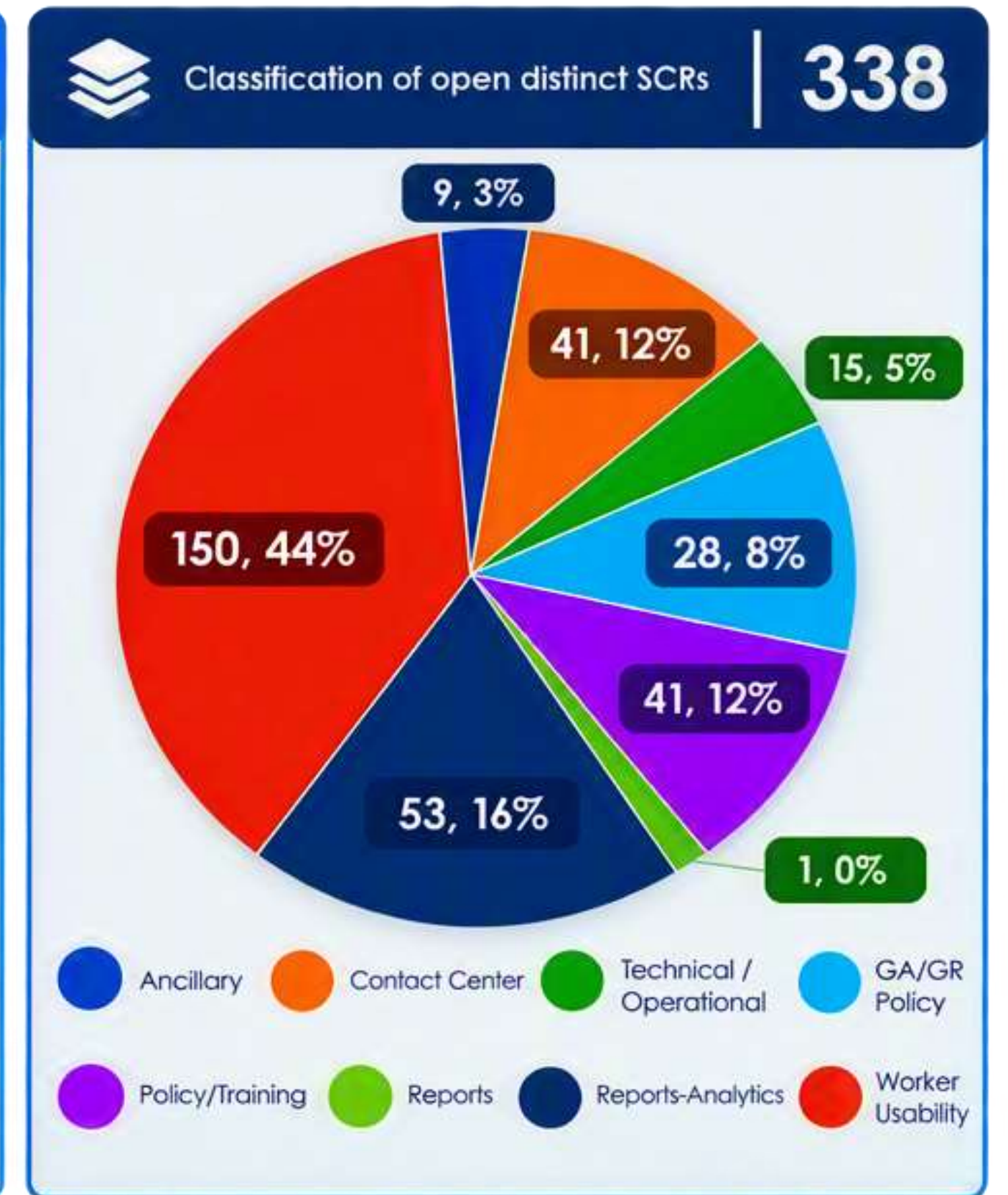
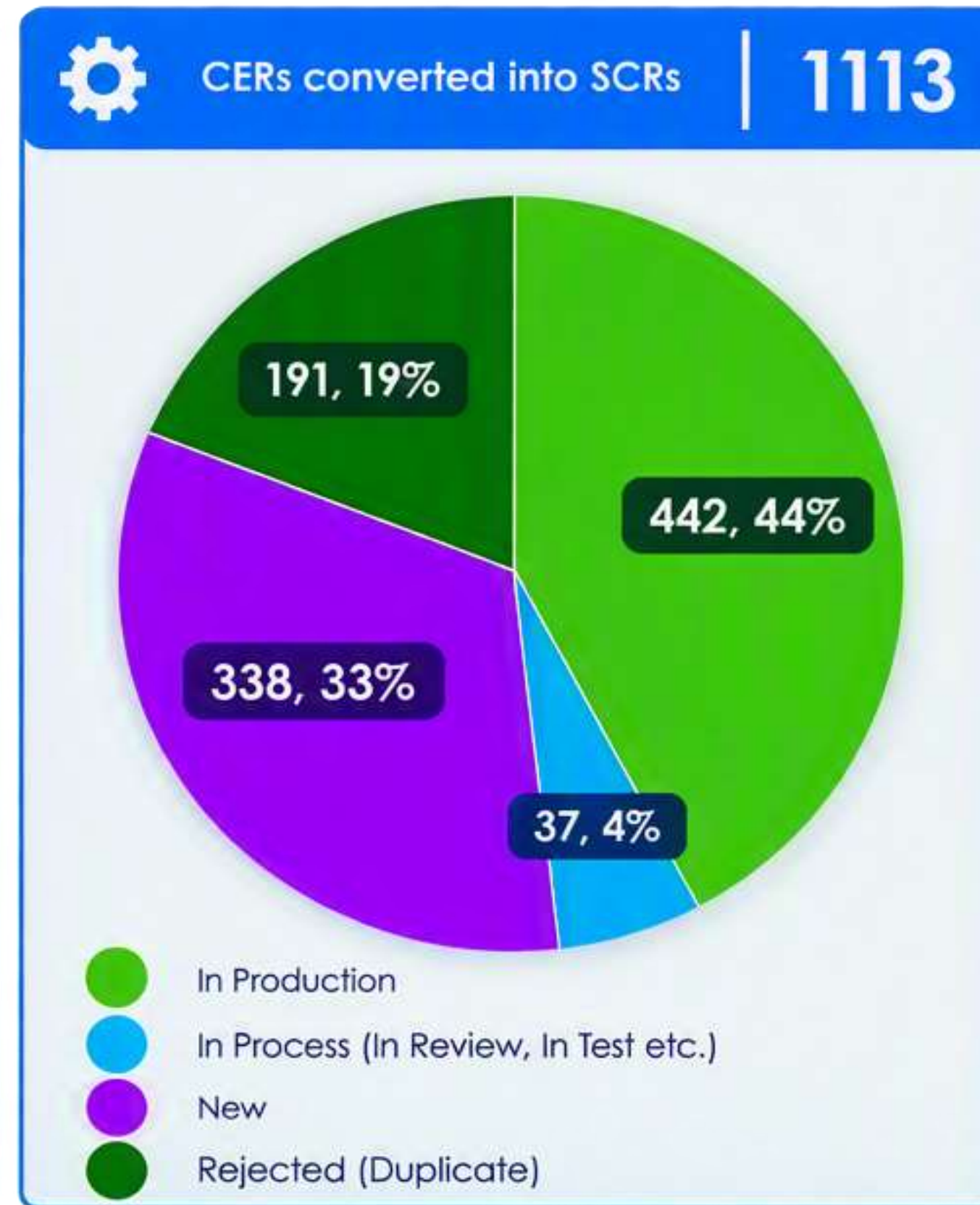
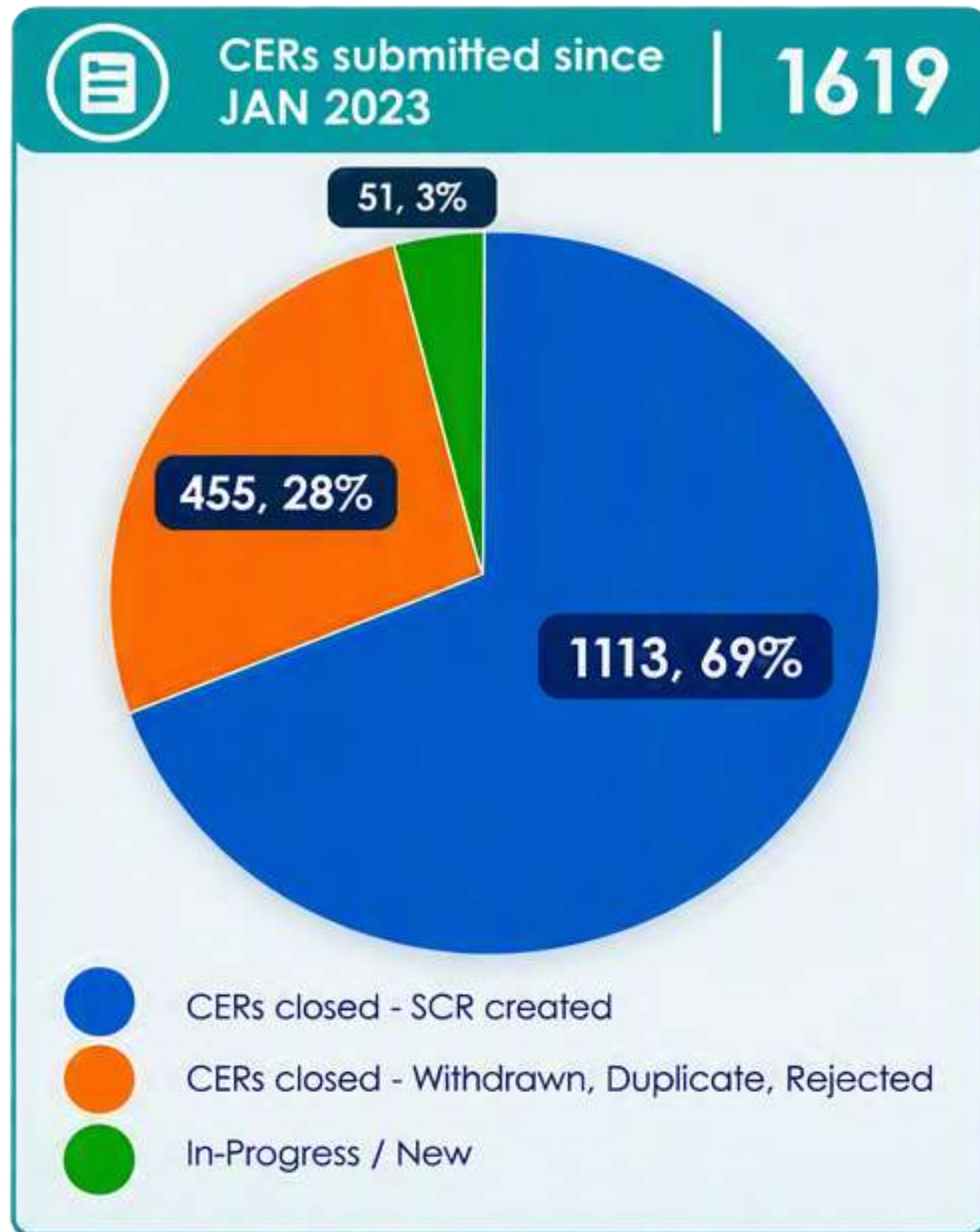


NOTE: Timelines will vary due to meeting schedules and SCR level of complexity.



As efficiencies are realized through AI-DLC and other improvements, governance will need to evolve

CER/SCR Statistics



★ Highlights



1,113 (69%)

of all CERs submitted since January 2023 have been dispositioned with SCR created.



442 (44%)

SCRs associated with CERs are in Production.



338

SCRs are in new status pending next steps i.e. in the backlog.



The **338** new SCRs associated with CERs will follow different prioritization processes based on their categories. For example, **Policy SCRs move directly into the SDLC process, while GA/GR Policy SCRs follow the CPO process.**



Of the **338** SCRs, **160** are classified as Enhancement change-type SCRs.



338

Total New SCRs
(associated with CERs)



160

Enhancement SCRs

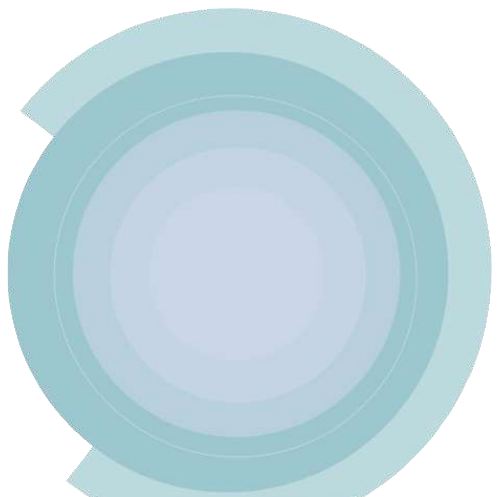


Categorization of 160/338 Enhancement SCRs



CER / SCR Process Update

Next Steps



OCT 2026

**Project**

Present County Pain Points identified through County site visits.

**PSC**

Review and confirm identified County Pain Points.

NOV 2026

**Project**

Assess submitted CER/SCR enhancements for alignment with confirmed County Pain Point areas.

**Project**

Utilize the SPG Scorecard to develop a recommended prioritization of aligned CER/SCR enhancements.

**Project**

Present the recommended prioritization to PSC for consideration.

