

# JPA Board of Directors Meeting

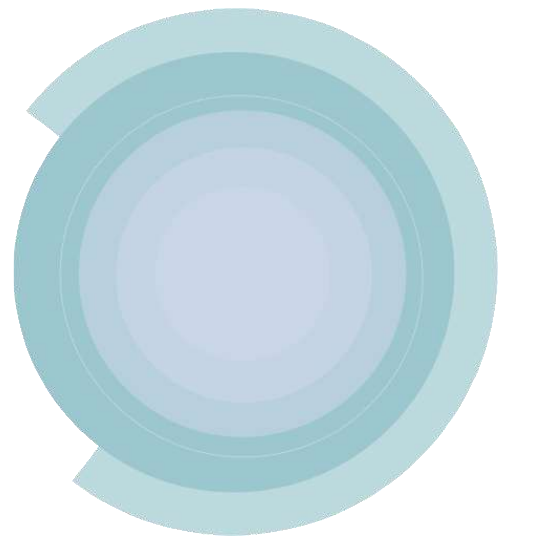
October 9, 2026



CalSAWS



# Agenda

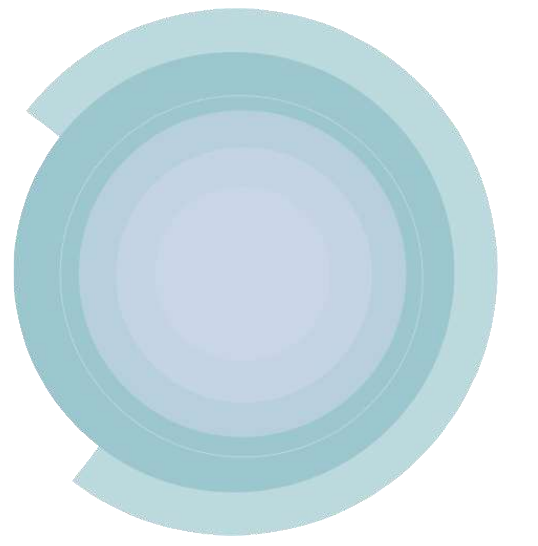


1. Call Meeting to Order.
2. Confirmation of Quorum and Agenda Review.
3. Public Comment: Public opportunity to speak on any item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

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

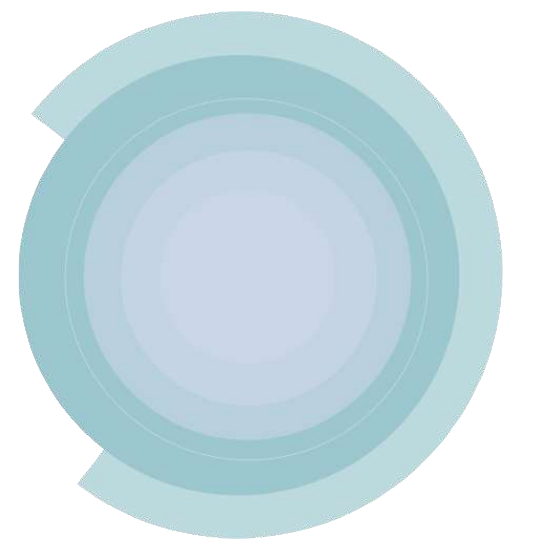


## 4. Approval of Consent Items:

- a. Approval of the Minutes and review of the Action Items from the September 11, 2026, meeting of the JPA Board of Directors.
- b. Approval of CMSP Agreement Amendment 1, which includes the addition of Merced and Placer Counties as CMSP Participating Counties.

# Action Item

## Work Requirement Application System



- The Work Requirement Application System (WRAS) is an application proposed by Los Angeles County Department of Public Social Services (DPSS) to meet federal mandates introduced under H.R.1.
- Its main objective is to manage work registration, monitor activity slots, track compliance hours, and coordinate approved workfare and community service opportunities for customers with active CalFresh, Medi-Cal, and combined programs impacted by H.R.1.
- LA County has volunteered to sponsor initial development and implementation efforts.
- All counties would be able to leverage the solution following Pilot subject to additional funding support via premise and/or county purchases.

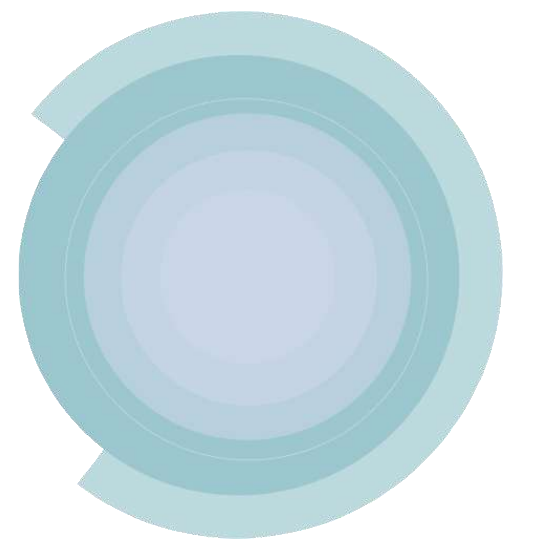
Build One Solution for 58  
Counties

LA County Pilot  
(Target June)

Scale & Configure for  
Additional Counties

# Action Item

## Work Requirement Application System

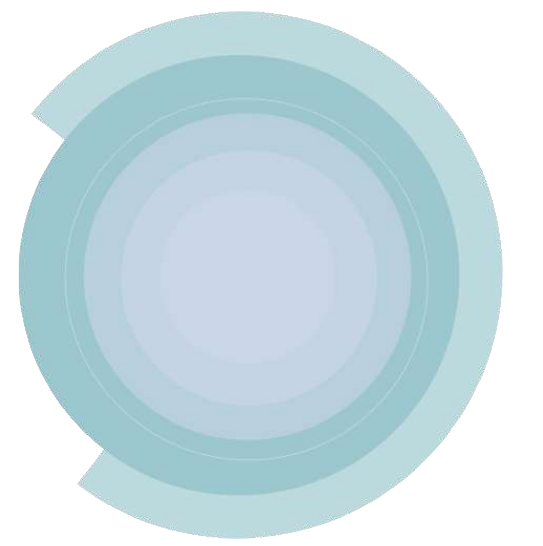


### GOALS

- Provide **customers** with a platform to select their desired community engagement/community service, volunteer, or workfare location to meet their work requirements;
- Provide a means for **county staff** to monitor customers enrolled in their worksite and track completion of participant work requirement hours;
- Allow **providers** to post opportunities, and report hours worked; and
- Automate the **interface** of work requirement hours completed into the CalSAWS system.

# Action Item

## Work Requirement Application System - Impacts



### Benefits

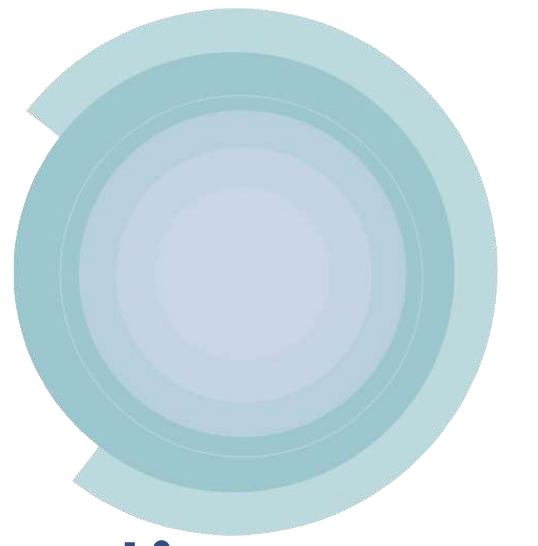
- Minimizes duplicate effort across counties that are considering individual county solutions
- Provides a central solution for counties that may not have ability to support independently
- Utilizes existing assets for efficiencies, increased adoption, and consistent customer experiences
- Improves engagement and more timely access to participation information for both program and customer experience
- Reduces administrative burden and manual efforts associated with tracking participation and verification through external sources
- Allows potential gaps, missing information, and discrepancies to be identified and addressed sooner with earlier visibility into customer activity

### Additional Considerations

- Requires ongoing funding to support maintenance of the API, ongoing help desk support, ongoing regression testing, and recurring AWS resources through either county purchase order(s) or through the OAPDU
- Requires additional resources to support a new initiative on top of currently planned releases
- Expands administrative and security requirements to a new user group, which increases operational complexities

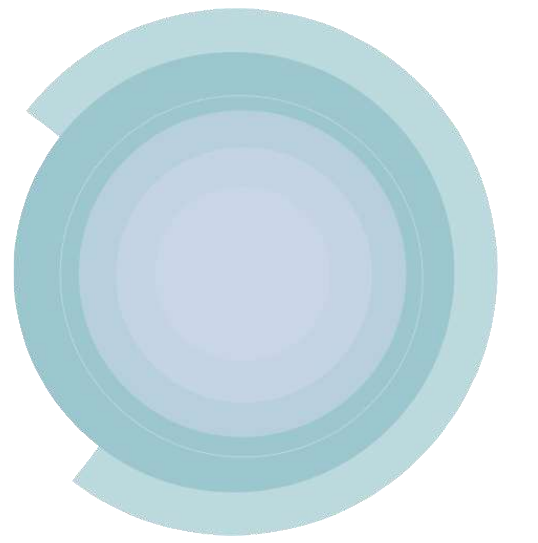
# Action Item

## Next Steps



- Due to long-term impact on ongoing operations and funding needs, the Consortium is requesting Board authorization to move forward
- Based on authorization, CalSAWS will:
  - Coordinate with vendors to establish final timelines and contract documents
  - Coordinate with LA County to finalize a county purchase order
  - Coordinate with State partners on potential premise funding for statewide implementation

# Action Items



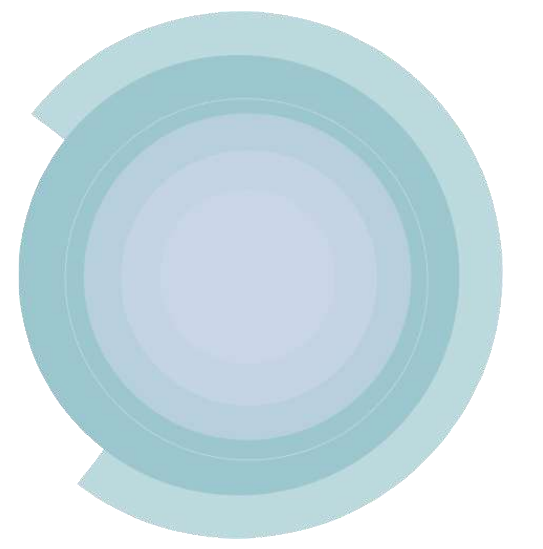
5. Authorize expansion of scope to include design, development, implementation, and maintenance of a work registration portal that meets the needs of all 58 counties.

# Informational Items

# CalSAWS JPA Board Policy Manual Update

# CalSAWS JPA Board Policy Manual Update

Attachments to Board Packet

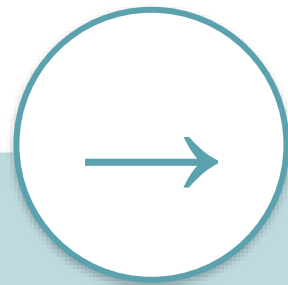
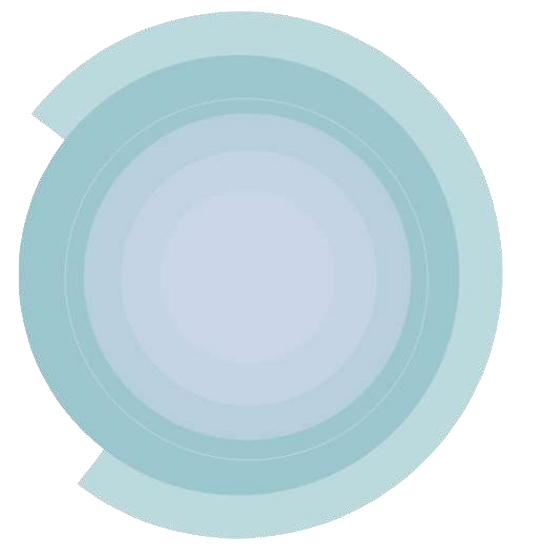


- JPA Board Policy Manual Comment Log
- JPA Board Policy Manual Track Changes Version
- JPA Board Policy Manual Clean Version

# AI DLC Update

# Goals of AI DLC

AI DLC will ultimately serve Counties with faster, higher-quality releases, meeting them where they are



*Speed & Efficiency*

## **Improve Speed to Market**

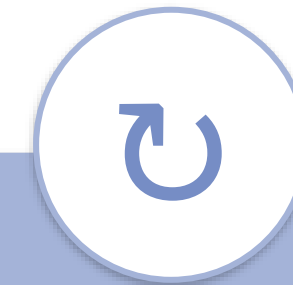
- Changes reach counties faster
- Engineering time shifts from manual busywork to the problems counties raised



*Quality & Testing*

## **Improve Quality and Consistency**

- Fewer errors surface after go-live
- Requirements trace back to what counties asked for,
- Releases are more stable and predictable