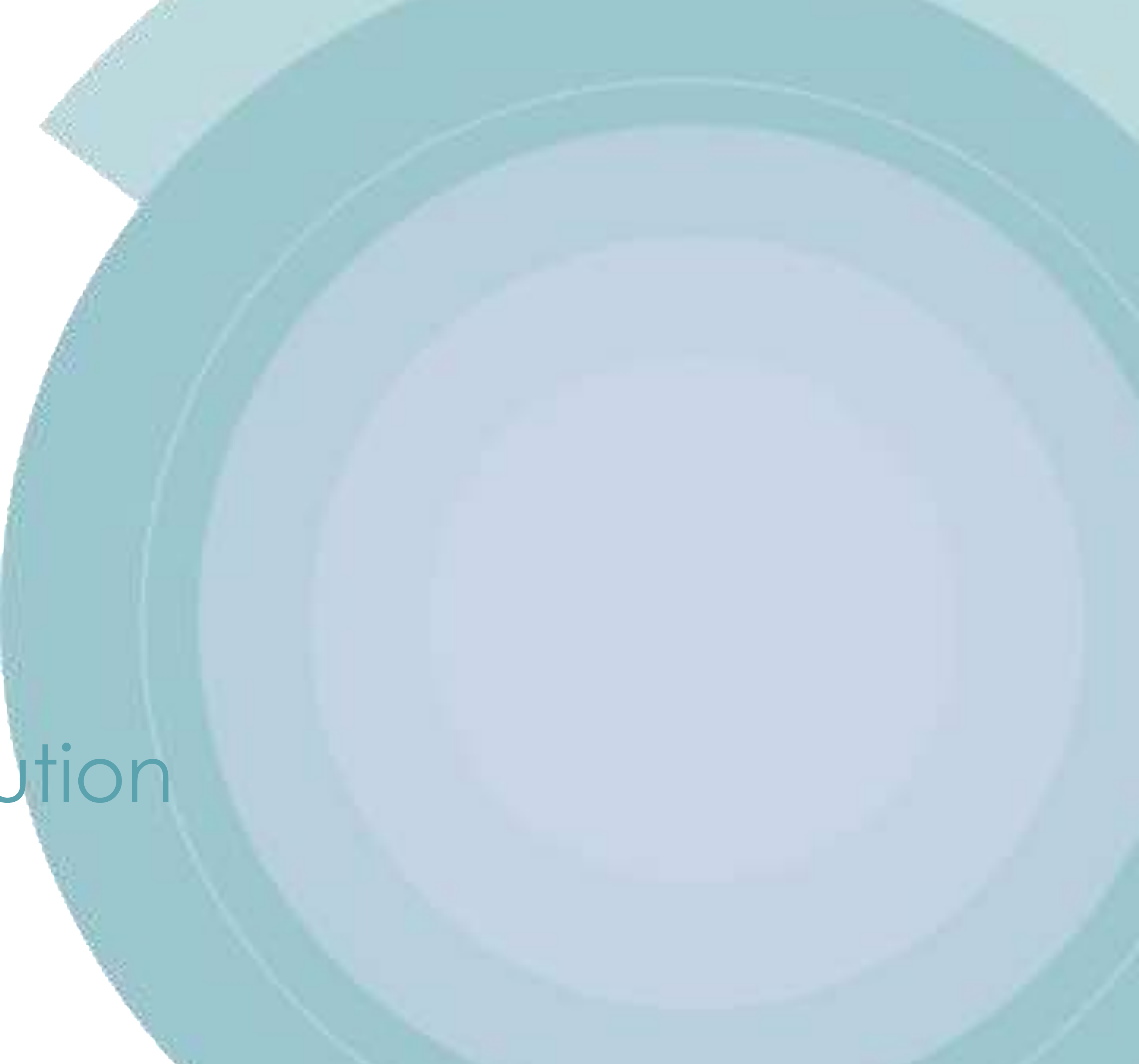
**PSC**

Review and confirm the prioritized CER/SCR list.

ONGOING

**Project**

Provide monthly progress updates on CER/SCR target release(s) and implementation plans.



Introduction to Application and Architecture Evolution

New Scope and Hours

Application/Architecture Evolution

Section 5.1.2.4 – M&E Agreement

Section 5.2.15 – M&E Agreement

Contractor must maintain the current CalSAWS System **while evolving its architecture toward a technically viable steady state:**

- **Migrate the CalSAWS System from its current monolithic architecture to a modular to enable faster development and deployment** and lower cost of ownership
- **Move to a DevOps model** with automated deployments that **improve security, reduce human error**, and enforce infrastructure compliance
- **Evolve batch processing design** for greater efficiency, leveraging **event-streaming best practices**
- **Achieve cost-effective operations** on behalf of the Consortium
- **Develop an approach to validate expected outcomes and improvements** — covering **usability, error reduction, cost savings, and data analytics/reporting**

Goals



Improve the life
of the system



Faster time
to market



Improve performance and
support scalability



Reduce Total Cost
of Ownership

Continuing the CalSAWS Modularization Journey

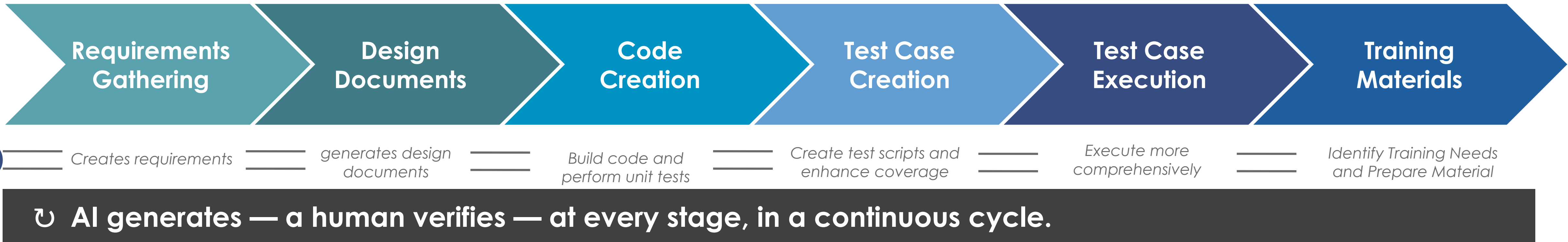
This is back-end, infrastructure-level work that continues the modularization journey under **Application & Architecture Evolution** scope under the M&E Contract

1 Modularization	2 Cost Efficiency (AI-Assisted Development)	3 Rules Engine Migration
Breaking the CalSAWS monolith into independent, cloud-native services — sequenced around county pain points <i>incl. Observability & DevOps foundations</i> Delivers: • <i>Improved application life</i> • <i>Reduced Cost of Ownership</i> • <i>Ease of maintenance</i>	Applying AI to design, build, and test the changes to: • Deliver changes faster • Higher quality and consistency <i>Proof of Concept in Progress</i> Delivers: <i>Faster Time to Market</i> <i>Enhanced Quality</i> <i>Improved Consistency</i>	Moving eligibility rules onto a modern Java engine to: • Meet Performance SLAs • Improve scalability and resilience of eligibility determinations <i>Migrate 3700 EDBC rules to Java</i> Delivers: <i>Enhanced Performance</i> <i>Improves Scalability</i>

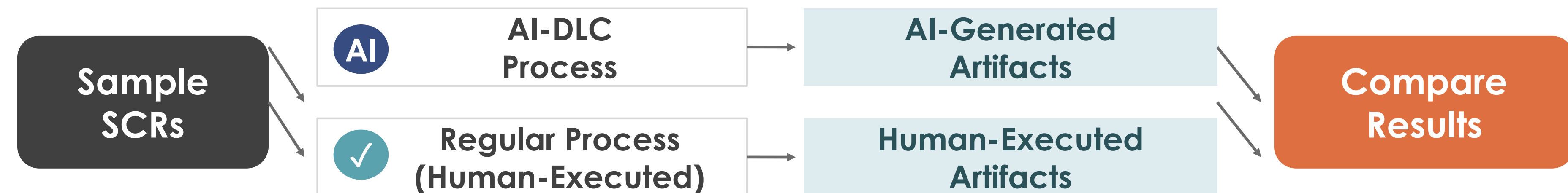
This work sets up the technical foundation for improving county user experience.

What Is AI-DLC?

Artificial Intelligence applied to the software development lifecycle to achieve - better quality, more consistency, and faster delivery.



WHERE WE ARE: A LIVE PROOF OF CONCEPT



What's next:

- Review results
- Implement AI-DLC to full SDLC

Requirements, designs, code, and test results — built both ways, compared directly.

Bringing It Together: Benefits and What's Next

- 1 Modularization**
Faster, more resilient services — sequenced to county priorities
- 2 AI-DLC**
More delivery capacity, with quality and consistency, at a funded and governed cost
- 3 Rules Engine**
Improves performance SLA concern and reduces licensing costs

NEXT STEPS

Keep Talking to Counties

Work with the Technical Advisory Workgroup to validate the sequence and provide regular reports to the PSC/JPA as work proceeds.

Refine as We Learn

Adjust priority and sequencing based on what that ongoing engagement surfaces.

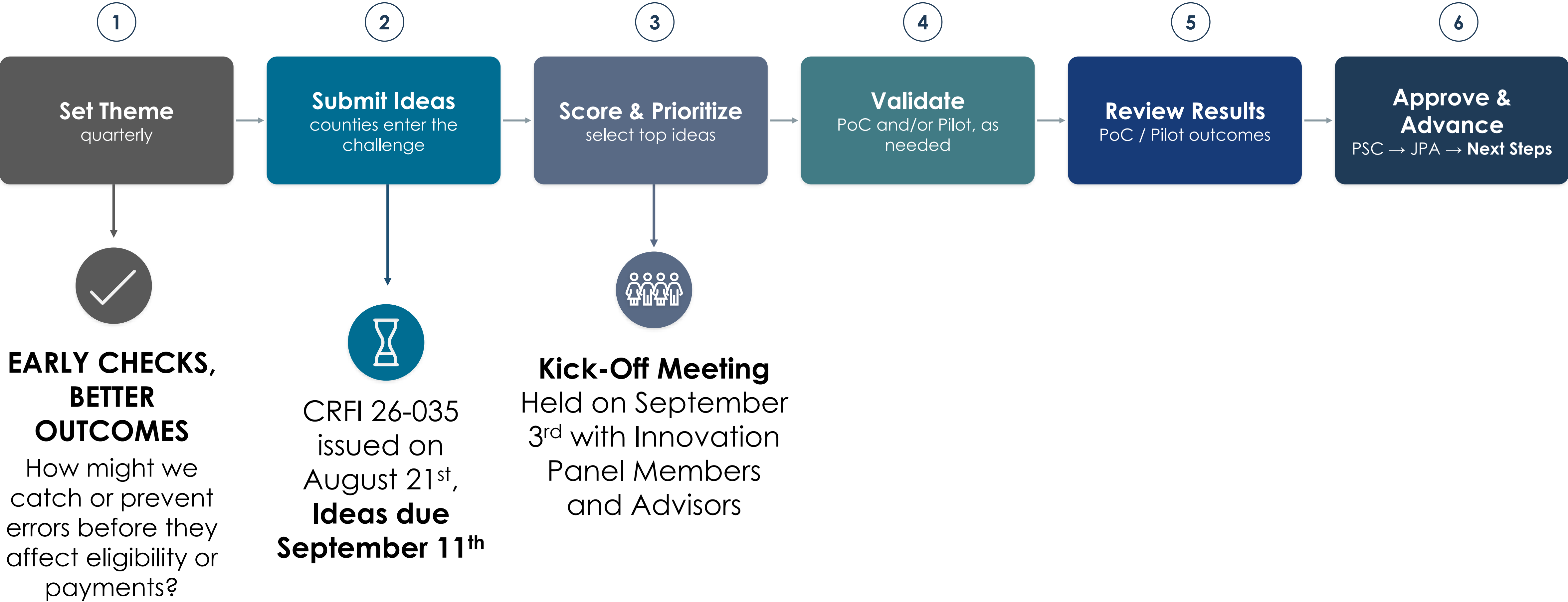
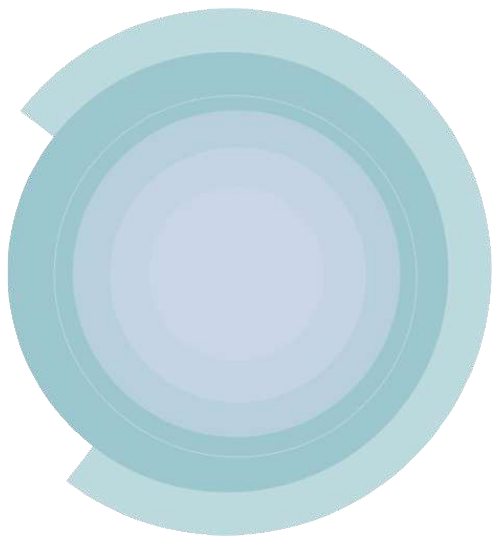
Move as Quickly as Possible

The sooner this executes, the sooner the business impact — for counties and the Consortium — is realized.

Innovation Update

CalSAWS Innovation

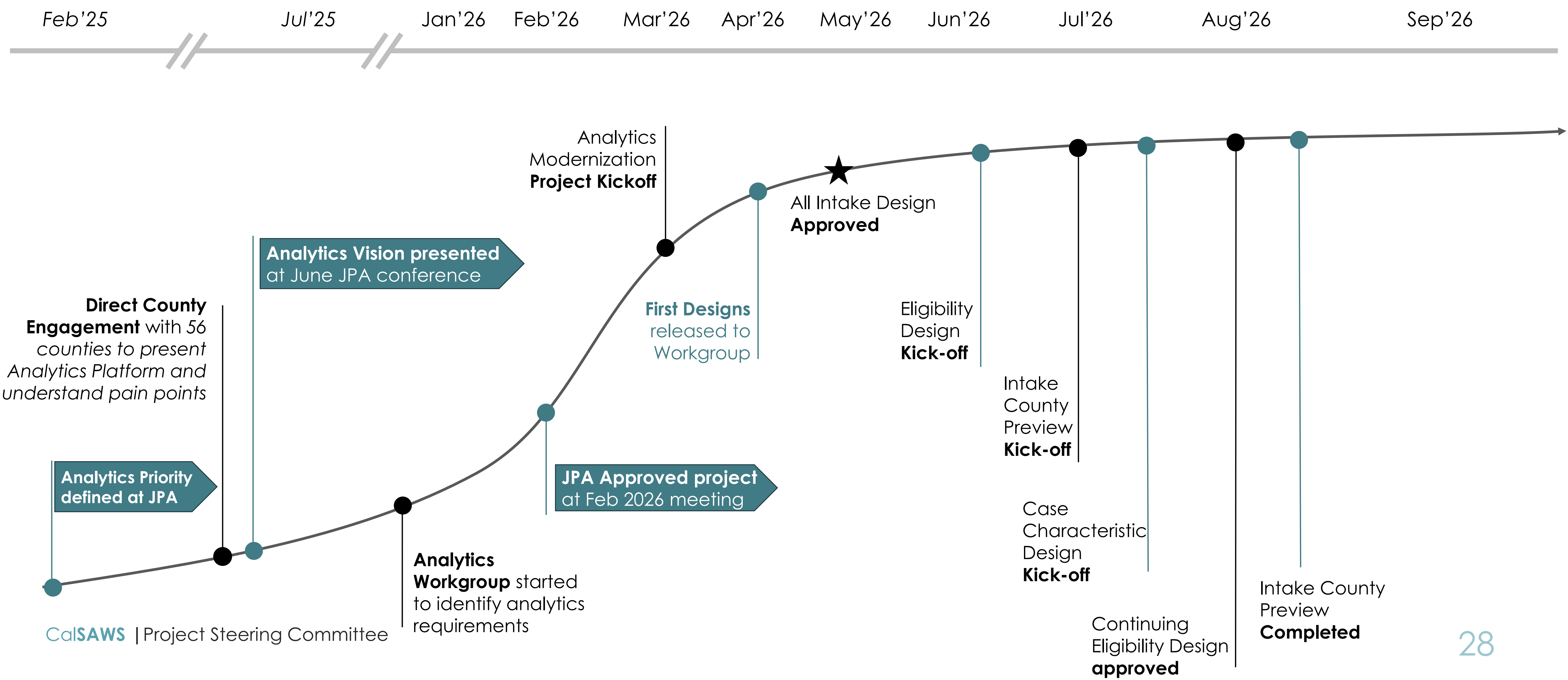
Status Update



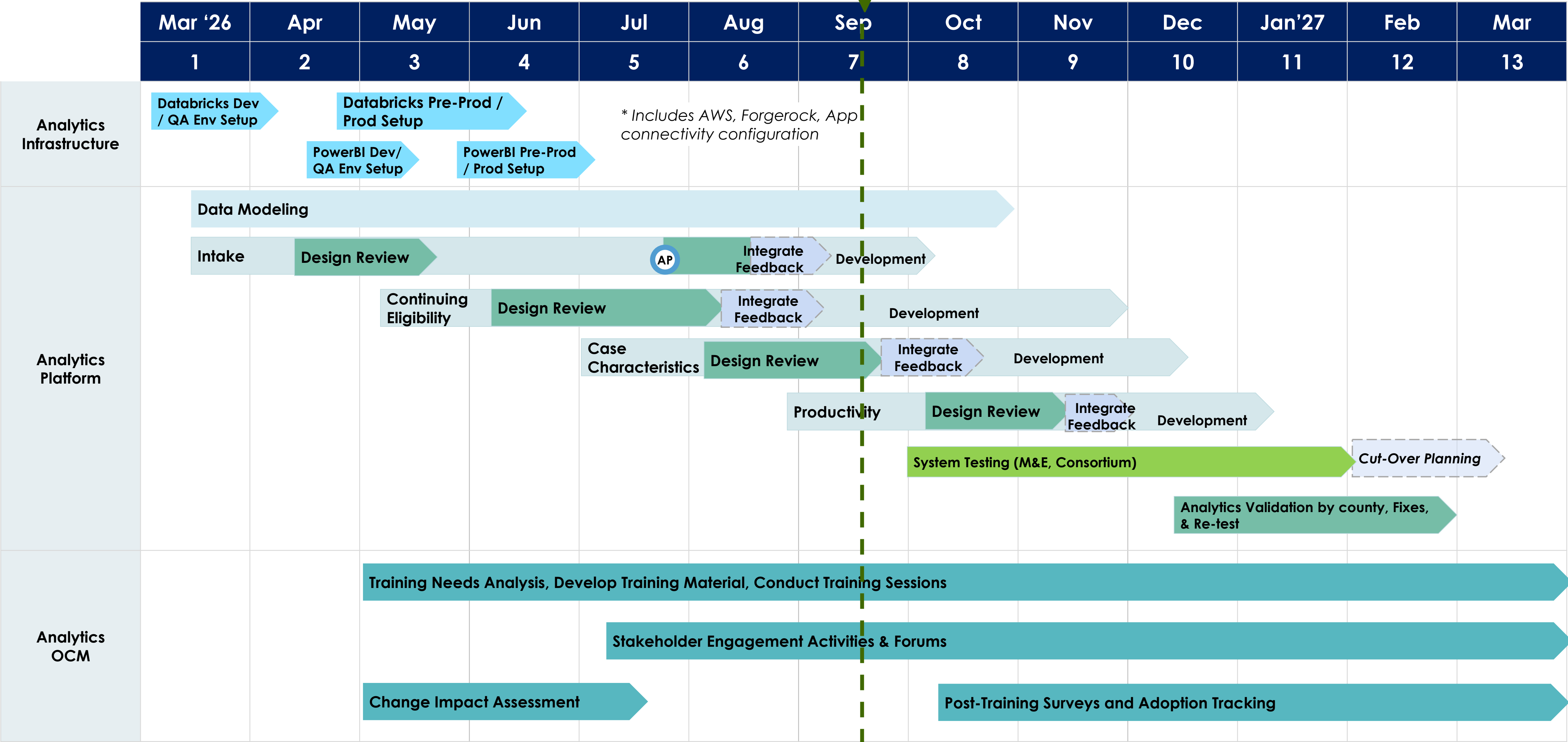
Analytics Update

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

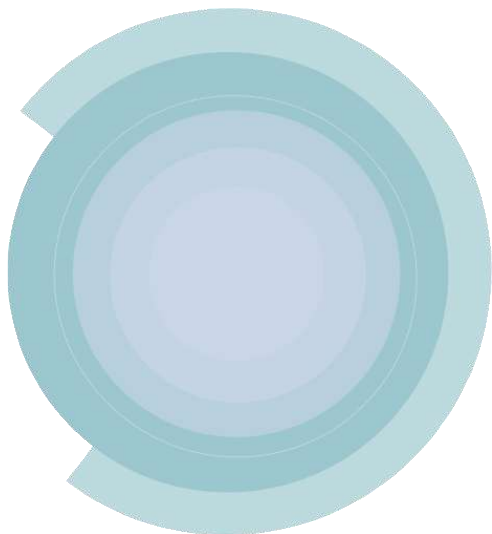


Phase 1 Execution Timeline - NEW



Target Release 27.03.XX (04/15/2027)

Subject Area – Sprint Status



Highlights Since Last JPA:

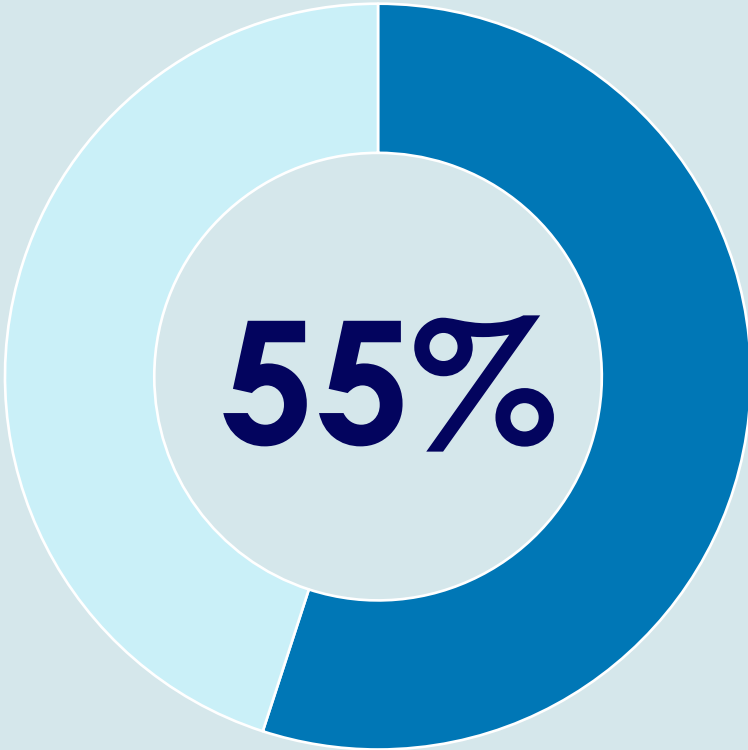
- Design for the **Continuing Eligibility** is **100% complete**
- County preview for **Intake** wrapped up successfully
- Design for **Case Characteristics**

Domain	Sprint	Status
Intake	Design/Development/Test	100% Complete
	County Preview	100% Complete
Continuing Eligibility	Design	100% Complete*
	Development	80% Complete
	Test	30% Complete
Case Characteristics	Design	70% Complete