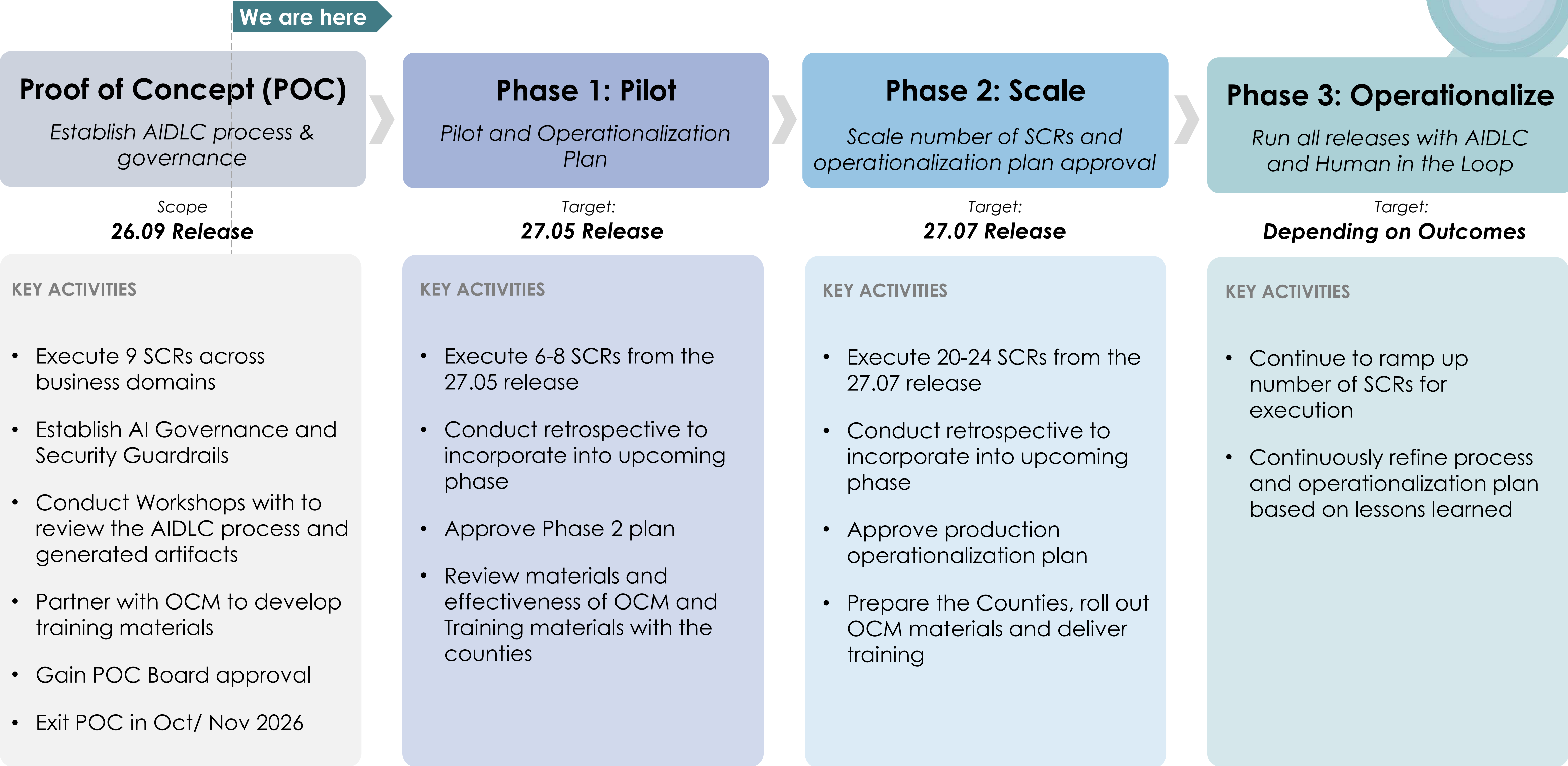
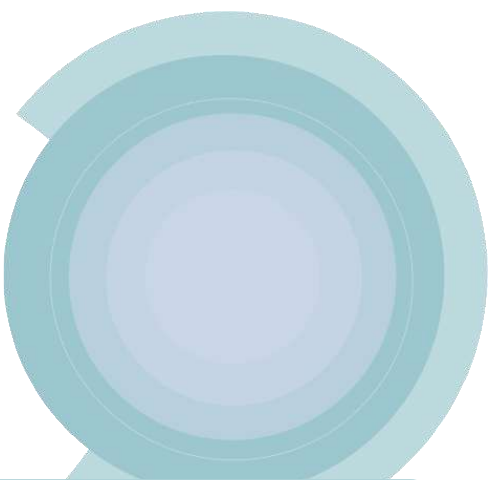


*Change Management*

## **Easier Adoption of New Functionality**

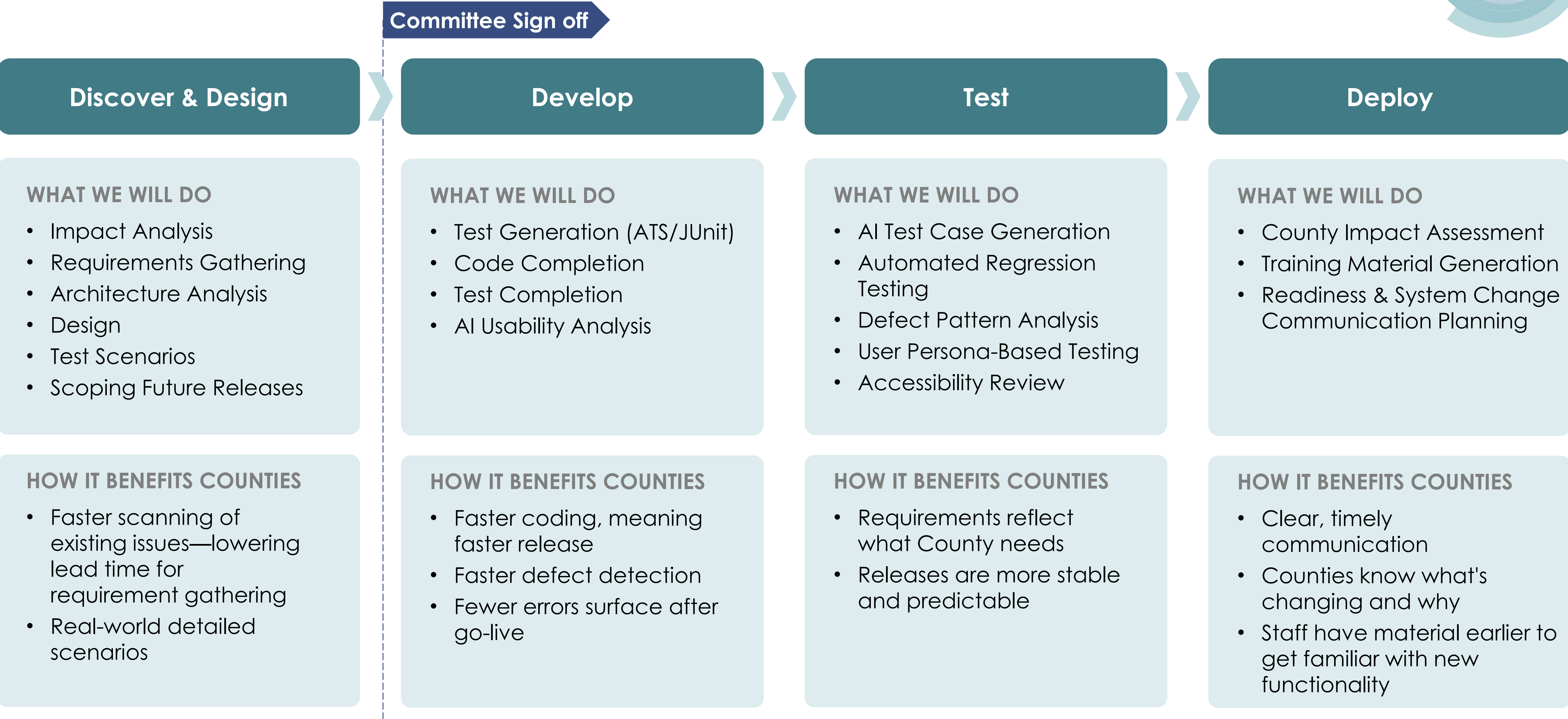
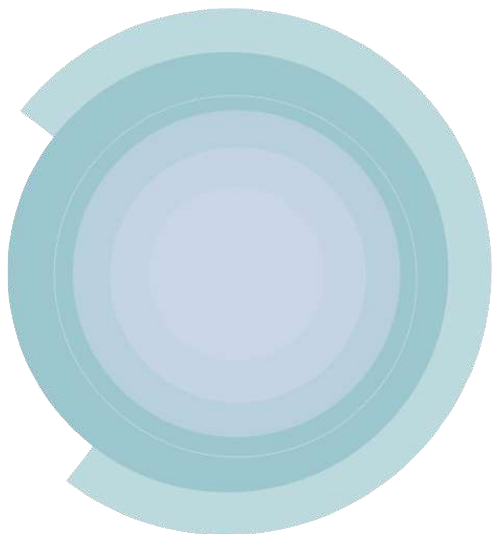
- Counties see what's changing before it lands - not after
- Counties know what's changing and why
- Consistent document standard

# AI DLC Tentative Timeline

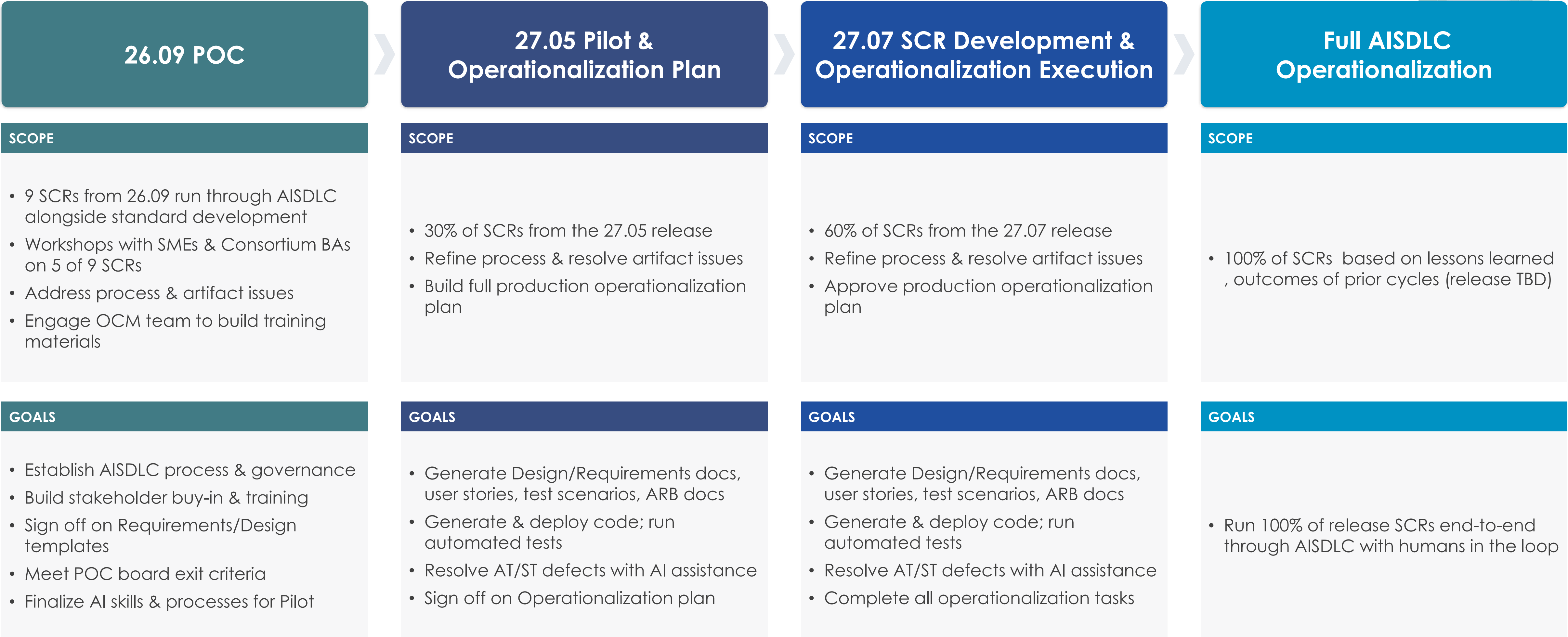
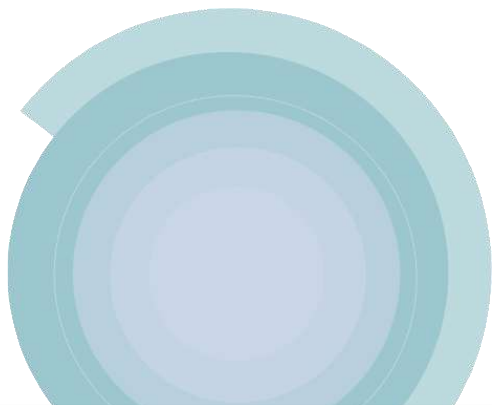


# How Will We Operationalize AI DLC?

Below is the AI DLC approach and process overview



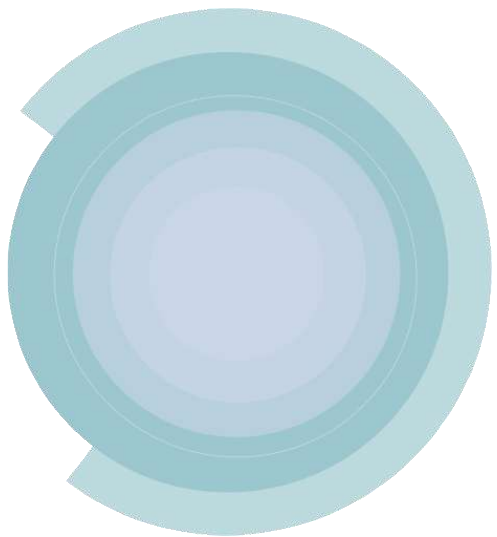
# AI SDLC Roadmap



# Innovation Update

# Grouped Submissions to Distinct Ideas

CRFI 26-035 • Q3 2026 Innovation Theme: Early Checks, Better Outcomes



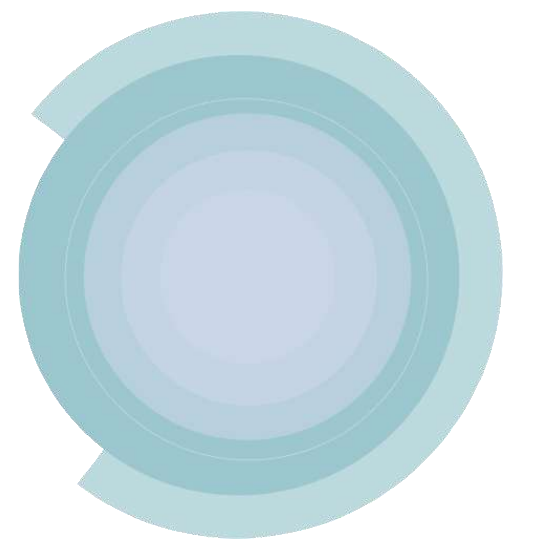
Many respondents proposed the same underlying fix in different words. Overlapping submissions were grouped together, collapsing 37 raw submissions into 20 distinct ideas for review.