County Engagement: Continuing Eligibility

 **915**

Total responses across **6 regions**

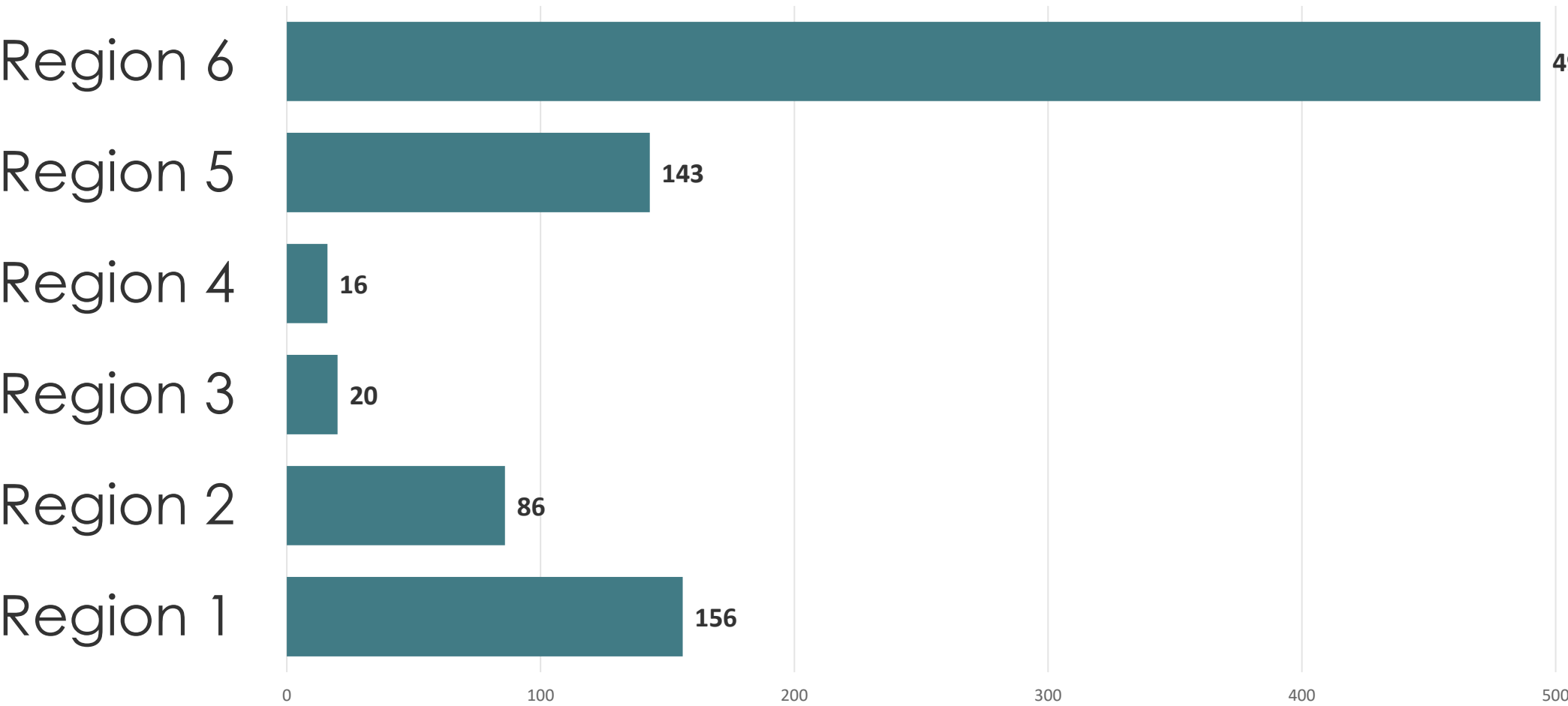


of responses came from Operations Managers

 **30**

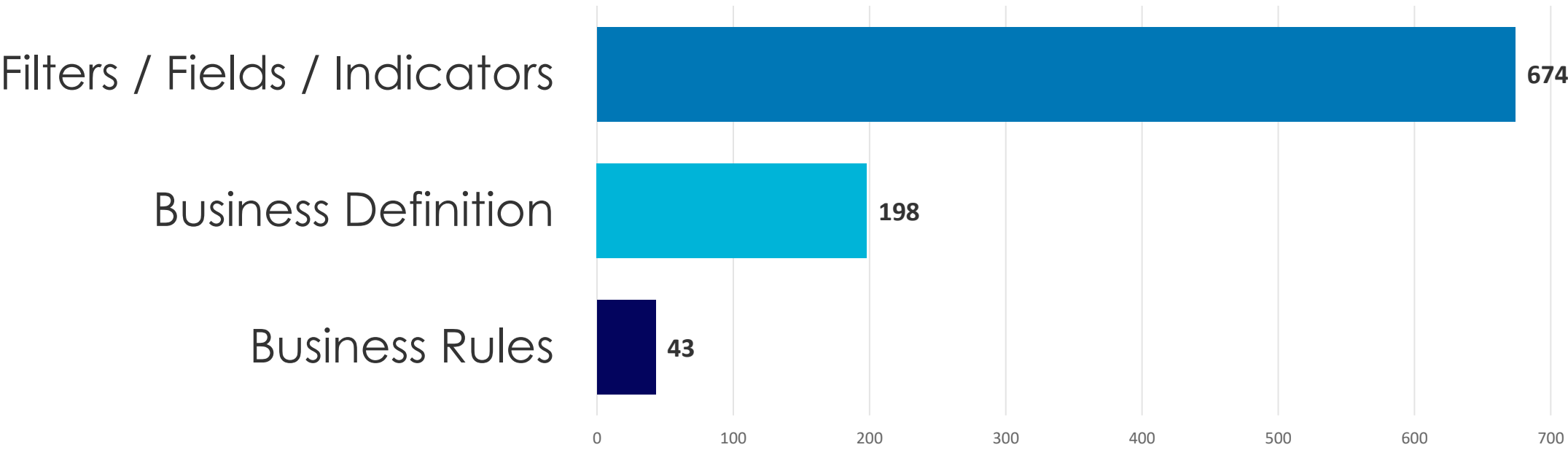
Total workgroup sessions conducted

Responses by Region



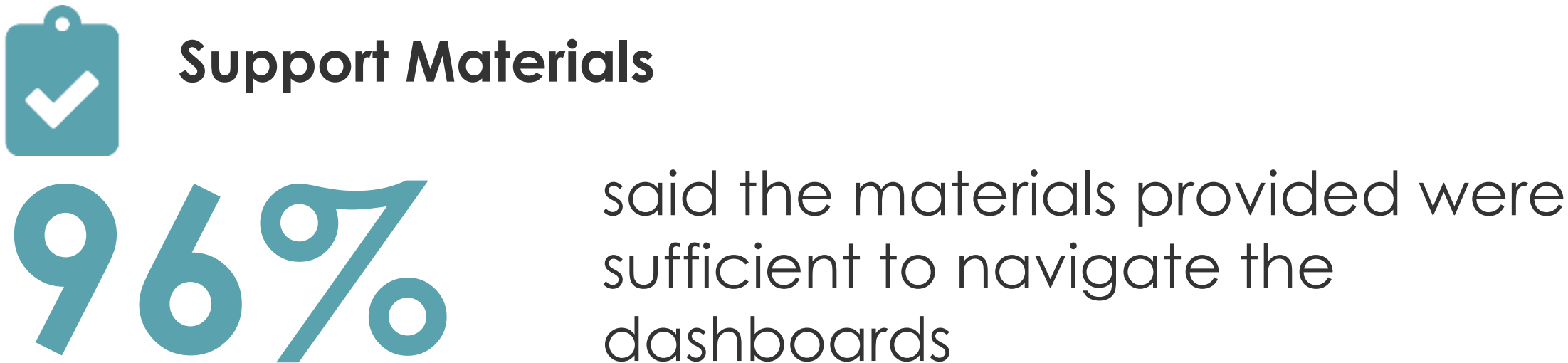
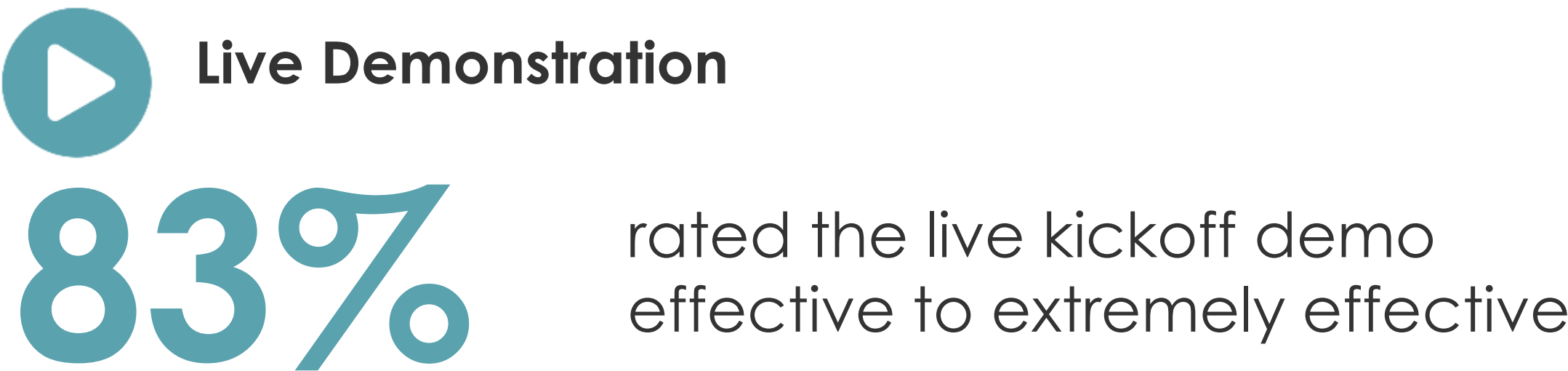
Region 6 drove more than half of all responses (**494 of 915**).

Top Suggestion Themes



- **Filters / Fields / Indicators** — more filters, drill-downs & clearer labels
- **Business Definition** — clarify how time & aging are calculated
- **Business Rules** — clarify calculation & roll-up logic

Intake Module Preview Feedback from Counties



Ongoing Support Preference

Top request: Office Hours, then Live Demonstrations and Quick Guides.

Little interest in web-based training, and none in email or newsletters.

Support Format Preference



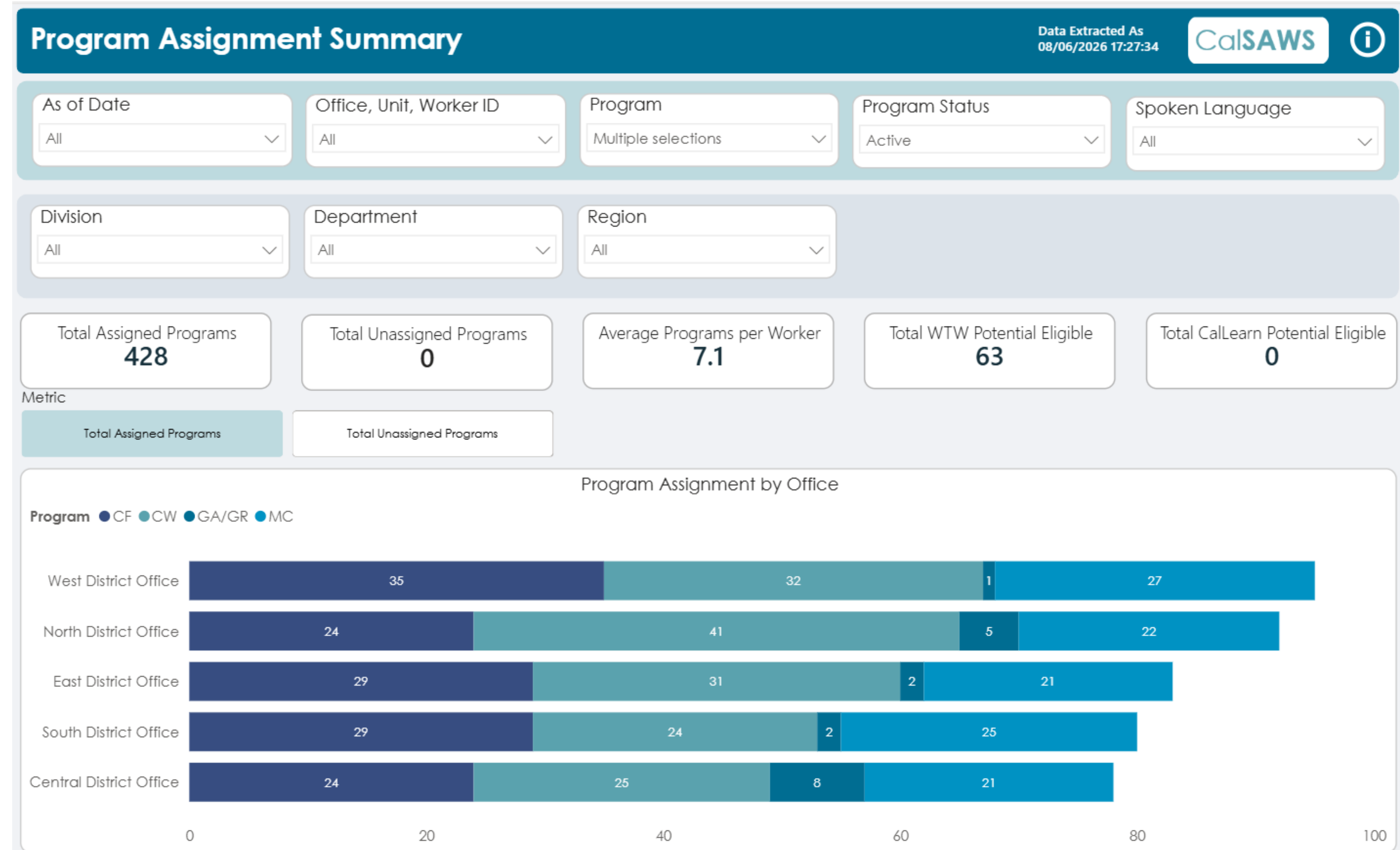
Suggestions

1. Offer pre-recorded demos so counties can learn on demand
2. Extend the testing period to allow more time for upskilling (aligns with our adjusted approach)
3. Expand the audience, especially for specialty programs

Sample – Program Assignment Summary

At a Glance:

- What is my caseload distribution by office?
- What programs are unassigned and need action?
- What is the average workload per worker?
- Who needs to be engaged in WTW?
- Who can be engaged in CalLearn?
- Filters allow quick analysis
- Detail tabs with more information



Risk 332

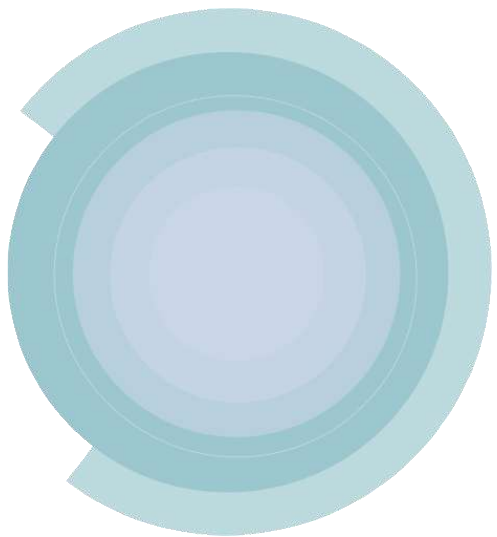
Limited County review capacity may impact Analytics Modernization Delivery Schedule

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 Action Items



Action Item	Owners	Due	Status
Report out on the process for counties to report back on county validation for Analytics.	Rajesh Tahaliyani	September 2026	Open

Truv Status Update



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

BenefitsCal

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](#)

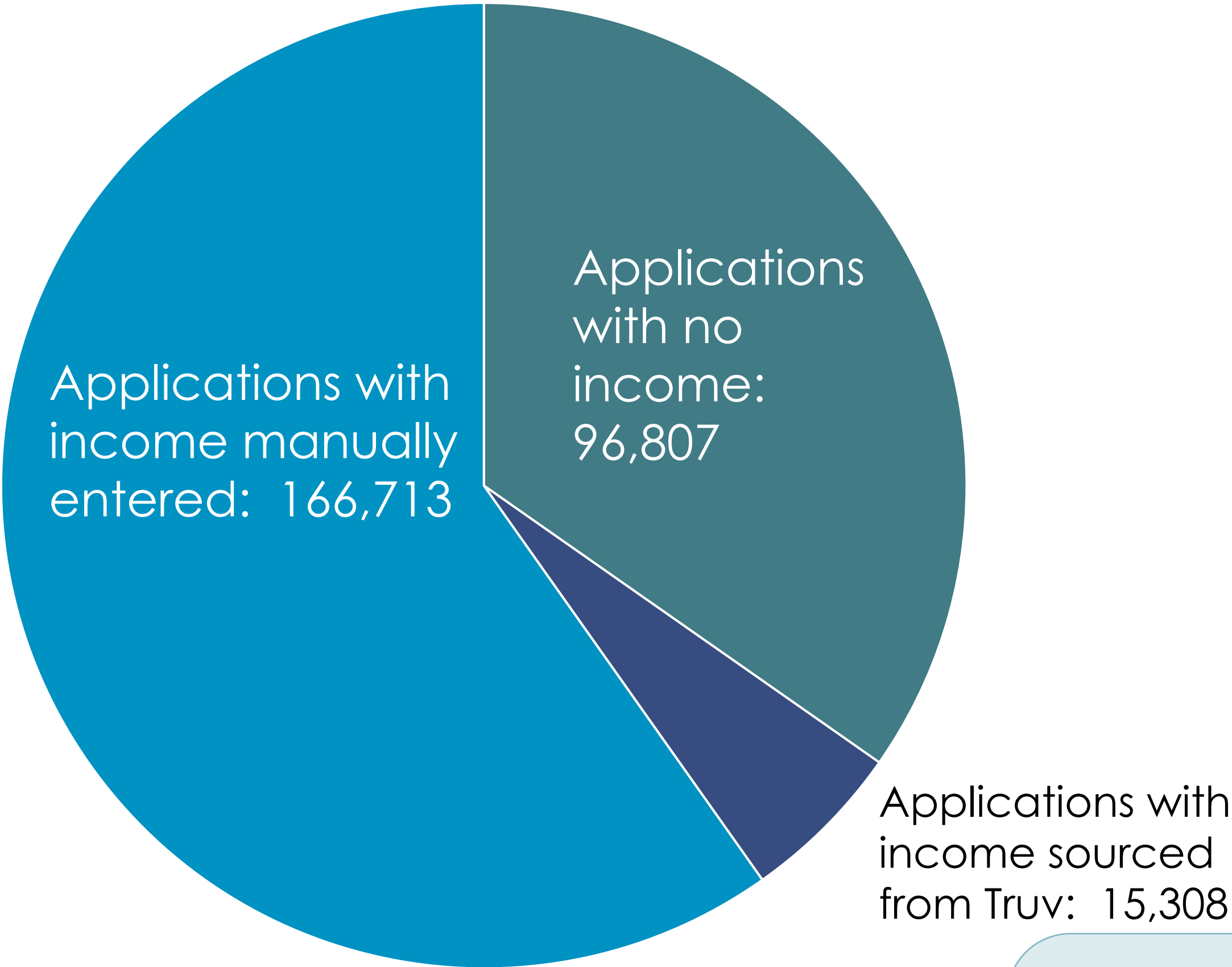
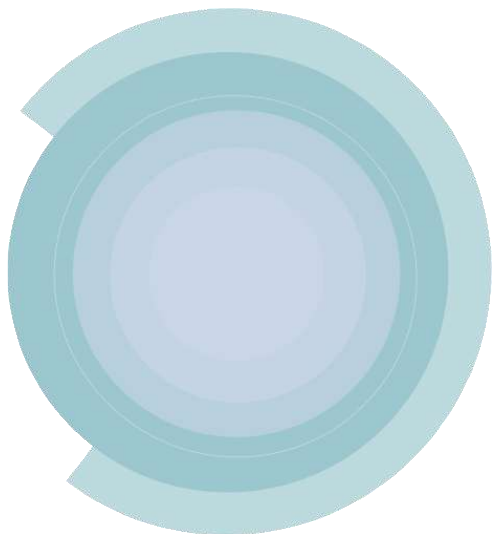
 Review

 Remove

Release Date: 07/19/2026

26.07 Production Release Update - Truv

Truv Metrics for Applications: July 19,2026 – September 2, 2026

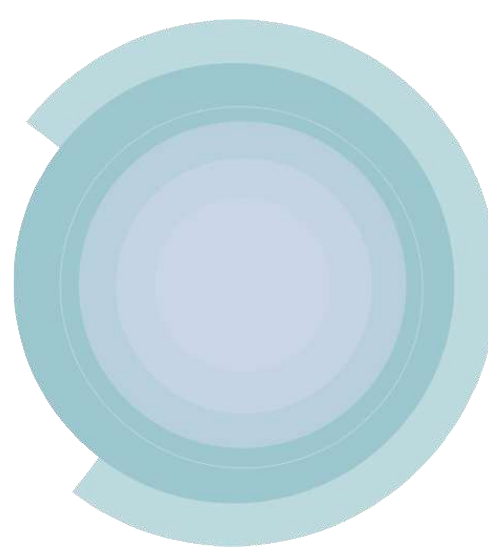


~65% of applicants entered income on their submitted application

~8% of applicants, who entered income information, used Truv to report income

- Applications submitted in BenefitsCal since Truv Go-live: 278,828 (submitted over the same period last year: 246,325)
 - 182,021 applications submitted reported income. 15,308 used Truv and 166,713 entered their income manually.

26.07 Production Release Update - Truv





Issue Identified on 7/29/2026

- Priority release deployed on August 7, 2026 to resolve the issue. Pay stubs submitted **after** August 7, 2026 are being sent to CalSAWS Imaging
- Completed reprocessing of paystubs on August 27, 2026 and provided lists to counties

BenefitsCal / CalSAWS Impact

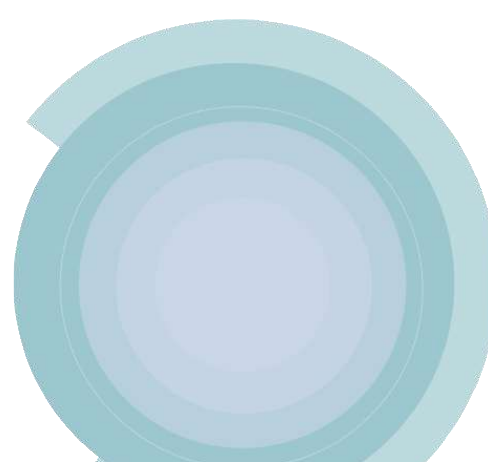
- 
- Application Truv Income data transferred, but paystubs were not transferred into CalSAWS Imaging for the county workers to review within CalSAWS

BenefitsCal Correction Action

- 
- The file path was incorrect; it did not match the Truv specification (8/7 fix)
 - Developed and deployed a tool to re-request historical paystubs (7/19/2026-8/7/2026). For submitted applications, the paystub were sent to CalSAWS Imaging.

Application Type	Total Paystubs	Re-processed	Error	Remaining
Submitted	6,039	5,792	247	0
In-flight	2,984	2,847	137	0

26.07 Production Release Update - Truv



**Issue Identified
on 8/14/2026**

- Issue occurred in BenefitsCal where Truv income frequency is hard-coded to “Monthly” in certain scenarios related to Payroll information.
- CSPM-85137 deployed to production on 9/3/26 to resolve the hard-coded frequency issue

BenefitsCal / CalSAWS Impact



Customer reviewed data from Truv is being modified upon saving to the application in certain payroll data scenarios to update the pay frequency to “Monthly”, which is sent to CalSAWS.

BenefitsCal Apps with Truv Payroll



Total Records Sent to CalSAWS with Payroll info
13,960



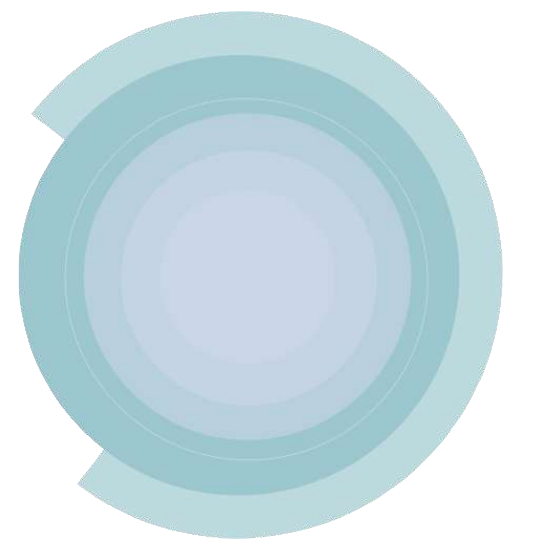
Percentage of Payroll records with “Monthly” frequency
90.5%

BenefitsCal Correction Action and Open Items



- CSPM-85137 was deployed on 9/3/2026 to remove “Monthly” hard-coding logic so that future transactions will be sent with the income frequency that Truv provides

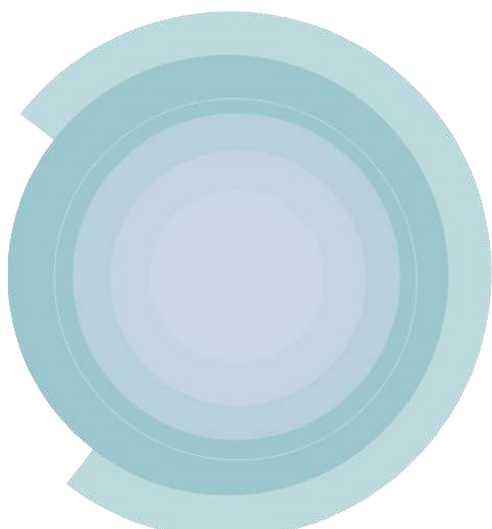
26.07 Production Release Update - Truv



Other Actions:

- Additional updates have been provided to the counties on September 1, 2026, including:
 - Distributed guidance from CDSS regarding interim procedures for use of Truv Income Verifications
 - Issued an Informational alert/One-Pager for county workers regarding reviewing Truv income information in CalSAWS
 - Revised and reissued CIT 0117-26 CA-297470 Truv Income Verification Phase 1 Job Aid to clarify the new Truv data fields in CalSAWS
- Removed the Truv announcement from the BenefitsCal homepage

26.07 Production Release Update - Truv



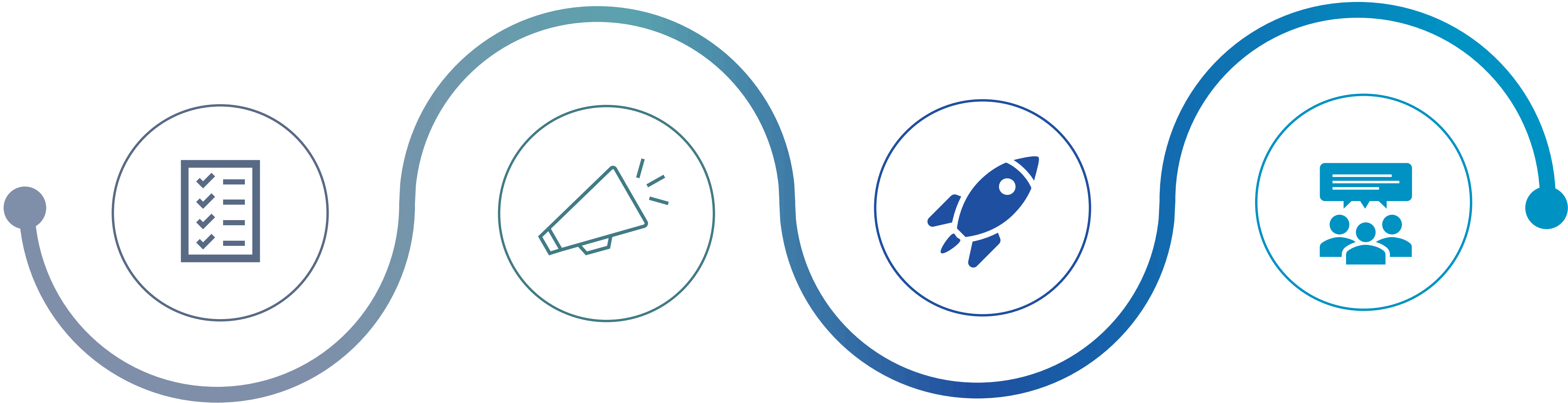
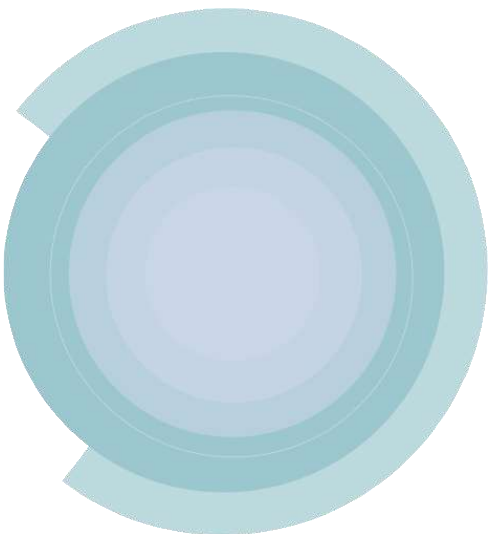
Action Item #4 Recap from August 20, 2026 PSC:

Action Item Description	Status	Update
Research/implement more robust error handling to reduce errors in the future	Closed	Error handling was added as a part of the 8/7/2026 fix for paystubs failing to transfer to CalSAWS. Additional error handling will be added during the Truv Phase 2 implementation.
Research adding a ribbon/banner so that workers know that they need to be more thorough	Closed	The existing Announcements functionality on the CalSAWS Homepage can be leveraged to communicate widespread issues for future TRUV implementations. Additional guidance was provided to counties on September 1, 2026 as described in a prior slide.
Provide a breakdown by county of how many cases were impacted by the pay frequency conversion issue	Closed	Provided lists to counties prior to and after the implementation of the code fix for this issue on September 3, 2026.
Research feasibility of messaging the customer to inform them that there are some issues happening and the county may need to contact them to clarify some of the information.	Closed	A decision was made to remove the Truv announcement from the BenefitsCal home page. General announcements can be added in the future, if necessary, regarding any potential issues.

Release and Policy Update

Release Update

Upcoming Major Release 26.09



TESTING

System Test, QA, and County Validation are in progress

RELEASE COMMUNICATION

Major Upcoming Changes (MUC)

Draft: 07/24/2026
Final: 08/28/2026

Webcast: 09/01/2026

Newsletter and Release Notes: 09/02/2026

DEPLOYMENT

Greenlight: 09/16/2026

Deployment: 09/20/2026

POST RELEASE

Post-Release Daily calls:
09/21/2026 – 09/23/2026

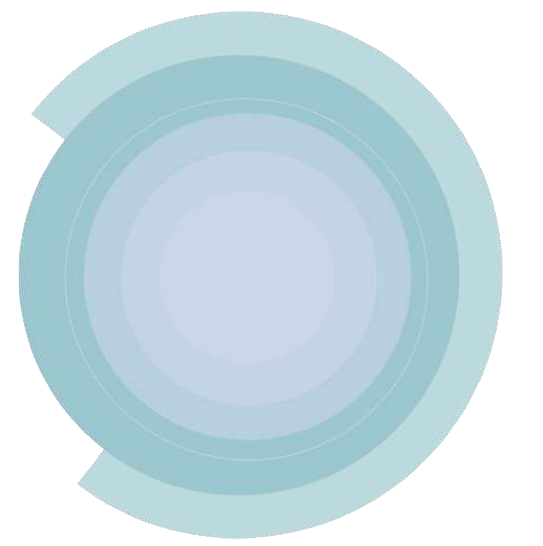
Note: approx. hours per release include Premise + Baseline Hours.

Release Update

Upcoming Major Release 26.09 - Release Highlights

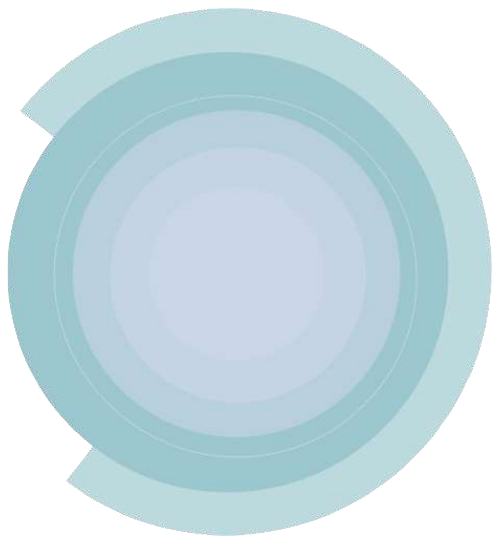
- CA-280419 - Add NA 274I and J to the CalSAWS Overpayment Packets
- CA-296514 & CA-293075 - Workload Management Redesign Phase 2
- CA-298982 - ABAWD Enhancement HR1 Workgroup - Update ABAWD and Work Registration Determinations
- CA-297005 - CalFresh Processing HR1 Workgroup - Automated System Error Reviews (Phase 2)

Refer to Major Upcoming Changes attachment for a detailed list of all SCRs in the release.