## The 20 Ideas, by Theme



# Two Paths Forward

How the 20 distinct ideas move into evaluation



## 13 Innovation Ideas

New concepts without an existing path forward. These move into the Innovation Team's internal review process to identify candidates for a proof of concept.

### EXAMPLES

- Pre-EDBC Hard Stop / Risk Checkpoint
- Journaling & Interview Standardization
- Verification Data / Income Validation

+ 10 more

## 7 Proposed as CER

Routine enhancements to Application. These are handled through the CalSAWS standard Change Enhancement Request process - not new to the Innovation pipeline.

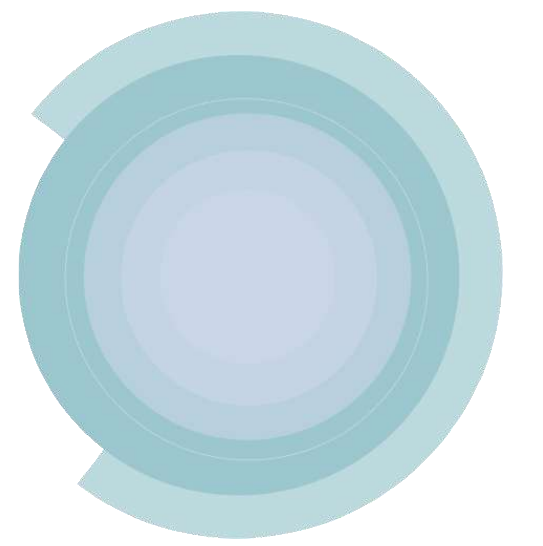
### EXAMPLES

- Shelter-Cost Allocation Update
- NVRA Automation ("It's Time to Vote")

+ 4 more

# What Happens Next

From Panel review to proof of concept



1

## Innovation Panel Reviews

At the next Innovation Panel session, the Panel reviews the 13 innovation ideas and selects which ones move forward to a Proof of Concept (PoC).



2

## Innovation Team Preps the PoC

For each selected idea, the Innovation Team scopes a right-sized PoC and defines how success will be measured.



3

## Results Return to PSC & JPA

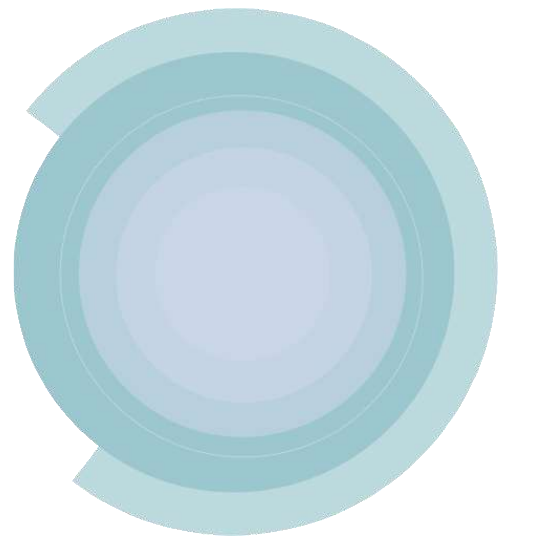
PoC and pilot results are brought back for recommendation and final approval - closing the loop with the Panel and this Board.

*After JPA approval, selected ideas move into CalSAWS's standard Financial, Contract, Release Management, and Change Control processes.*

# Analytics Update

# Analytics Update

## Visualization Tool Challenges

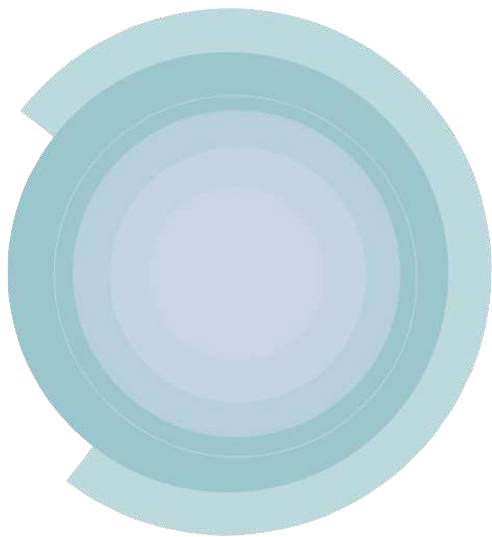


Operational complexities have been identified which prompted reconsideration of the visualization tool to mitigate risk.

- Ability to preserve individual identity for user preferences is limited, e.g. dashboard filters
- Access to the natural-language query functionality is constrained to a limited set of power users within each county
- Data must be copied from AWS to Azure to meet performance requirements
- These challenges necessitate additional operational and security support

# Visualization Tool Decision: Power BI or AI/BI

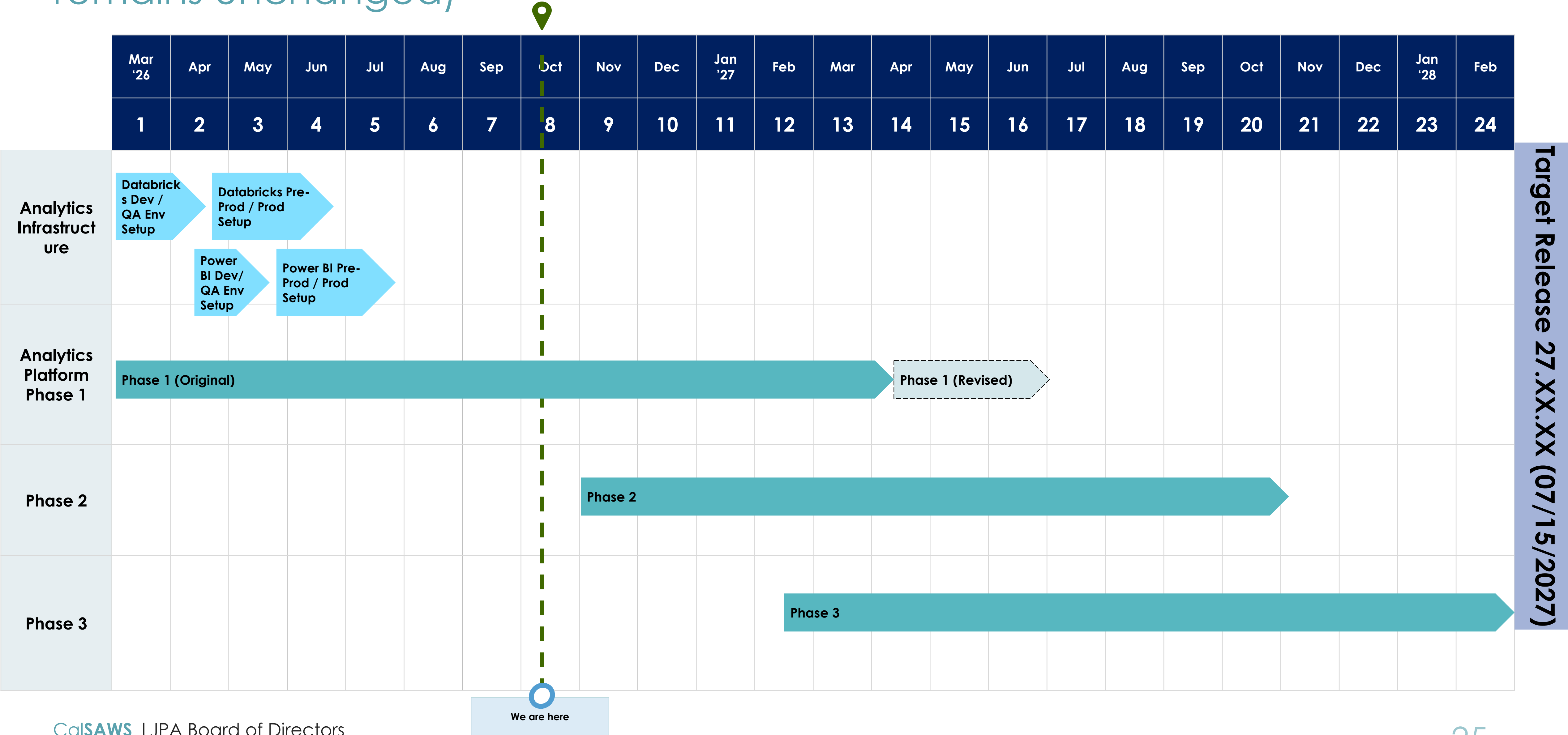
*Power BI meets these requirements, just with more complexity, cost, and less room to grow*



| Decision Criteria                   | Current Path - Power BI                                                           | Revised Option - Databricks AI/BI                                                                                                                                                 |
|-------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Production Track Record             | + Proven industry solution                                                        | - Newer at this scale; shorter track record, offset by proof of concept                                                                                                           |
| Pixel-Perfect Formatting            | + Natively supported                                                              | - Needs to be customized                                                                                                                                                          |
| Impact on the Delivery Schedule     | + None; this is the current path                                                  | - ~10 weeks added for phase 1. No impact to overall schedule                                                                                                                      |
| Natural Language Query Capabilities | - Limited                                                                         | + Natively supported, option to extend beyond limited power users                                                                                                                 |
| What's Needed for Use               | - Desktop software; causes maintenance overhead                                   | + Runs in a browser; nothing to install                                                                                                                                           |
| Security                            | - Multiple security solutions needed                                              | + Single solution                                                                                                                                                                 |
| Where County Data Lives             | - Some data would be in Azure GCC cloud, refreshed on a schedule                  | + Stays in one AWS cloud                                                                                                                                                          |
| Cost/Budget                         | - ~\$2.9M/Year for ongoing services and software with no impact to overall budget | + Additional one-time cost of \$1.68M, with annual savings of ~\$2.9M - no added annual cost (runs on compute already purchased or lower added cost if usage grows significantly) |

**Recommendation:** Databricks AI/BI as the CalSAWS Analytics Platform's visualization layer for simplified architecture to a **single cloud**, with **one security enforcement point** instead of two

# Phase 1,2 & 3 Execution Timeline March 26 – Feb 28 (overall timeline remains unchanged)

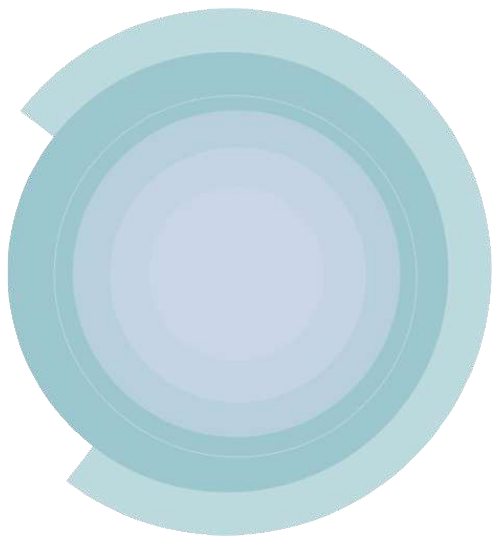


Target Release 27.XX.XX (07/15/2027)

# BenefitsCal Status Update

# BenefitsCal Update

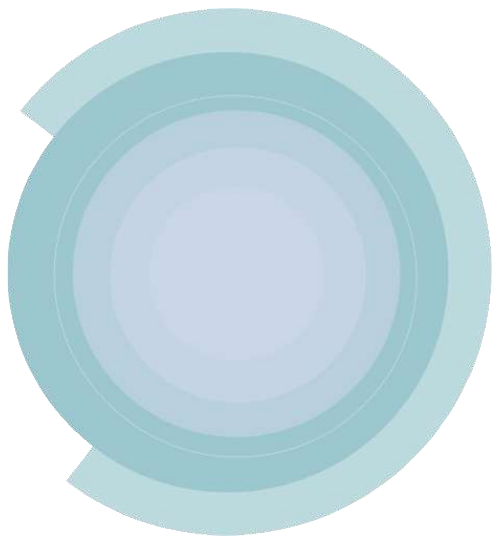
## Priority and Baseline Releases



| September<br>Baseline Release                                                                                                                                                                                                                                                            | November<br>Baseline Release                                                                                                                                                                                                                                                                   | December &<br>January<br>Priority Release                                                                                                                                                                                                                  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>CSPM-80929: Semi-Annual Redeterminations – MAGI New Adult Group. Released, functionality turned off</li><li>CSPM-84131: Update BenefitsCal Dashboard for Case and Program Details for the new MC 216. Released, functionality turned off</li></ul> | <ul style="list-style-type: none"><li>CSPM-80928: Work and Community Engagement Rule for Individuals in MAGI New Adult Group</li><li>CSPM-84764: H.R. 1- Updates to the Mixed Household RE Form</li><li>CSPM-85151: H.R. 1 - Update the Renewal Tracker for MC Person Level Renewals</li></ul> | <p>01/01/2027:</p> <ul style="list-style-type: none"><li>CSPM-84162 Turn on H.R. 1 changes</li></ul> <p>01/10/2027:</p> <ul style="list-style-type: none"><li>CSPM-84459: Migrate from ForgeRock to Okta (Identity and Access Management System)</li></ul> |

# BenefitsCal Update

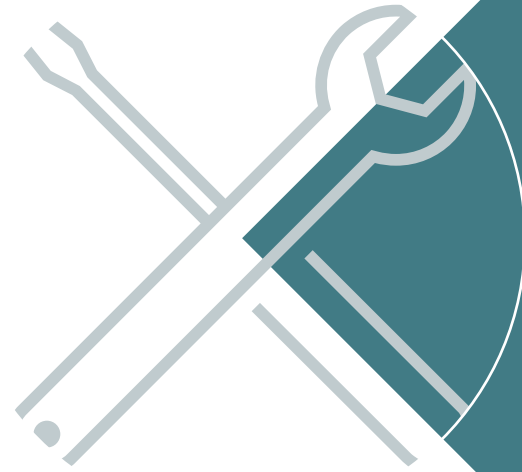
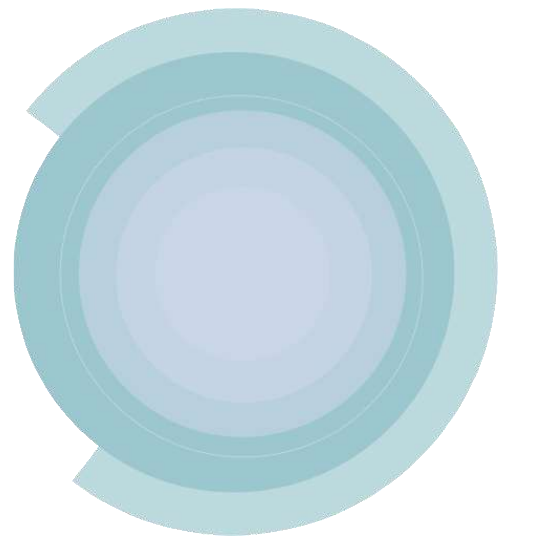
## Priority and Baseline Releases



| January<br>Baseline Release                                                                                              | February<br>Priority Release                                                                                  | March<br>Baseline Release                                                                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>CSPM-83660: Truv Phase 2 – New landing page and integration with CalSAWS</li></ul> | <ul style="list-style-type: none"><li>CSPM-84620: H.R. 1-Work and Community Engagement Rule Phase 2</li></ul> | <ul style="list-style-type: none"><li>CSPM-78624: ROI to CBO in BenefitsCal (ACL 24-91 / ACWDL 24-21)</li><li>CSPM-71672: Collaboration Model: Disability Accommodations</li><li>CSPM-84880: Update the AFB Income Summary Screens to Display Income Break</li></ul> |

# BenefitsCal Update

Truv



Resolved pay stub and pay frequency issues as communicated at the September JPA and PSC meetings, Total Truv Orders submitted to CalSAWS as of 9/29/2026 are 28,135



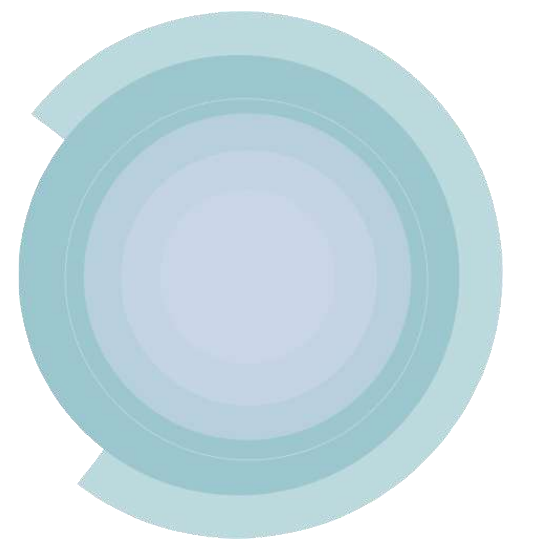
Gathering real world scenarios from Truv Workgroup participants and requesting updates to the test environment data to conduct more realistic testing



Retrospective research and lessons learned completed for Truv Phase 1 (see next slide for details)

# BenefitsCal Update

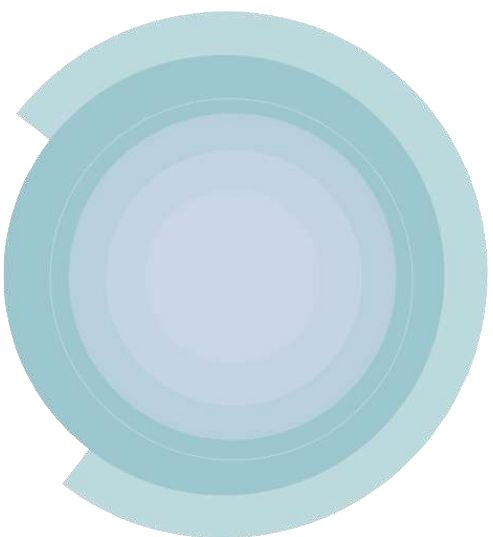
Truv – September 2026 JPA Action item



Conduct a deep-dive review of Truv with county-level experts to identify any gaps or issues not yet reported and ensure a more repeatable process before moving into future phases.

- Received a list of question and tickets to research potential issues identified by LA County – 9/21/2026
- Met with LA County staff to discuss BenefitsCal team research on questions and tickets - 9/24/2026
- Meeting outcomes:
  - Follow up with Truv on the expected outcome of discussion items
  - LA County to submit more tickets if any additional issues are identified
  - Discuss with BenefitsCal workgroup on a possible implementation of a nudge for customers who submit an application after beginning the Truv process one day and return days later to complete

# Revised ROI Phased Implementation Plan



## ROI Policy:

- [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                                 |

## 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: March 2027

## Phase 2

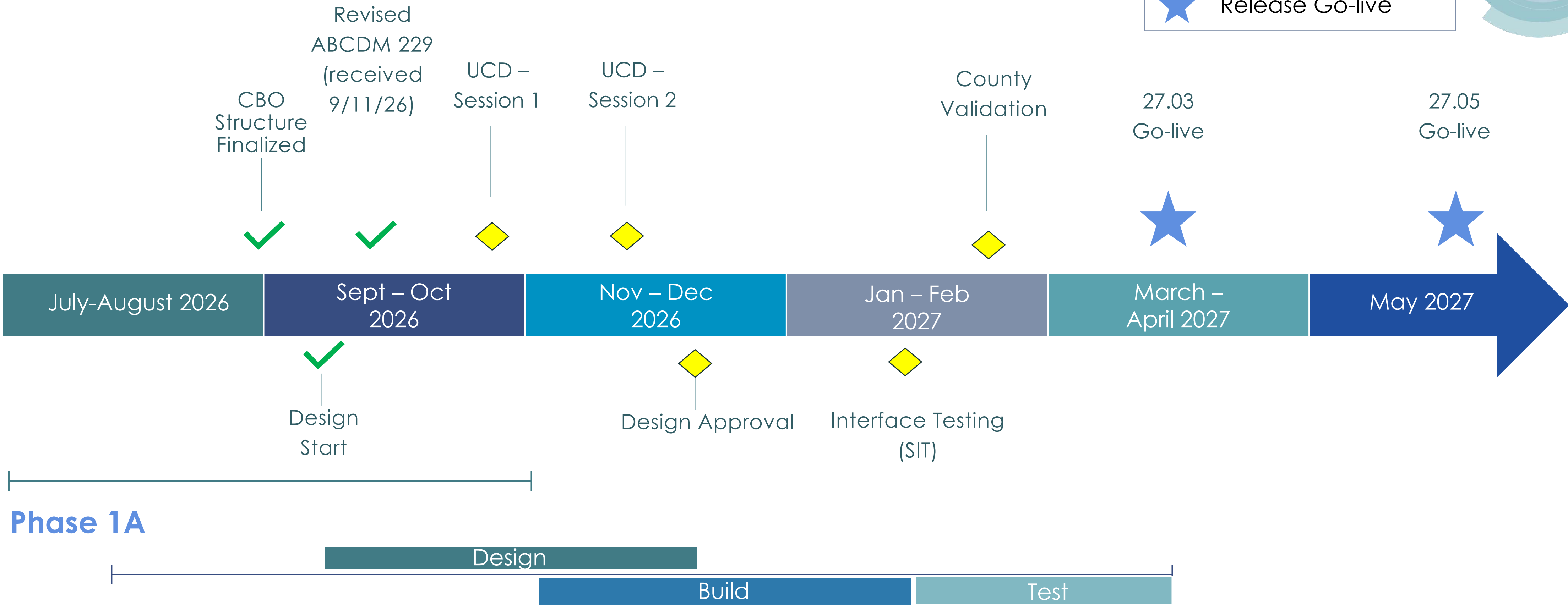
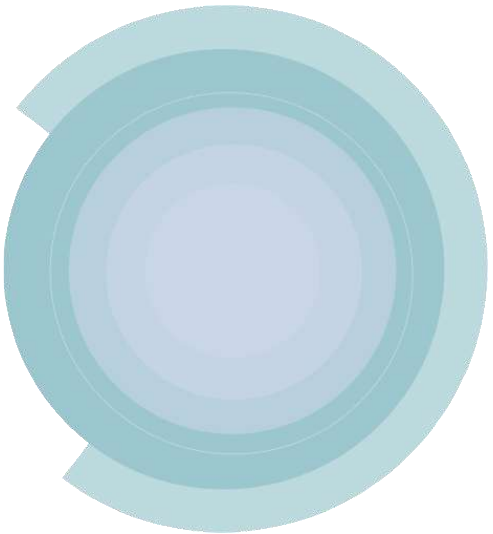
1. Update CalSAWS to capture ABCDM 229 for CBOs that do not have a BenefitsCal Account.★
2. Update CalSAWS to nudge and search for pending ROIs at the time of renewals, re-applications and for ESAP households.+
3. Display termination reasons on CBO and Customer dashboard.+
4. Update CalSAWS to capture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

Target: May 2027

# ROI – Timeline

## Phases and Milestones

| Legend |                 |
|--------|-----------------|
| ✓      | Task Complete   |
| ◆      | Milestone       |
| ★      | Release Go-live |