Release Update

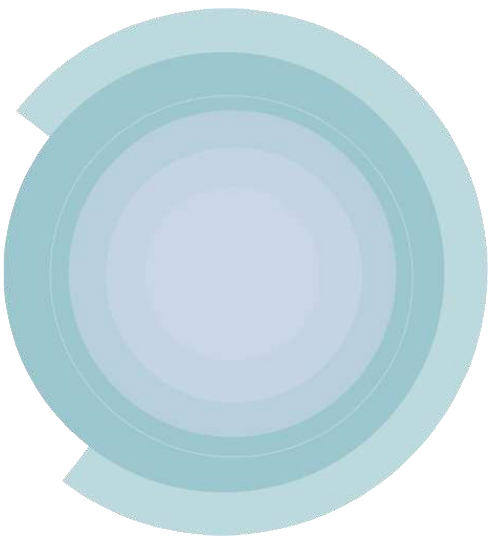
Additional Upcoming Releases



September & October Priority Releases 45 SCRs ~23k hrs	November Baseline (11/23/2026) 108 SCRs ~54k hrs.	December Priority Releases 24 SCRs ~8k hrs.
9/10/2026: - CalFresh COLA and CalWORKs (CW) IRT Values for 2026-2027 (CA-290478) 9/12/2026: - CalFresh COLA and CalWORKs (CW) IRT Batch EDBC Run for 2026-2027 (CA-290540)	11/23/2026: - CMSP Eligibility Changes (CA-300677) - CalFresh Processing HR1 Work Group - Targeted nudges and navigation improvements (CA-296573) - Create new page to display Skipped Issuances (CA-274867) - Add Threshold Languages for TNB 4 Recertification Packet AND Add Additional Forms to the TNB RE Packet (CA-256864)	12/XX/2026: 2027 CAPI COLA Values (CA-290706) 2027 CAPI COLA Batch EDBC Run (CA-290707) 2027 State Minimum Wage Values (CA-290458) 2027 State Minimum Wage Batch EDBC Run (CA-290456)

Note: approx. hours per release include Premise + Baseline Hours.

Medi-Cal 2025-26 State Budget Policy Roadmap*



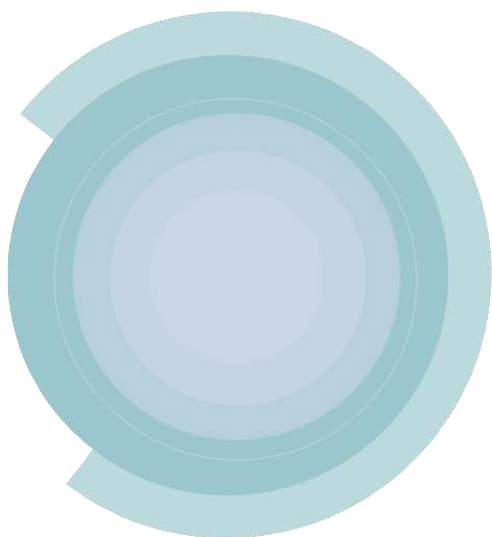
■ In Progress ★ **Target Go-Live / Release Version**
** Target releases are subject to change.*

System Change Requests	Policy Effective Date	Sep 2026	Oct 2026	Nov 2026	Dec 2026	Jan 2027	Feb 2027	Mar 2027	Apr 2027	May 2027	Jun 2027
CA-300289 - Return Mail File Transfer Changes and Updates - Phase 2 and Re-enable Implementation	8/7/2025	Test 26.09★									
CA-294491 - ACWDL 25-33: Implementation of State-Funded Aid Codes for Monthly Premiums for Individuals with UIS	1/1/2027	Test 26.09★									
CA-291157 - ACWDL 25-33: Monthly Premium for Adult Members with Unsatisfactory Immigration Status	7/1/2027	Design			Development				Test 27.06★		

WE ARE HERE

**Target releases are subject to change.*

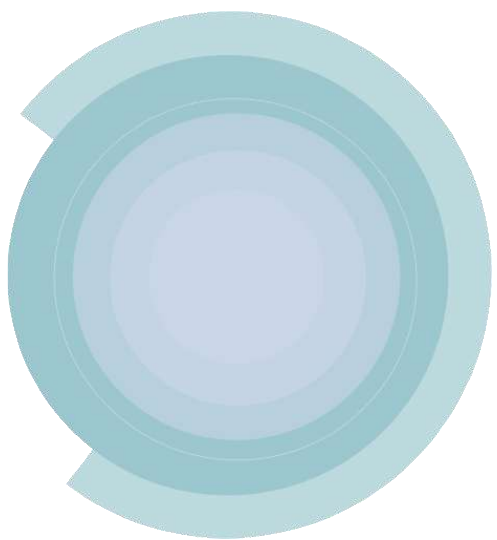
Medi-Cal HR-1 Policy Roadmap



In Progress ★ **Target Go-Live / Release Version**
** Target releases are subject to change.*

System Change Requests	Policy Effective Date	Sep 2026	Oct 2026	Nov 2026	Dec 2026	Jan 2027	Feb 2027
CA-292586/CSPM-80928 - Work and Community Engagement Requirements for New Adult Group	1/1/2027	Test 26.09★					
CA-292582/CSPM-80929 - Six-month Redeterminations for MAGI New Adult Group*	1/1/2027 * 6-month REs – March REs initiated in 1/2027	Test 26.09★					
CA-300239 - H.R.1 - Restricting Federal Funding for Certain QNCs Phase III	10/1/2026	Test 26.09★					
CA-286076 – NCOA: Update the Address Prior to Mailing When an Address Change is Reported by a Third Party	1/1/2027	Development	Test 26.11★				
CA-294490 - Automated Discontinuance Process for PARIS and RVP Matches	1/1/2027	Development	Test 26.11★				
CA-298078 - Update the DHCS Reports with H.R.1 Updates	1/1/2027	Development	Test 26.11★				
CA-299032 – Update Management Reports with H.R. 1 Changes	1/1/2027	Development	Test 26.11★				
CA-296138 – Add Updated Medi-Cal Forms to Template Repository	1/1/2027	Development	Test 26.11★				
CA-300884 – H.R.1 Work and Community Engagement Requirements for New Adult Group Part II	1/1/2027	Design	Development	Test 27.02★			
CA-287689/CSPM-84620 - H.R.1 Pregnancy / Postpartum Enhancements & Six-Month Redeterminations Part II	1/1/2027	Design	Development	Test 27.02★			
CA-301329 - H.R.1 Hierarchy of Available Income Verification Sources	1/1/2027	Design	Development	Test 27.02★			
CA-301602 - eHIT: Expansion of Equifax Incarceration and Release Data Elements	1/1/2027	Design	Development	Test 27.02★			

Medi-Cal HR-1 Policy Roadmap



 In Progress ★ **Target Go-Live / Release Version**
** Target releases are subject to change.*

System Change Requests	Policy Effective Date	Sep 2026	Oct 2026	Nov 2026	Dec 2026	Jan 2027	Feb 2027	Mar 2027	Apr 2027	May 2027	Jun 2027	Jul 2027	Aug 2027	Sep 2027	Oct 2027	Nov 2027	TBD
CA-303824 – H.R.1 Work and Community Engagement Requirements - Phase 4	1/1/2027			Design			Development			Test	27.06★						
CA-293024 - National Database for Duplicate Aid Verification	10/1/2029								Design			Development			Test	27.11★	
CA-293433/CSPM-81631 - Cost Sharing for Expansion Adults	10/1/2028																TBD
CA-303191 – Automation of Updated MCP Member Address	10/1/2028																TBD

WE ARE HERE

MC HR 1 and VLP Risks

Project Watch Items

Risk 326

- CalSAWS 26.09 and CalHEERS integrated test completed. BenefitsCal 26.11 WCER design completed.
- Risk trending downward

Risk 333

- CalSAWS and CalHEERS integrated test in progress
- Risk closure recommended

Risk 326

Lack of timely policy guidance may impact Medi-Cal H.R. 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.

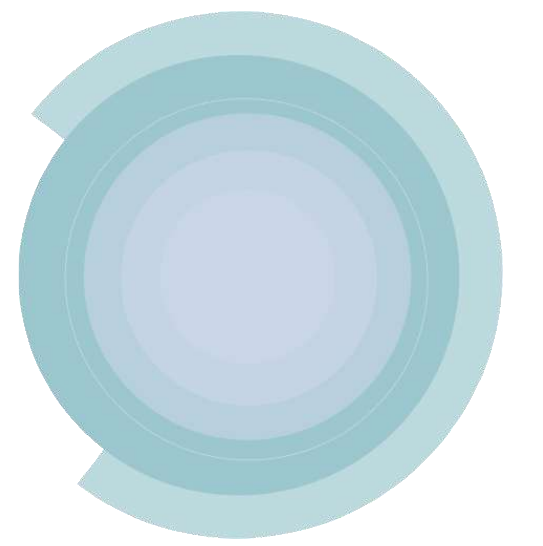
Risk 333

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.

Medi-Cal Policy Updates



■ **Medi-Cal H.R. 1**

- DHCS understands the significant impact that H.R. 1 will have on our communities. However, to ensure that federal funds continue to support the entirety of Medi-Cal, we anticipate becoming partially compliant with some components of the H.R. 1 IFR.

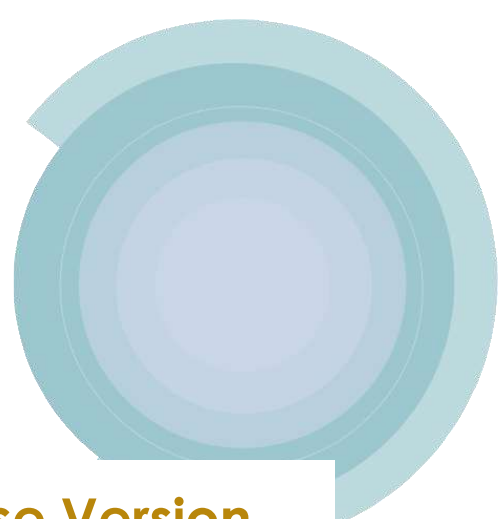
■ **26.09 H.R. 1 Training and Resources including**

- ❖ CalSAWS Standalone 26.09 Webcast for WCER and 6 mo REs
- ❖ CalSAWS Quick Guides and OCM material
- ❖ DHCS Support Calls including DHCS policy, CalSAWS and CalHEERS presentations and demos
- ❖ Coordinated OCM Flows

■ **27.06 CA-303824 - H.R.1 Work and Community Engagement Requirements - Phase 4**

- Continuing to define IFR changes with DHCS/CalHEERS/BenefitsCal/CovCA/CWDA

CalFresh May Revise & HR-1 Policy Roadmap*



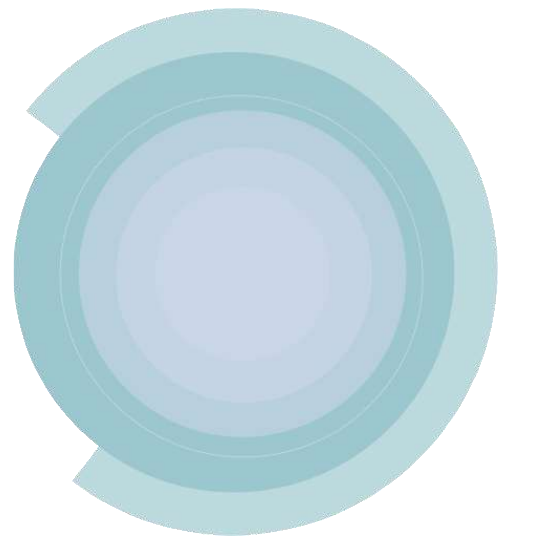
In Progress ★ **Target Go-Live / Release Version**
** Target releases are subject to change.*

System Change Requests	Policy Effective Date	Sep 2026	Oct 2026	Nov 2026	Dec 2026	Jan 2027	Feb 2027	Mar 2027	Apr 2027	May 2027	Jun 2027	Jul 2027
CA-302736 - Renewed ABAWD Waiver for Colusa, Imperial, Kings (New), Merced, Monterey, Plumas, and Tulare and Transition for Alpine	11/1/2026	★ 26.09.10										
CA-290478 -2026-2027 CalFresh COLA and Update CalWORKs IRT Levels for 2026-2027	10/1/2026	★ 26.09.10										
CA-299610 - Add ABAWD Summary Page	11/1/2026	Test 26.09 ★										
CA-299906 - Additional Journal Entries for ABAWD Related Actions	11/1/2026	Test 26.09 ★										
CA-299967 – Re-enable PVS Automation	12/1/2026	Test 26.09 ★										
CA-300683 - ABAWD Discretionary Exemption Report - Interim Solution	11/1/2026	Test 26.09 ★										
CA-296399 - Update SUAS Logic for ICT cases and LIHEAP Income	7/4/2025	Test 26.09 ★										
CA-296429 - Integration of the Work Number – Phase 1	10/1/2026	Test 26.09 ★										
CA-298517/CSPM-83660 - Truv Income Verification Integration Phase 2a (Off-State)	12/31/2026	Development	Test 26.11 ★									
CA-299535 - ABAWD Discretionary Exemption Tracking – Long Term Solution	11/1/2026	Design	Development		Test 27.01 ★							
CA-302266/CSPM-83660 - Truv Income Verification Integration Phase 2b (On-State)	12/31/2026	Design	Development		Test 27.01 ★							
CA-300464 - Work Number Integration – Phase 2 - Prevent EDBC processing until report is verified by a worker.	3/1/2027		Design		Development		Test 27.03 ★					
CA-299026/CSPM-84656 – Truv Income Verification Integration Phase 3	1/01/2026				Design		Development		Test 27.05 ★			
CA-288562 - CFAP Expansion Phase 1	10/01/2027				Design			Development			Test 27.07 ★	

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CalFresh Policy Updates

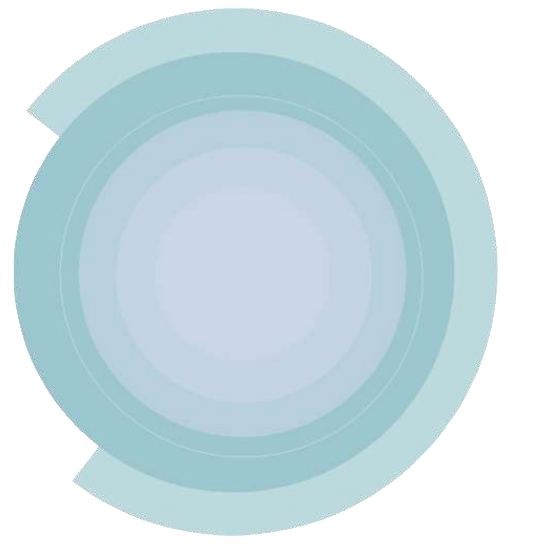
Key Updates (26.07) 9/10/2026



- **CA-302736** - Renewed ABAWD Waiver for Colusa, Imperial, Kings (New), Merced, Monterey, Plumas, and Tulare and Transition for Alpine
- **CA-290478** - 2026 -2027 CalFresh COLA and Update CalWORKs IRT Levels for 2026-2027

CalFresh Policy Updates

Action Items



- **Request to move the ABAWD 377.11A Informational Notice to an earlier release than 10/8/2026**
 - The CalFresh Policy Team met with Riverside County to discuss the notice and it was determined that the scheduled release is acceptable.