### Phase 1A

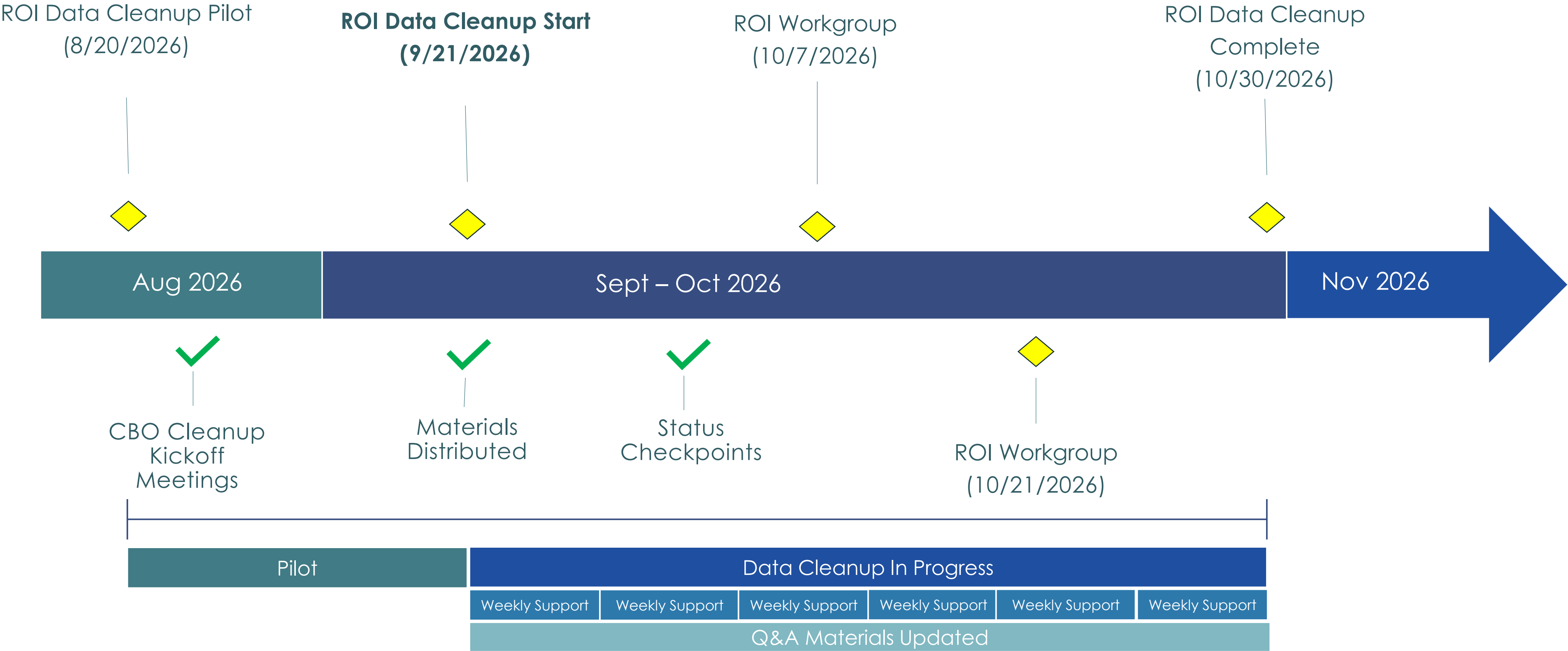
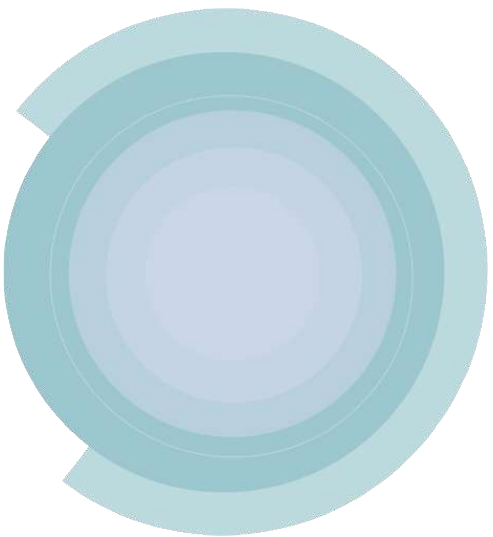
**Phase 1B - Release 27.03:** CalSAWS, BenefitsCal and Okta system changes

**Phase 2 - Release 27.05:** CalSAWS and BenefitsCal system changes

# ROI – Timeline

## CBO Data Cleanup Activities

| Legend |                 |
|--------|-----------------|
| ✓      | Task Complete   |
| ◆      | Milestone       |
| ★      | Release Go-live |



# Release and Policy Update

# Release 26.09 Post Go-Live Snapshot

**09/21/2026**  
Go-Live

**~80K**  
Hours

**83**  
SCRs

**Stable**  
Production

83 SCRs delivered successfully with stable production operations, no active batch issues, and all high-priority issues resolved.

## KEY SCRs DELIVERED

- ❑ **HR1 – Medi-Cal**
  - ❑ Work and Community Engagement Requirements for New Adult Group
  - ❑ Six-Month Redeterminations for MAGI Medi-Cal New Adult Group
- ❑ **HR 1 – CalFresh (ABAWD)**
  - ❑ Update ABAWD and Work Registration Determinations
  - ❑ ABAWD Summary and Additional Journal Entries
- ❑ **Automated Verifications**
  - ❑ Integration of the Work Number - Phase I
  - ❑ Enable PVS Automation Functionality for Pilot Counties

## Production Defects

- ✓ All 7 high-priority production defects resolved
- ✓ 3 defects planned for upcoming releases

## Production Operations

- ✓ No performance degradation post release
- ✓ Batches continue to be on track

## L3 Help Desk Trend

- ✓ Regular help desk volume; no post-release spike observed

## Summary

- ✓ Prior to Release 26.09, workers accessed TWN through a separate portal for income and employment verification.
- ✓ SCR# 296429 integrated TWN into CalSAWS automating data retrieval and reducing manual effort.

## Key Statistics (as of 09/30)\*

Income/Employment received ~26%

Record not found in Equifax ~32%

No current record  
(Record does not exist in the 3-month timeframe) ~39%

Errors(including pending responses) ~3%

\* Equifax confirmed the stats. to be consistent with other State implementations

## Observations

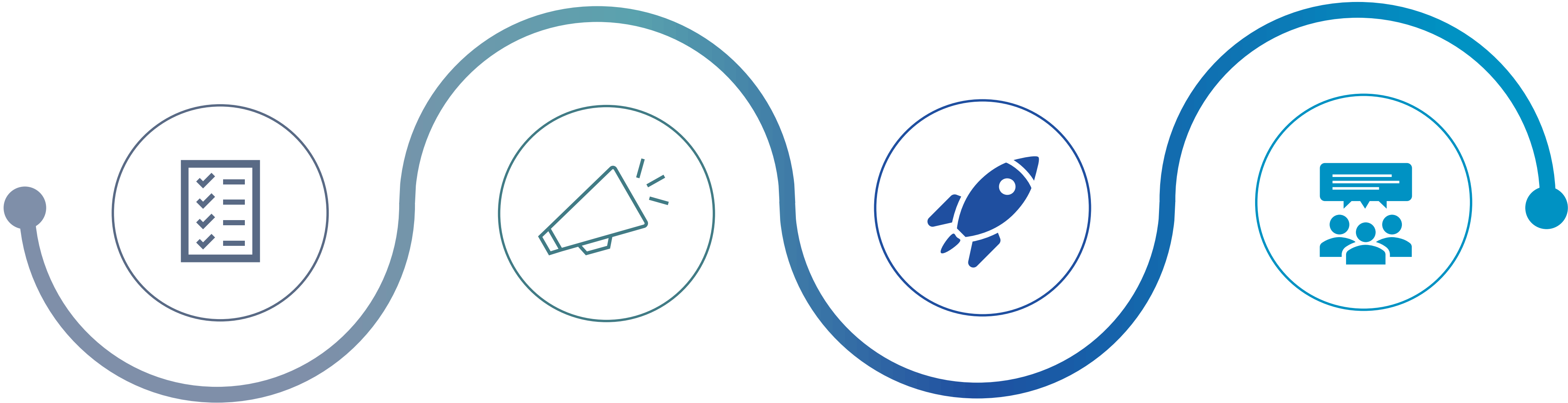
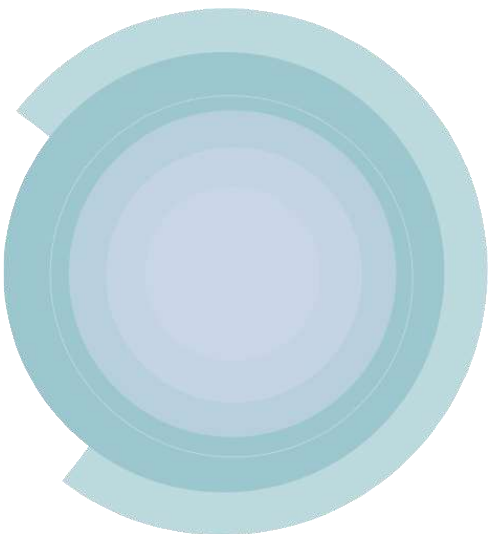
- ✓ CIT-0152-26: Access to TWN portal restricted to IEVS, Special Unit, and QC staff.
- ✓ CIT-0152-26: The request restricts timeframe to three-months. Errors for records beyond the timeframe caused confusion to the county workers.
- ✓ Counties were provided a complex process to gain technical support.

## Next Steps

- ✓ CalSAWS to work with Counties, CDSS and Equifax to differentiate errors messages on the screen to improve clarity for the workers.
- ✓ CalSAWS is working with CDSS to assess and evaluate Work Number portal access for counties
- ✓ Add a change to auto-complete the Equifax help desk ticket and eliminate the need for creating SNOW ticket for every error.

# Release Update

Upcoming Major Release 26.11



## TESTING

System Test, QA, and County Validation are in progress

## RELEASE COMMUNICATION

**Major Upcoming Changes (MUC)**

Draft: 09/25/2026  
Final: 10/30/2026

**Webcast:** 11/03/2026

**Newsletter and Release Notes:** 11/03/2026

## DEPLOYMENT

**Greenlight:** 11/18/2026

**Deployment:** 11/22/2026

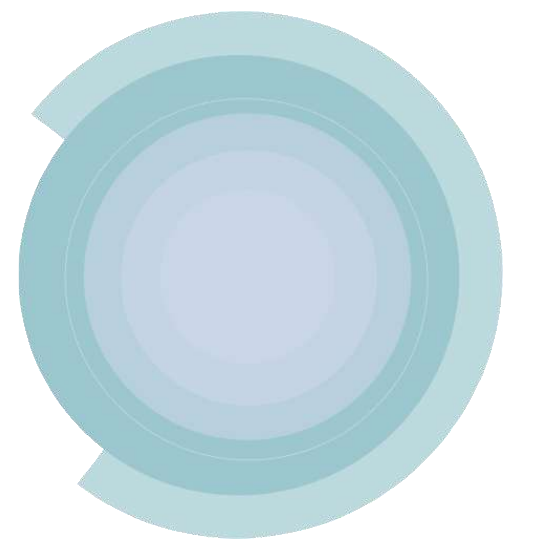
## POST RELEASE

**Post-Release Daily calls:**  
11/23/2026 – 11/25/2026

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

# Release Update

## Upcoming Major Release 26.11 - Release Highlights



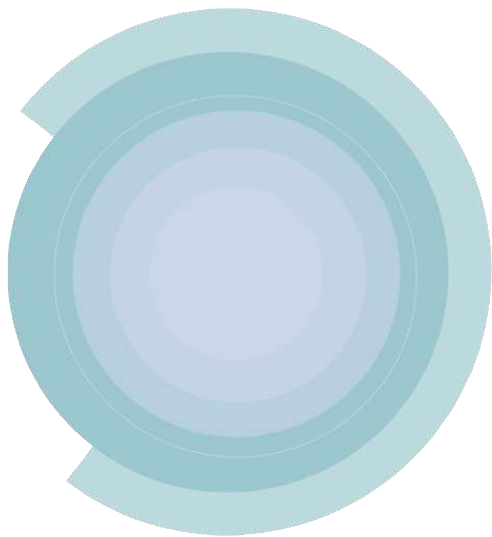
- CA-300677 - CMSP Eligibility Changes
- CA-296573 - CalFresh Processing HR1 Work Group - Targeted nudges and navigation improvements
- CA-274867 - Create new page to display Skipped Issuances
- CA-256864 - Add Threshold Languages for TNB 4 Recertification Packet AND Add Additional Forms to the TNB RE Packet
- CA-280894 - Update the Automated Action for Death Match for CW and CF

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



# Release Update

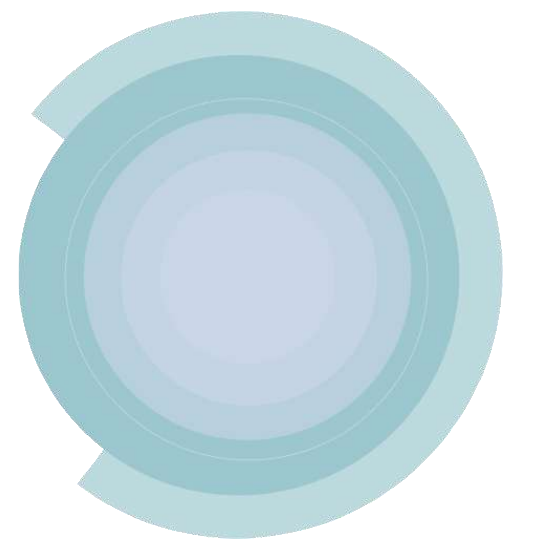
## Additional Upcoming Releases



| October<br>Priority Releases<br>37 SCRs ~6k hrs                                                                                                                                                                                                                                                                                                                                                                                                             | November<br>Priority Releases<br>21 SCRs ~2.7k hrs                                                                                                                                                                                                                                                                                                                                                                                        | December<br>Priority Releases<br>17 SCRs ~13k hrs                                                                                                                                                                                                                                              |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>10/08/2026:</b></p> <ul style="list-style-type: none"><li>County Preview Environment - Configure MC HR 1 functionality to be turned on (CA-302348)</li></ul> <p><b>10/14/2026:</b></p> <ul style="list-style-type: none"><li>The Work Number – Update Age Criteria to 18 years when Batch processing (CA-305160)</li></ul> <p><b>10/29/2026:</b></p> <ul style="list-style-type: none"><li>Revise CW 115 and 115A per ACL 23-91 (CA-272456)</li></ul> | <p><b>11/12/2026:</b></p> <ul style="list-style-type: none"><li>Enhancements to the CF-296 State report (CA-293235)</li></ul> <p><b>11/XX/2026:</b></p> <ul style="list-style-type: none"><li>2027 CAPI COLA Values (CA-290706)</li><li>2027 Social Security COLA Values (CA-301061)</li><li>Update 2027 CalSAWS Batch Calendar (CA-295181)</li><li>2027 MEDS Renewal, Recon Schedule, RE Packets and Release dates (CA-295179)</li></ul> | <p><b>12/XX/2026:</b></p> <ul style="list-style-type: none"><li>2027 CAPI COLA Batch EDBC Run (CA-290707)</li><li>2027 Social Security COLA Batch EDBC Run (CA-301062)</li><li>2027 State Minimum Wage Values (CA-290458)</li><li>2027 State Minimum Wage Batch EDBC Run (CA-290456)</li></ul> |

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

# Medi-Cal Policy Updates



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

- CalSAWS Standalone 26.09 Webcast for WCER and 6 mo REs, Quick Guides and OCM material was held on September 17th
- DHCS Support Calls including DHCS policy, CalSAWS and CalHEERS presentations and demos are ongoing
- Coordinated H.R. 1 OCM Flows including links to DHCS, CalSAWS, CalHEERS, BenefitsCal and CovCA material (CalSAWS Communication Portal)
- County Preview environment will be available to counties with WCER and 6-month RE turned on October 9

## ■ **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

# MC HR 1 and VLP Risks

## Project Watch Items

### Risk 326

- BenefitsCal 26.11 WCER testing in progress.
- Risk trending downward.

### 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.

# FCED Update

# CalSAWS Activity Timeline

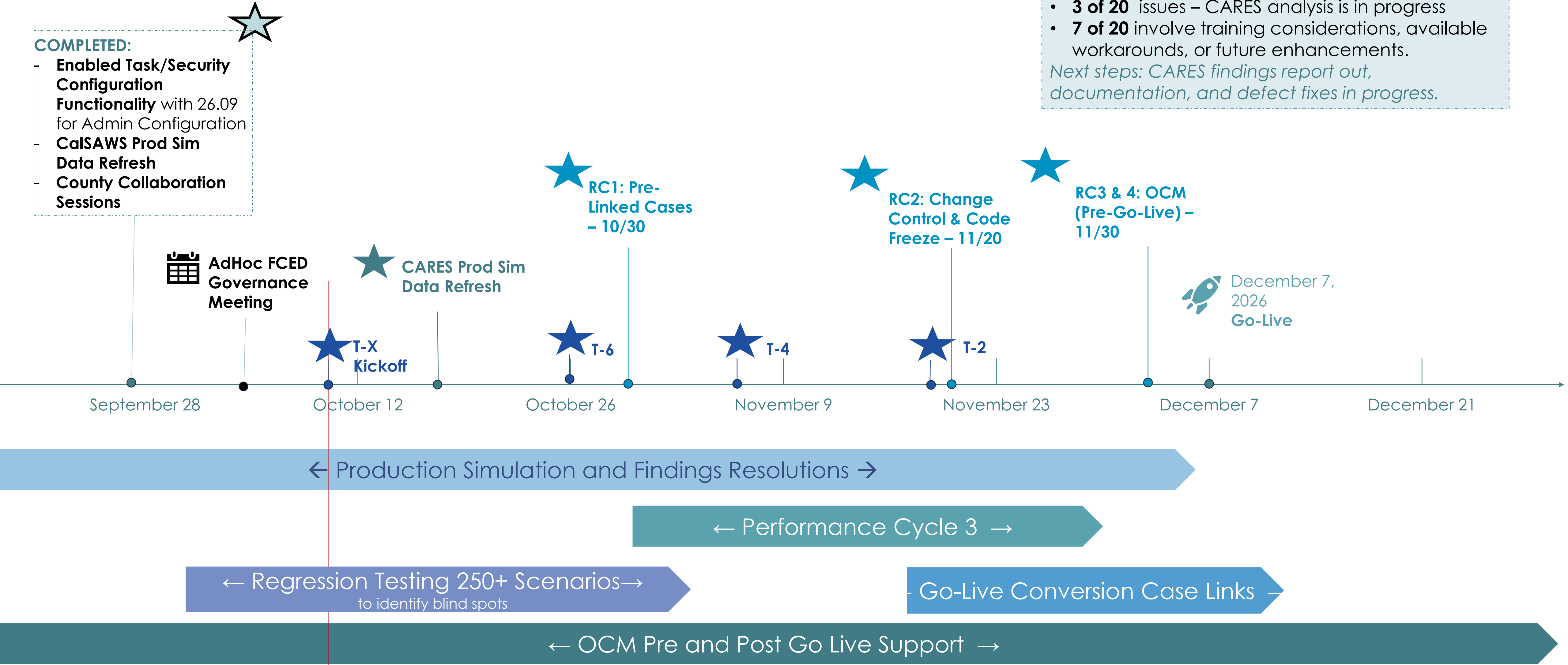
**COMPLETED:**

- Enabled Task/Security Configuration Functionality with 26.09 for Admin Configuration
- CalSAWS Prod Sim Data Refresh
- County Collaboration Sessions

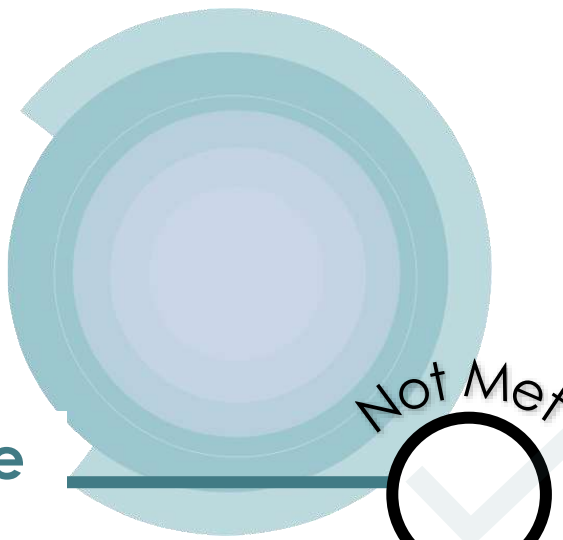
**Report Out: 20 CARES observations across 4 counties:**

- **10 of 20** defects addressed between 10/19 and 10/26
- **3 of 20** issues – CARES analysis is in progress
- **7 of 20** involve training considerations, available workarounds, or future enhancements.

*Next steps: CARES findings report out, documentation, and defect fixes in progress.*



# Key Readiness Criteria Dashboard



RC1: Pre-Linked Cases

Not Met

| Criteria                                                        | Status                                     |
|-----------------------------------------------------------------|--------------------------------------------|
| CARES defect fixes received and re-tested                       | In Progress. <i>Risk is trending down.</i> |
| Handling of residual unmatched records determined               | Complete                                   |
| County instructions documented and shared                       | In Progress                                |
| Go-Live case-link activity timelines and milestones established | Complete                                   |

RC2: Change Control & Code Freeze

Not Met

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

RC3: Performance & Operations

Not Met

| 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 |

RC4:OCM

Not Met

| 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 – trending down

**County Workload** — High impact CRs prioritized. Alternate procedures and county instructions now documented for low impact CRs. Workaround testing is in progress prior to county hand off.

**Placements and Issuances** — CARES actively resolving outstanding defects, cutting bad/delayed data.

**Data Integrity Issues** — Case-link match rates improving, narrowing the unresolved/unlinked gap with actionable county instructions for post go-live handling. (Counties have familiarity with the process with Prod Sim).

# Pre-link Cases, Change Requests & Prod Sim - Readiness



## Conversion Pre-link Case Metrics

**AAP:** 97.7% Case Linked

**Kin-Gap:** 97.7% Case Linked

**Foster Care:** 91.09% Case Linked

**Note:**

- Match rates between CARES and CalSAWS exceeding 95% for all 3 programs
- New links will be established on **10/19** after CARES data refresh



## Functional Change Requests (FCR)

**11 FCRs identified as needed** spanning document/payee policy, AAP placement automation, and rate/address data.

**FCED Governance Update (10/1):**

- **5 of 11** prioritized prior to Go-Live based on operational impact, automation, payment, data integrity, confidentiality, or the absence of a sustainable workaround
- **6 of 11** are recommended for assignment to a subsequent V1.X release after Go-Live because an acceptable interim process or workaround is available.



## Workload impacts - Resolution Plan

**4 Critical Findings, Resolution In Progress:**

- **Foster Care vs. AAP Child's Name:** Incorrect child info on AAP records. (**Resolution complete: 9/11**)
- **Historical APIs for Converted Cases:** Irrelevant historical data increases county workload. (**Resolution ETA: 10/19**)
- **AAP Person ID Confidentiality:** Reusing FC Person ID for AAP creates confidentiality risk. (**Resolution ETA: 10/04**)
- **Resource Name Mismatch:** Appears as new vendor, redundant county setup. (**Report ETA: 10/19**)



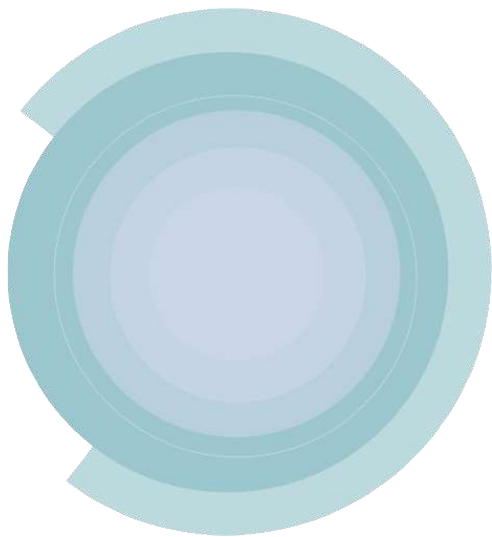
## Vendor Extract Update

*LA's process for sending vendor updates to CalSAWS*

- Critical CARES issues Resolved
- LA county testing is in progress
- 3 non-critical CARES defects fixes in progress. ETA: **10/19**
- Project teams to continue support for county testing and findings resolution

# Production Simulation

| Start Date    | Current Status |
|---------------|----------------|
| June 22, 2026 | In Progress    |



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

## By the Numbers

45

Findings/Observations

(20 CARES, 25 CalSAWS)

7 duplicates

38

Logged Jira Defects

(10 CARES, 28 CalSAWS)

20 Dispositioned

4

Enhancement

(3 CARES, 1 CalSAWS)

25

Defects

(15 CalSAWS, 10 CARES)

5

Functioning as Designed

(5 CalSAWS)

4

In Progress

## Themes

| Theme                                                                                                                                                      | Status                                                                                                                |
|------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| CARES training impacting county partner collaboration                                                                                                      | CARES processing feedback                                                                                             |
| CARES converted cases require populating missing required data before transactions can be sent, this workload activity may impact placement change updates | CARES produced a list of required fields for staff to complete and update to enable successful transaction submission |
| CalSAWS and CARES resource/Vendor Name and placement date mismatches resulting new placement records vs updates to an existing placement                   | CalSAWS completing analysis of impacts and potential county actions with supporting report                            |

## Activities

- ❑ 9/24-9/27 CalSAWS data refresh
- ❑ 10/6-10/17 CARES data refresh, no integration environment
  - ❑ Adhoc CalSAWS Demos
  - ❑ CalSAWS Security and Task County setup
- ❑ CalSAWS Production Simulation Scenario checklist

# FCED OCM Pre-Go-Live and Post Go-Live Activities

FCED OCM activities remain actively underway, with ongoing communications, stakeholder engagements, and system demonstrations. OCM is focused on go-live readiness preparedness.



## Communications

- Upcoming communications will focus on go-live readiness for Counties, such as go-live readiness checklist and go-live resource hub



## System Demonstrations

- Another series of demonstrations will be taking place in October. Invites will be sent to Counties in the coming days



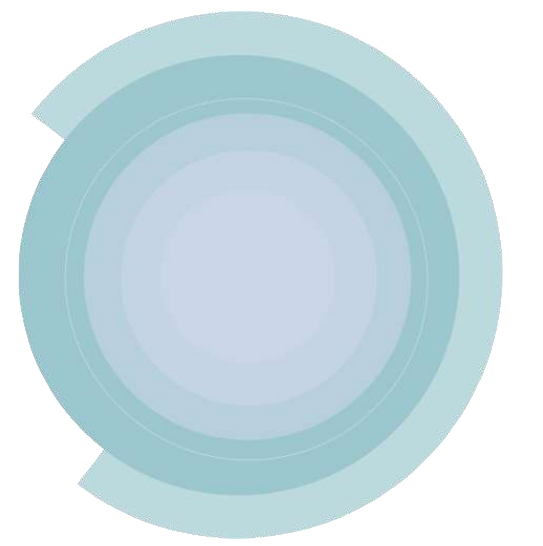
## Resource Materials

- Job Aids
  - WBTs
- Quick Guides
- Online Help Pages

## Support Ahead of and After Go-Live

- Pre-Go-Live Office Hours will be available to support County staff to ask questions, receive guidance, and get support with FCED Security and Task Set-Up activities starting October 1, 2026
- In Planning - Escalation and Mitigation Plans and defined protocols to execute when needed
- In planning - Joint triage, process for developing quick guides on the fly and publishing quickly; process for communicating daily issue log to counties
- Post-Go-Live Office Hours will be occurring daily for 1-2 weeks after go-live
- Hypercare and Issue Resolution to support continued business operations
- Staff will have the opportunity to ask functionality questions, request OCM support, and more.

# 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.

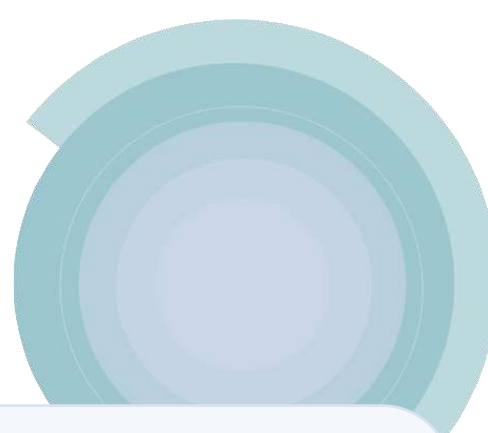
## Risk 334

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.