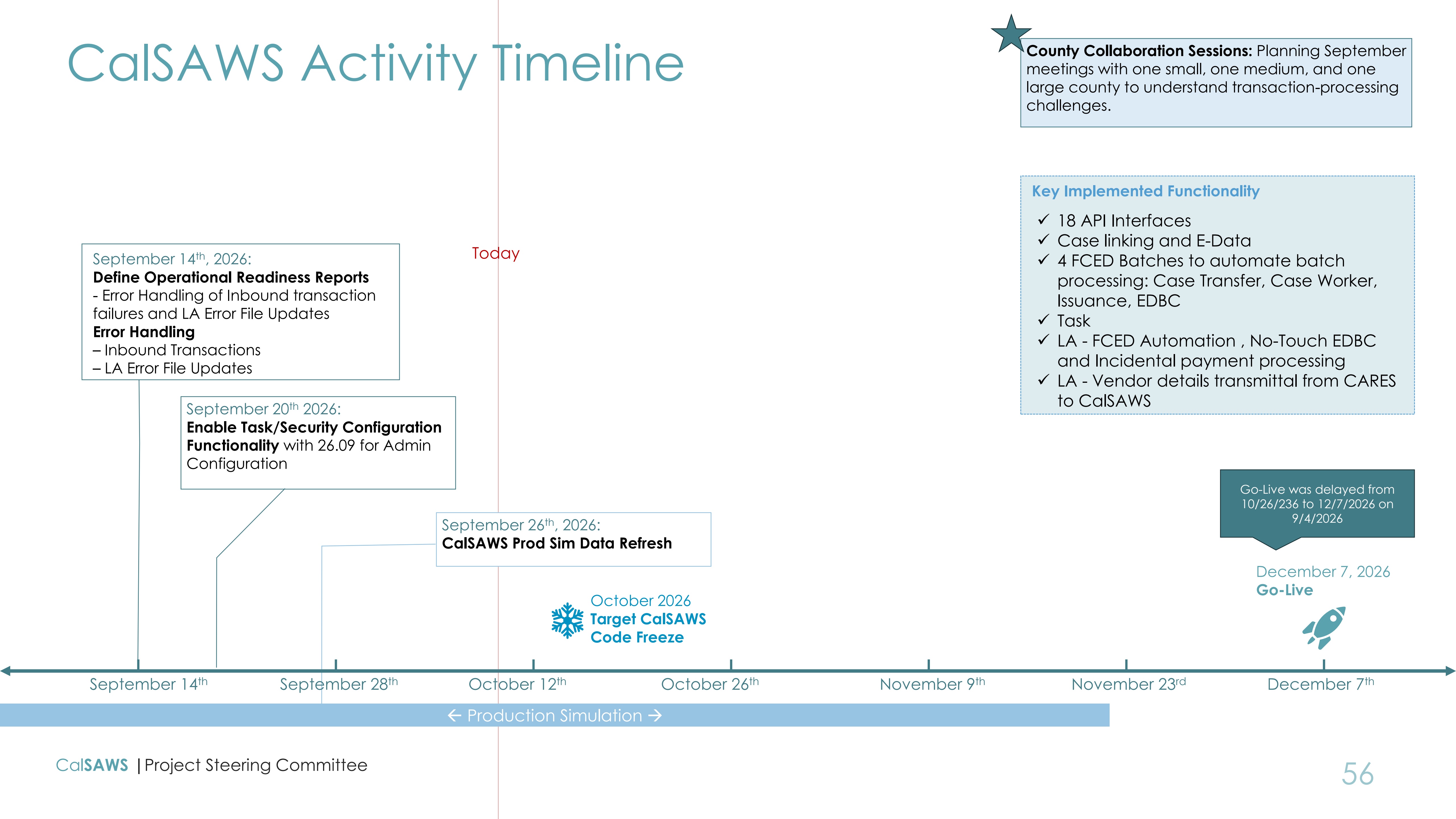
FCED Update

CalSAWS Activity Timeline

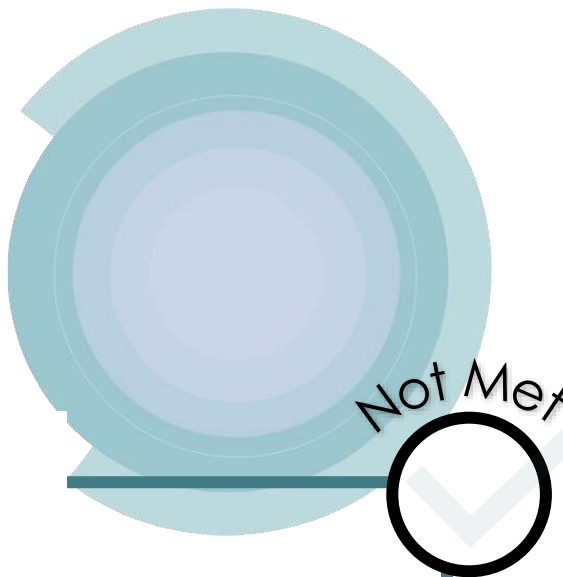
**County Collaboration Sessions:** Planning September meetings with one small, one medium, and one large county to understand transaction-processing challenges.

Key Implemented Functionality

- ✓ 18 API Interfaces
- ✓ Case linking and E-Data
- ✓ 4 FCED Batches to automate batch processing: Case Transfer, Case Worker, Issuance, EDBC
- ✓ Task
- ✓ LA - FCED Automation , No-Touch EDBC and Incidental payment processing
- ✓ LA - Vendor details transmittal from CARES to CalSAWS



Readiness Criteria Dashboard



Pre-Linked Cases	
Criteria	Status
CARES defect fixes received and re-tested	At Risk – trending down
Handling of residual unmatched records determined	In Progress
County instructions documented and shared	Not Started
Go-Live conversion activity timelines and milestones established	In Progress

Change Control & Code Freeze	
Criteria	Status
Lockdown of CRs that are a must have for go-live	At Risk – trending down
All functionality discussions closed out with clear exit and interim alternate procedures as needed	At Risk
LA Vendor Extract Functionality Tested and Signed off by the County	At Risk – trending down
Prod Sim Testing is complete: findings are logged, dispositioned, and resolved	In Progress

Performance & Operations	
Criteria	Status
Performance Test complete, Must Have findings Resolved, Results shared and agreed between CARES and CalSAWS	In Progress
Communications protocol established for planned and unplanned downtimes between CARES and CalSAWS	In Progress
CalSAWS Implementation Plan Reviewed and Approved	In Progress
CalSAWS Risks and Issues tracking to go-live	In Progress

OCM	
Criteria	Status
Planned demos Complete and resources shared	In Progress
All OCM resources made available for county access	In Progress
County Go Live Readiness Received	In Progress

Business & System Impact

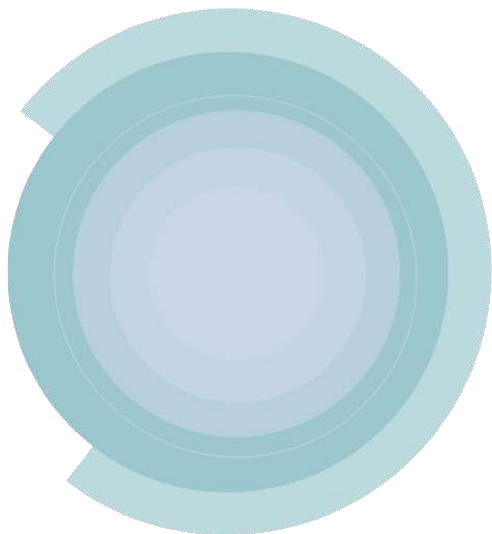
'At Risk-CARES Dependency' Items

County Workload could increase to manually address issues with identified alternate procedures.

Placements and Issuances may be affected by receiving bad or delayed data from CARES

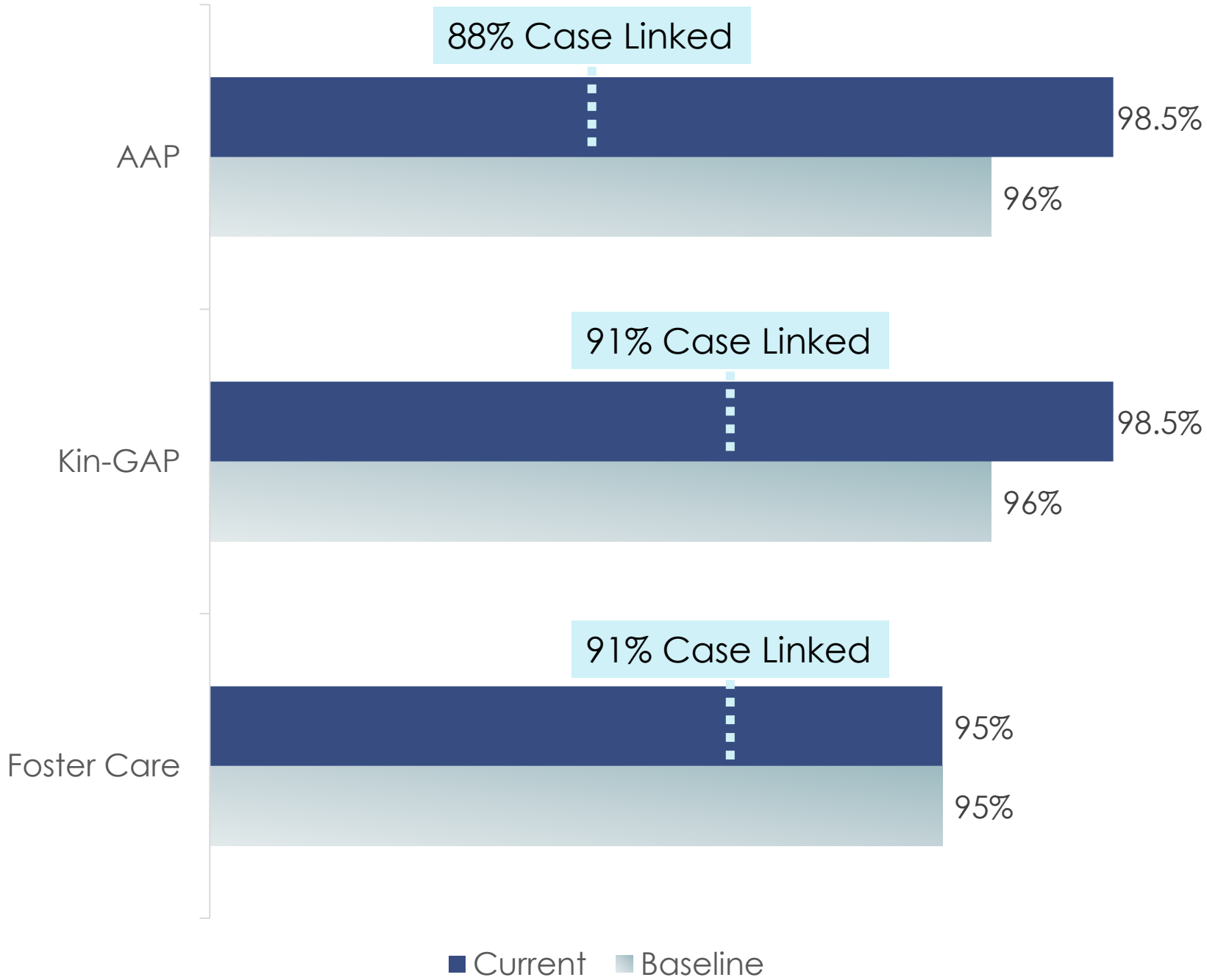
Data Integrity Issues may increase between the two systems if not manually resolved or cases are not linked between the two systems

Pre-link Cases, FCR & Vendor Extract Readiness



Objective: Meeting baseline match rates, closing 7 Functional Change Requests (FCR), and resolving 8 Vendor Extract issues ahead of go-live.

Conversion Pre-link Case Metrics



Impact: Larger backlog of unmatched cases, **data integrity** gaps, and risk to benefits processing if unresolved.

Resolution Plan: CARES fixes ETA 9/4; cases linked by 9/11.

Functional Change Requests (FCR)

7 Must-Have FCRs Pending - spanning document/payee policy, AAP placement automation, and rate/address data, not prioritized for October.

Impact: Manual workarounds at go-live; added reporting to monitor exceptions.

Resolution Plan: Alternate procedures per FCR; target close-out **9/30**.