# PVS Automation Effort

# PVS Retrospective



- The PVS abstract identifies recipients and eligible individuals for Title II (RSDI), State Unemployment Benefits(UIB), and Disability Insurance Benefits(DIB).
- The automation objective is to reduce the CalFresh error rate by automating abstract processing, updating income data, triggering eligibility redeterminations and dispositioning the abstracts.

## Challenges

-  **Standardizing the County Process**
  - Some Counties and workers follow different manual business processes, which results in variations in how the functionality is used and tested.
-  **Data restriction**
  - Current process limits County validation testers to masked data only.
-  **Testing Complexity**
  - Ensuring testing expectations and processes are clearly understood
  - Some new testers were expecting enhancements beyond the approved design.
-  **Late KPI Definition**
  - KPIs and Metrics were being defined during Test phase.

## What Worked

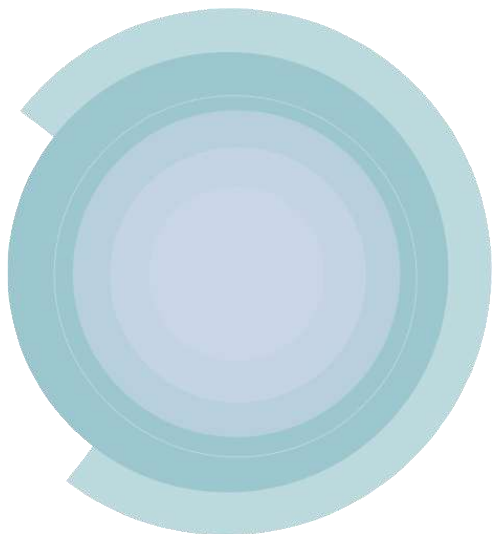
-  **PVS Configurability**
  - 26.03 automation disabled immediately through system build in configuration.
  - Focus on fix and pilot activities
  - Rapid containment - Reversed duplicate income, benefits restored and disseminated appropriate communication to counties.
-  **Real-World Test Scenarios**
  - Testing was conducted using masked production-like abstracts, which allowed testers to see how the system would respond using real-world scenarios.
-  **Strong Collaboration**
  - Focused collaboration with Consortium, QA & County Validation testers to validate the IVES automation.
  - Recurring touch points held to discuss, address, and resolve concerns.

## Improvement Areas

-  **Co design**
  - Complex SCRs like IEVS require IEVS worker feedback/input earlier during design.
-  **Unmasked Test environment**
  - Plan approvals to validate in unmasked environments for large processing changes that require real-world scenario data testing.
-  **Enhance Communications**
  - Early walkthrough, access to test scripts and materials and align on expected outcomes for test phases
  - Continued discussions on future PVS automation enhancement
-  **KPI Definition**
  - Early KPI definition and monitoring through SDLC and post-production.
-  **Piloting large scale change**
  - Pilot changes across a small number of counties for large scale/impactful SCRs.
-  **Post Go-Live Support**
  - Post release “office hours” to address concerns and faster defect resolution.

# County Visits Report Out

# Where We've Been So Far...



We visited the following counties to-date and have additional visits planned in the coming weeks

61.3%

TOTAL CASE LOAD COVERED

09

COUNTIES

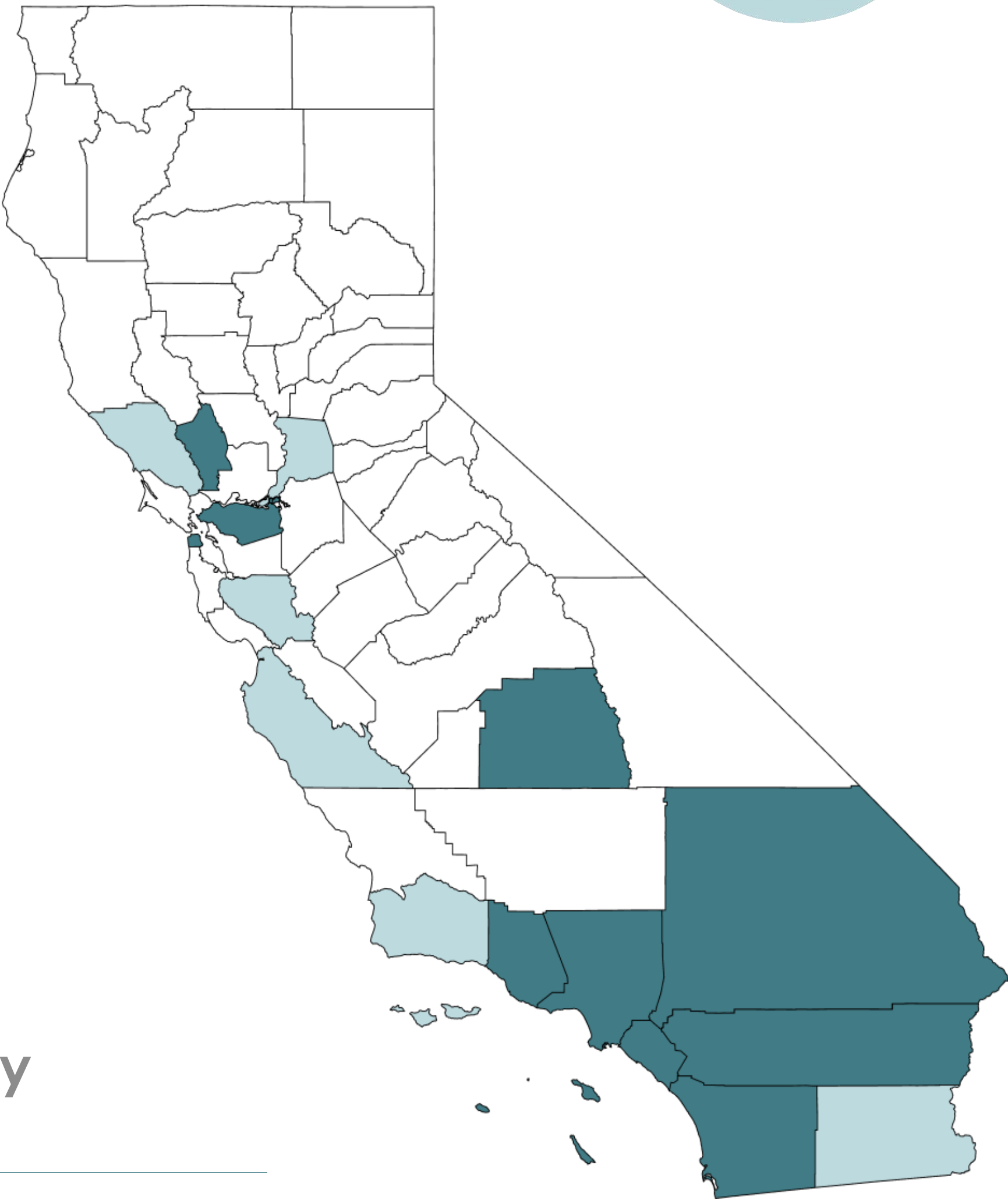
## Counties Visited

- San Bernardino
- Ventura
- San Francisco
- Contra Costa
- Napa
- Riverside
- Orange
- San Diego
- Los Angeles

## Upcoming Visits

- Santa Clara
- Santa Barbara
- Sonoma
- Monterey\*
- Imperial\*
- Sacramento\*

Additional counties to follow as availability permits.



\* Outreach began, visit to be scheduled based on County availability

# Who We Engaged So Far...

155

## COUNTY LEADERSHIP

*Directors and Managers, oversee staff performance and county operations*

### ROLES PRESENT

- Deputy Director
- Operations Manager
- Principal Analyst
- County SAWS Team
- Program Manager
- Regional Manager

110

## SUPERVISOR

*Workers responsible for overseeing eligibility workers*

### AREAS COVERED

- Case Review
- Analytics
- Program Specific Review for Eligibility, Redetermination, Renewals, etc.

72

## ELIGIBILITY WORKER

*Workers responsible for case processing and management*

### AREAS COVERED

- CalFresh, Medi-Cal, CalWORKs, GA/GR Eligibility Determination
- Eligibility Renewals
- Program Specific Intake
- Program Specific Processing

12

## CLERICAL WORKER

*Workers who are the first touchpoint when an application is received*

### AREAS COVERED

- Reception
- Inbound Call Center
- Application Registration

## SAMPLE SESSION OUTLINE

- **Leadership meeting** w/ Program Managers and Deputy Directors
- **Focus Group** w/ Supervisors
- **Observations** w/ In-Person Frontline Staff
- **Debrief** w/ Deputy Directors and Program Managers

# What We Heard, Across Counties

While counties differ in case volume and organization model, these issue areas remain consistently top of mind for County Leadership and staff.



## TASK MANAGEMENT & WORKLOAD REPORTS



**Tasks are too rigid to reflect real county workflows, lack prioritization, bundling rules, and need manual intervention for assignment**

*“Tasks are County configured, but we need them to work flexibly for each unit..”*

## USABILITY & NAVIGATION



**Excessive clicks, layered menus, and manual data entry slows down workers**

*“The conversations we keep having is timeliness. Are they clicking 10 screens now when it used to be one click?”*

## CALFRESH ERROR RATE



**Shelter and income entries are primary drivers of payment error rates and case reviews happen manually outside of the system**

*“If we rely on workers to remember to check everything, you decrease the likelihood [of catching errors].”*

## JOURNAL ENTRIES



**Writing and searching through journals is time consuming and journal quality is worker driven**

*“It can feel like double the work — fill the template outside of CalSAWS, then copy-pasted back in. “*

## CUSTOMER CORRESPONDENCE

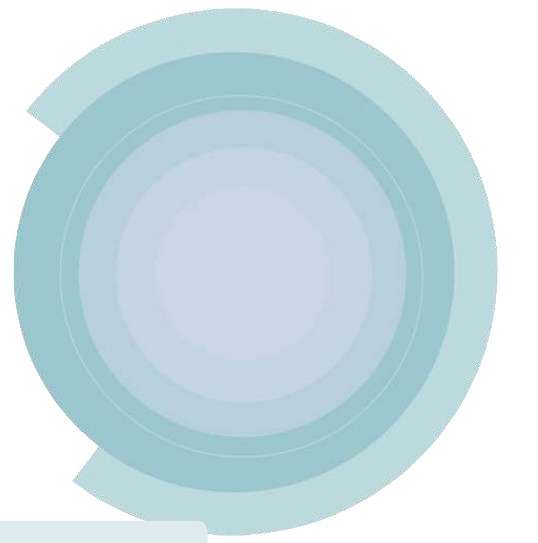


**Manual NOA generation slows customer communication and increase customer call backs**

*“We need to use manual EDBC, which means rules for NOAs are disrupted. Then they need to make a notice from scratch.”*

# What We Heard, Across Counties

These were additional issues areas that came up in discussions with County Leadership, Supervisors, and staff.



## CASE HISTORY & EVENT LOGGING



**Rebuilding case history is manual and time consuming**

*"There needs to be an overall capture of history... what action happened... who completed it... who generated the NOA.."*

## CASE REVIEW & AUDIT



**Manual case reviews are managed outside the System, with information scattered across multiple areas**

*"Right now, you have to individually click through each page when reviewing a case."*

## CHANGE MANAGEMENT



**Early system-change communications for major enhancements would better support staff adoption of new functionality**

*"We are building the plane in the air because we don't know when the change is coming or what it is."*

## MULTI-LANGUAGE SUPPORT



**Limited language options available for areas such as reception log and automated text creates the need for workarounds**

*"If we had that extra language support, then we could connect them to an eligibility worker right off the bat."*

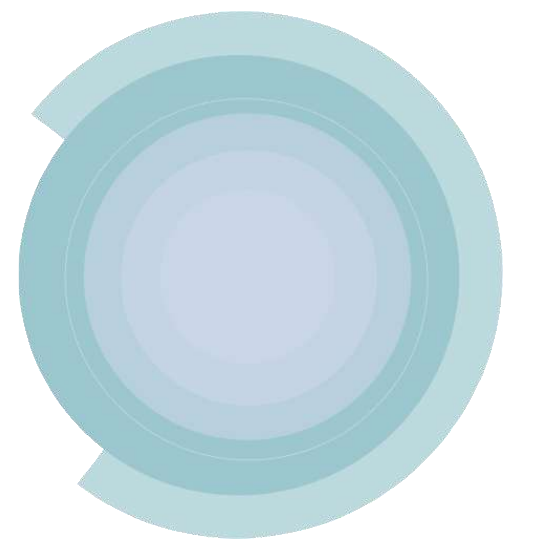
## COMMUNITY ENGAGEMENT



**CalSAWS does not provide the functionality to help applicants across CalFresh & Medi-Cal comply with work requirements**

*"We need easy way to support job search, track hours, and verify status within CalSAWS. "*

# Where We Go From Here...



## NEXT

### **Complete County Visits**

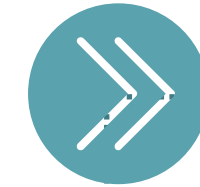
Expanding from 60% to full statewide coverage — across regions, size, and case volume

### **Turn County Input Into Action**

Map CER submissions into county input categories for PSC prioritization

### **Refine Design Practices**

So future releases incrementally alleviate pain points counties raised



## LATER

### **Prioritize the Right Technology**

Sequence application and architecture evolution to match the pain points counties raised

### **Develop Draft Roadmap**

Present proposed roadmap of holistic solutions to PSC/JPA as part of annual strategic planning activities

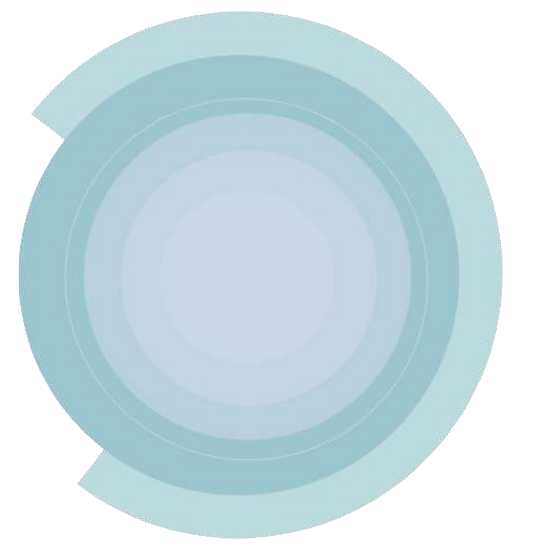
# Infrastructure and Contact Center Update



# Infrastructure Projects

# Infrastructure Projects

## Oracle Databases@AWS Results



### EDR/AdHoc

- Significant improvement in County processing times up to 50%:
  - “So far we’ve noticed a substantial performance boost. Our daily load time decreased from ~5 hours to ~2 hours.”
  - “We are happy to report that our ELT processes are performing great. We have seen up to 40% improvement in our runtimes which is greatly appreciated by our data team.”

### Operations

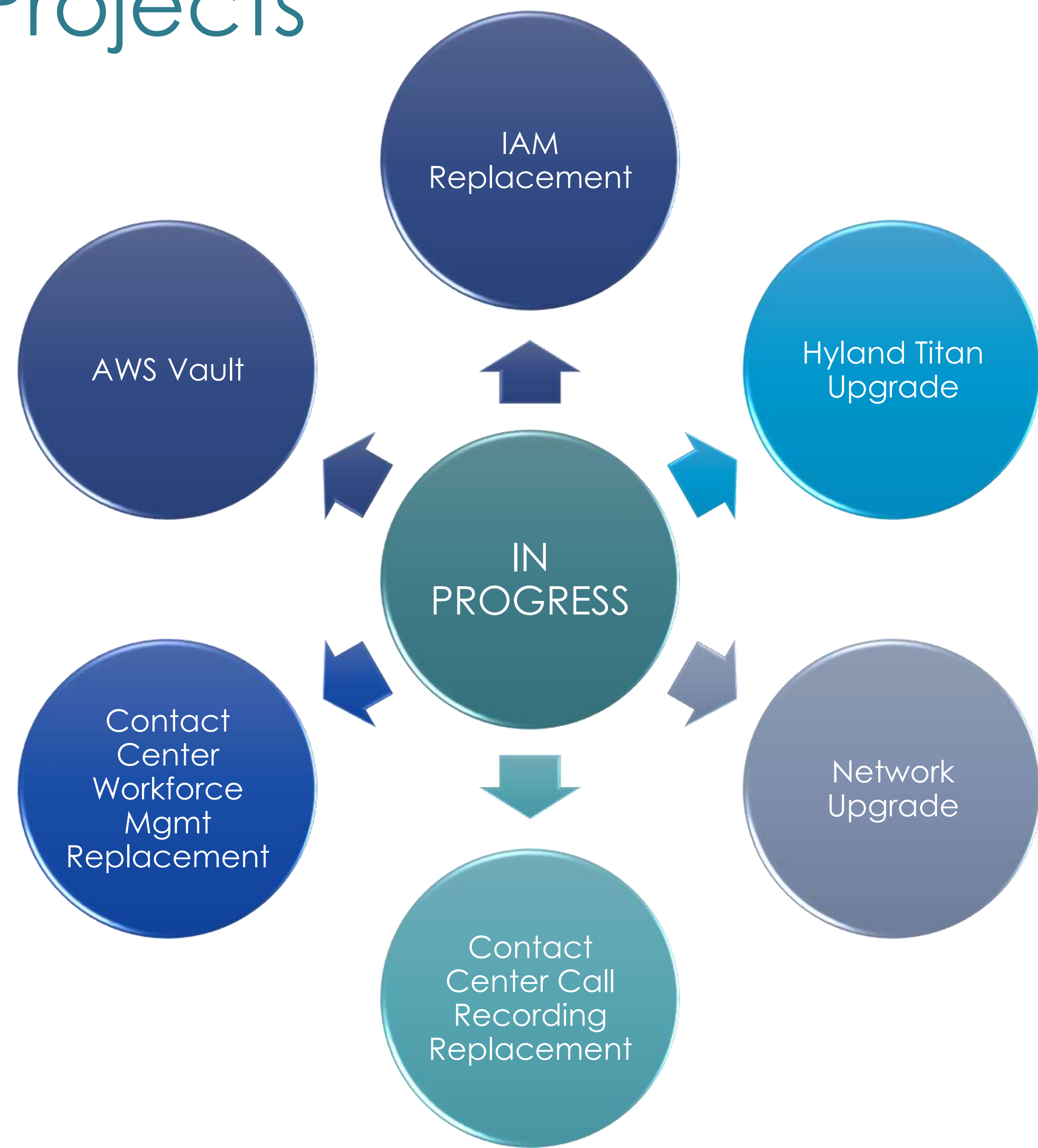
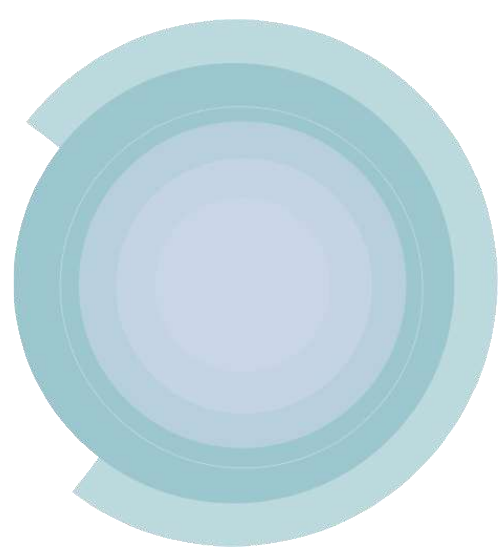
- Created additional capacity which can be accessed immediately
- Reduced batch processing time
- Reduced time to create masked databases
- Successfully performed disaster recovery test

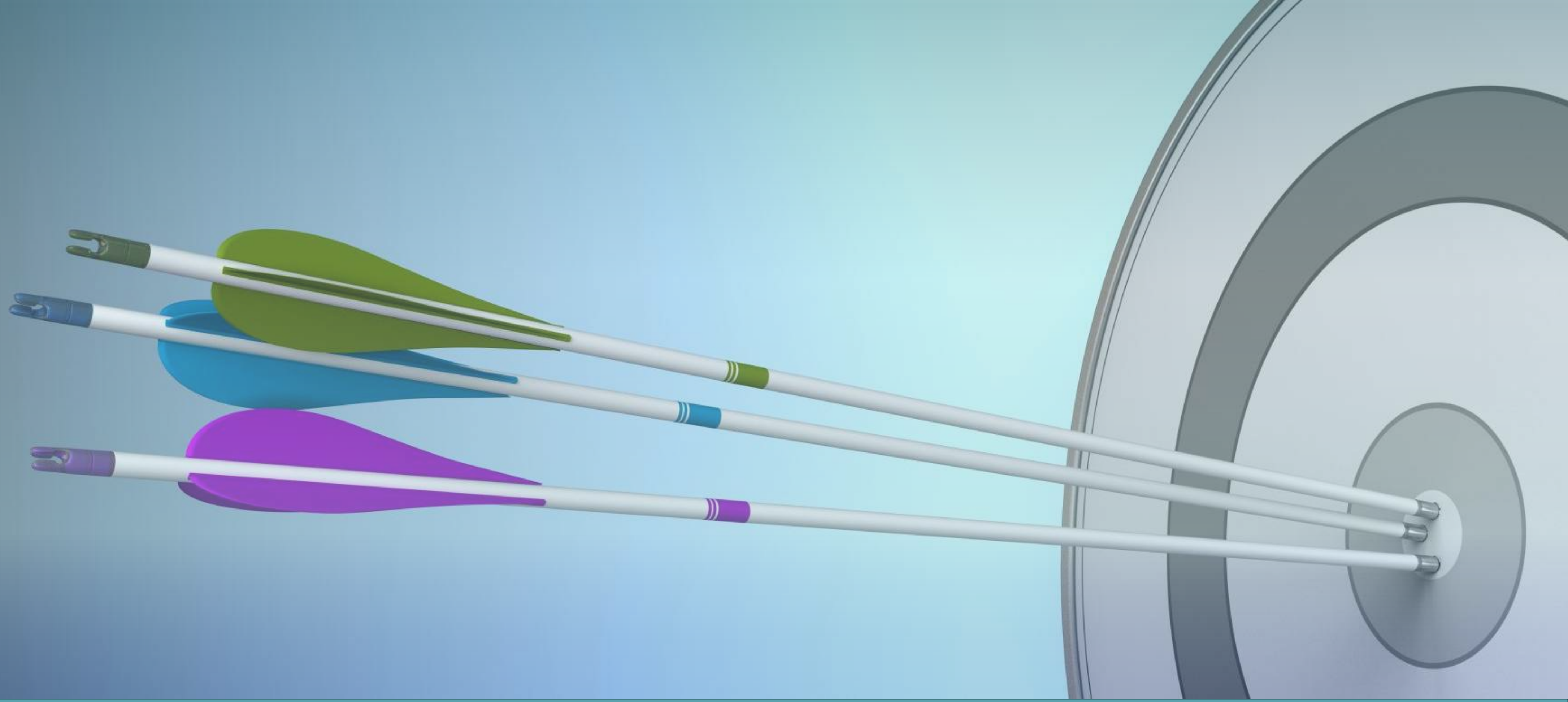
### Online

- Decreased transactional processing time for most transactions
- No improvement in EDBC timing

# Infrastructure Projects

Large Projects in Progress

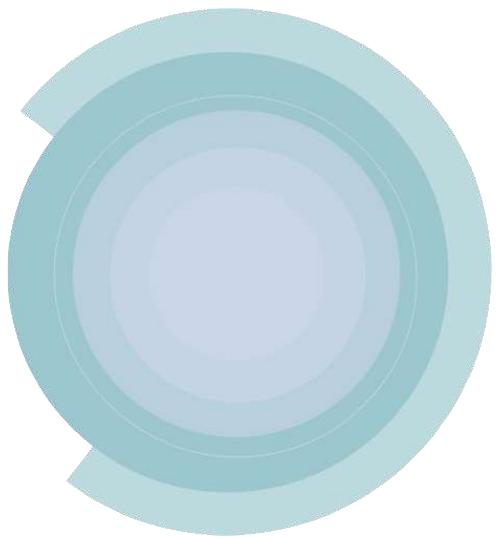




# Call Summarization

# Contact Center – Call Summarization

Group 1 and 2 Counties



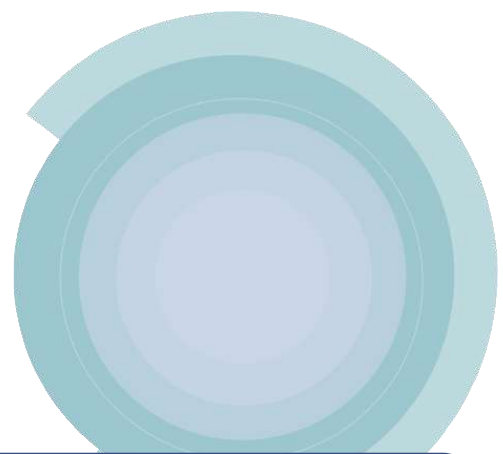
| Group 1<br>(Complete)                                                                                                                                                                                                                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Contra Costa</li><li>• Orange</li><li>• Marin</li><li>• San Mateo</li><li>• Monterey</li><li>• Santa Clara</li><li>• Santa Cruz</li><li>• Sacramento</li><li>• San Francisco</li><li>• Solano</li></ul> |

| Group 2<br>(In Progress)                                                                                                                                                                                                                                                |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Fresno</li><li>• Stanislaus</li><li>• Kern</li><li>• Kings</li><li>• San Bernardino</li><br/><li>• Up Next<ul style="list-style-type: none"><li>• San Luis Obispo</li><li>• Santa Barbara</li><li>• Ventura</li></ul></li></ul> |

- Group 3 completes in November 2026
- Group 4 completes in February 2027

# Metrics Since Launch

Results from April 10th to Sept 18<sup>th</sup> – 12 Counties in the Metrics – 15 Counties Live



## Key Performance Metrics

Since Launch  
4/10/26 Forward

345,879

Summaries Generated Since Launch

4

Avg Generation Time (Seconds)

100%

% Generated within 60 seconds

## Percentage Time Reduction

8%

Reduction in ACW

13%

Reduction in AHT

## Percentage of Content Unedited

84.21%

Call Summary Content Unedited

## Observations/Notes

After Call Work (ACW) and Average Handle Time (AHT) are expected to fluctuate widely as new Counties implement the functionality.

# 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

# Adjourn Meeting