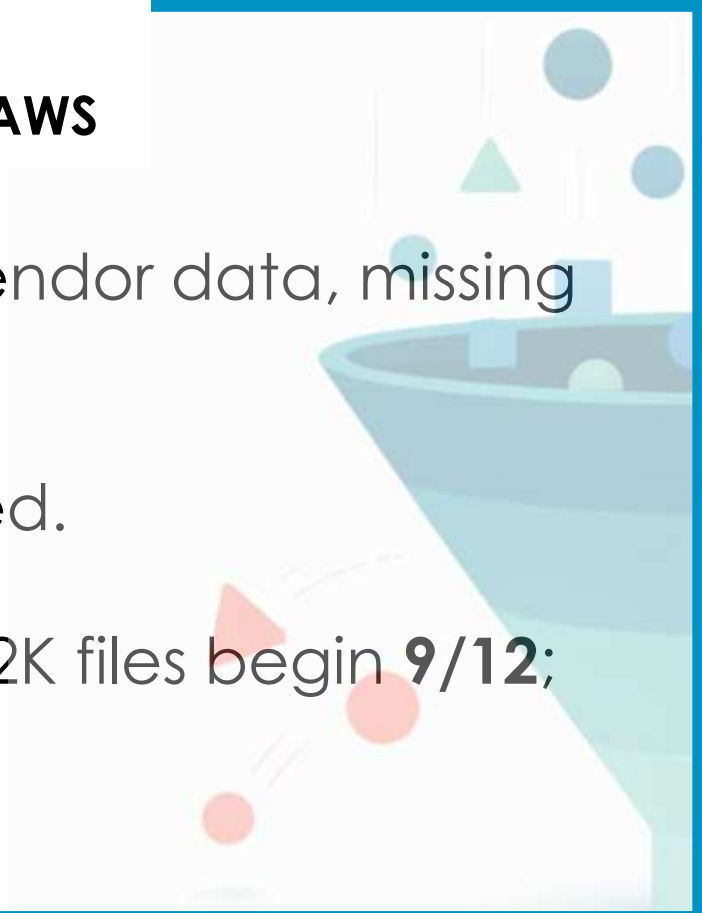
LA Vendor Extract

LA's process for sending vendor updates to CalSAWS

Issues: 8 Open Defects at CARES - address errors, invalid vendor data, missing production-volume file.

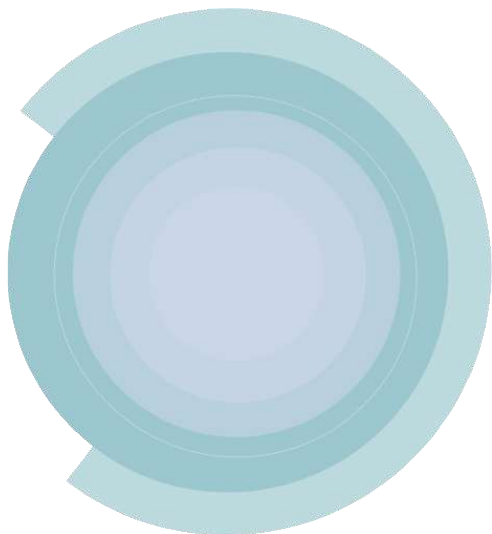
Impact to LA: Delayed payments; manual clean-up required.

Resolution Plan: Address issues resolved, retest **9/4**; regular 2K files begin **9/12**; follow-up with LA **9/10** on invalid vendor data.



Additional County Workload Impacts

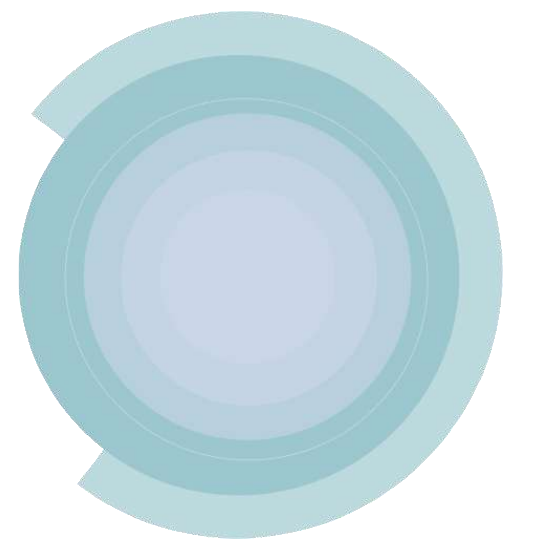
Four (4) issues in discussion with CARES and **must be resolved before go-live** - systemically or via alternate procedure.



Sev	Issue	Impact	Resolution Plan
H	Foster Care vs. AAP Child's Name	Incorrect child information on AAP records risks case confusion and data accuracy concerns.	CARES Fix planned. ETA 9/11/2026 (CARESV1-139626).
H	Historical APIs for Converted Cases	Unnecessary review and correction of irrelevant historical data increases county workload .	CARES evaluating effort/timeline for a fix. ETA: TBD.
H	AAP Person ID - Confidentiality Issue	Reusing FC Person ID for AAP at CARES creates confidentiality risk and complicate case tracking through API.	CARES has a story logged (CARESV1-134618). ETA: TBD.
H	Resource Name Mismatch Between Systems	Appears as a new vendor, requiring redundant county review and setup effort.	Resolution approach under discussion with CARES. ETA: 9/11.

Post-Go-Live Support Plan

Operational Change Management High-Level Plan



Office Hours:

Week 1: Open for drop in questions during business hours.

Week 2: Assess the frequency and duration of office hours

- All teams present
- Functional team will help answer functional related questions
- OCM will be present to help field questions and support as needed



Bug Reporting

- Incidents reported using ServiceNow
- Counties report issues on the hyper care call
- Issues are triaged and reported out.

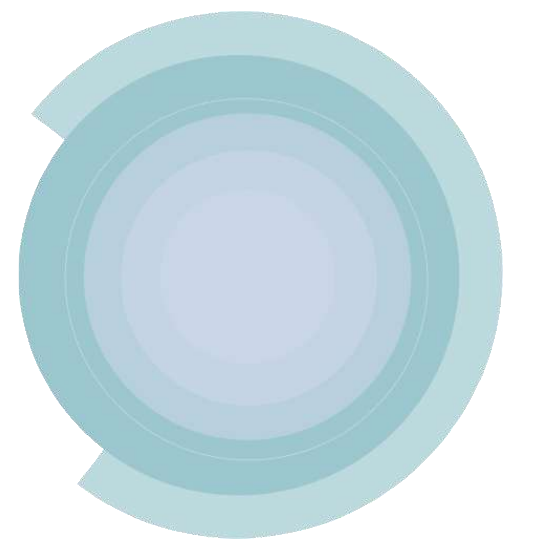
Escalation and Mitigation Plans are in development with CARES.

Go Live + 2 weeks

Objectives:

- ✓ Support adoption Readiness through final communications and reinforcement of key processes
- ✓ Issue Resolution to support continued business operations
- ✓ Maintain open support channels with the CARES project team for critical defects and issues
- ✓ Conduct Operational Health Checks and Reporting

FCED Risks / Issues



Issue 346

CARES is currently unable to transmit the Vendor Extract File in the Production Simulation environment and blocking LA County's validation of the functionality.

Mitigation Actions:

- CalSAWS will test with mocked data files to simulate processing; will support additional CARES testing once fixed.

Issue 345

Case-link match rates between new CWS-CARES and CalSAWS are below the prior CWS-CMS baseline match rates.

Mitigation Actions:

- CalSAWS continuing iterative testing/defect-remediation with CARES; validating fixes as received.

Issue 344

CARES QA unstable builds prevent the successful completion of QA test cycles.

Mitigation Actions:

- Re-evaluate CalSAWS QA access; CARES to improve build stability and reduce recurring defects.
- Use risk-based testing on high-risk, recently changed areas rather than full regression every build.

Risk 324

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

Mitigation Actions:

- Prod Sim county executions began 6/22; Case Links enabled and shared with counties as a testing resource.
- CalSAWS requested county POCs from CARES for collaboration; risk remains open for continued monitoring.

Risk 334

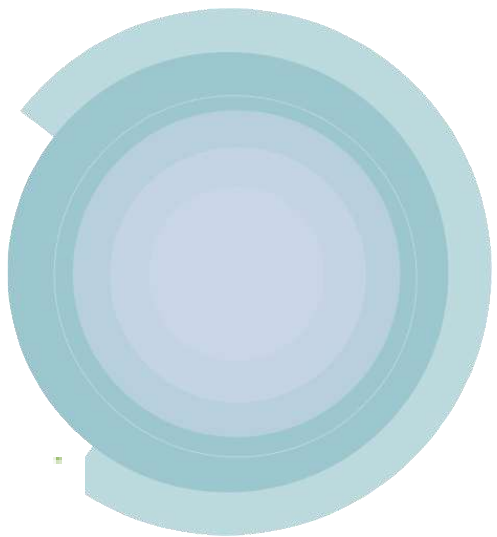
Lack of transmitting foster care vendor information to CalSAWS increases county vendor maintenance

Mitigation Actions: Vendor info communicated via the Placement API in the interim; strategic solution for 57 counties tracked post-v1/post-go-live.

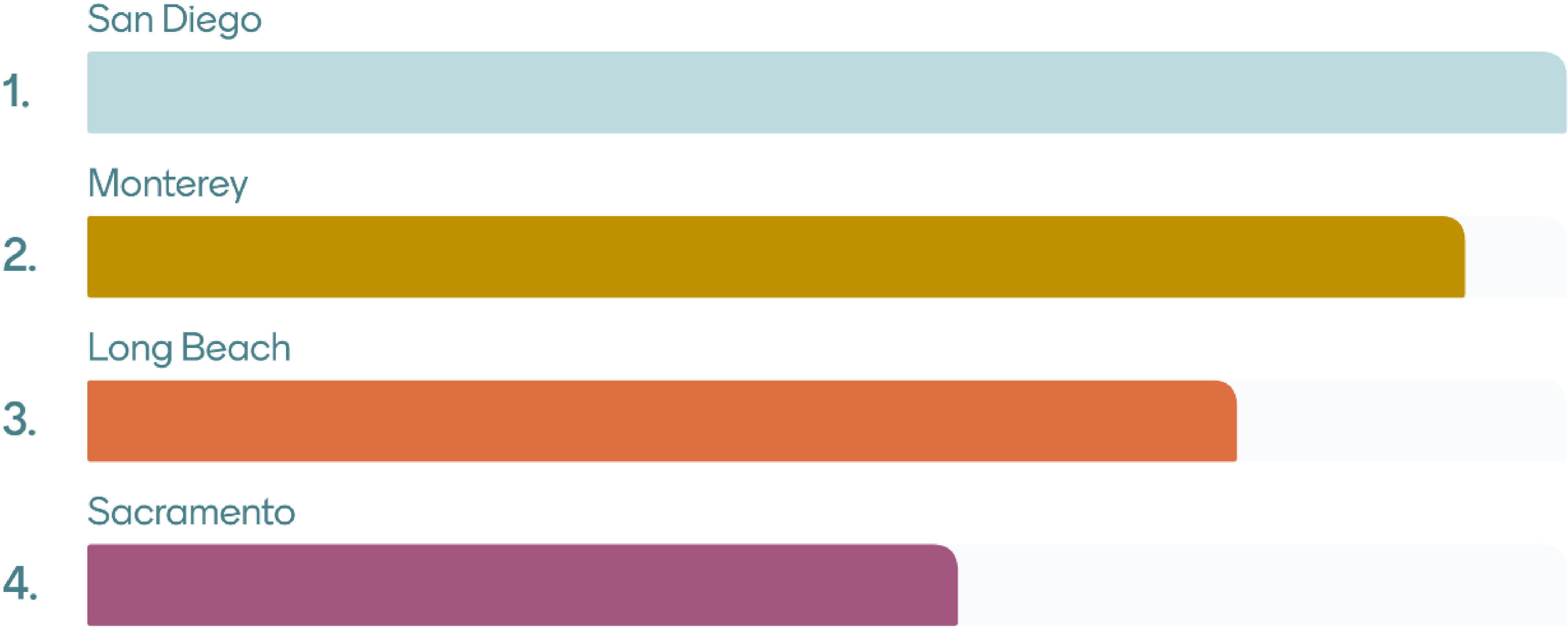
2027 CalSAWS Strategic Meeting Planning Survey Results

2027 CalSAWS Strategic Planning Meeting

Survey Results

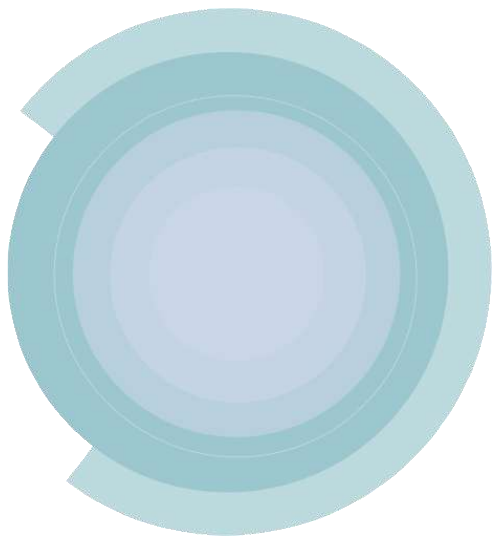


Please rank your preference for which city to hold the Strategic Planning Session.



2027 CalSAWS Strategic Planning Meeting

Survey Results

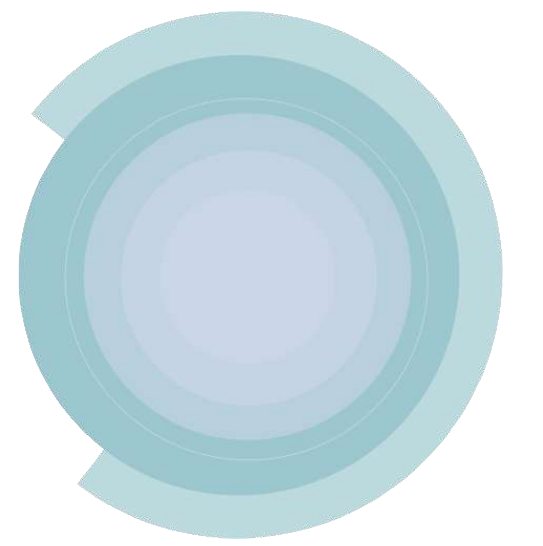


Please rank your preference for which month to hold the Strategic Planning Session.



2027 CalSAWS Strategic Planning Meeting

Feedback



Including a social event would be nice.

For March/April, just be mindful of Spring break weeks where some folks may be unavailable.

Please consider dates at the end of the month to reduce conflict with BoS meetings.

Exciting to see this new chapter and transformation.

I think there should be pre-work done ahead of time so that folks are prepared.

I also believe an unbiased facilitator should be used to manage the process, keep the room focused, and ensure all voices are heard

I also believe the goals should be doable and have built in follow-through to track progress

We need to be strategic on the priority areas. Tangible outcomes resulting from the goals.

Set up activities to help storming and norming of ideas.

Thank you!

State Partners Updates



State Partners Updates

Adjourn Meeting