

Project Steering Committee Meeting

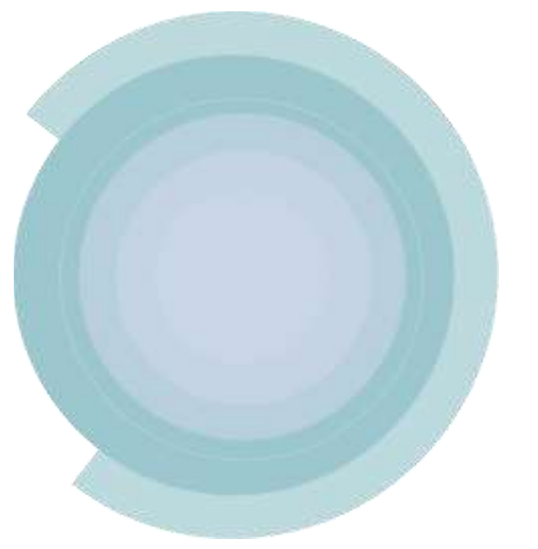
October 8, 2026



CalSAWS



Agenda

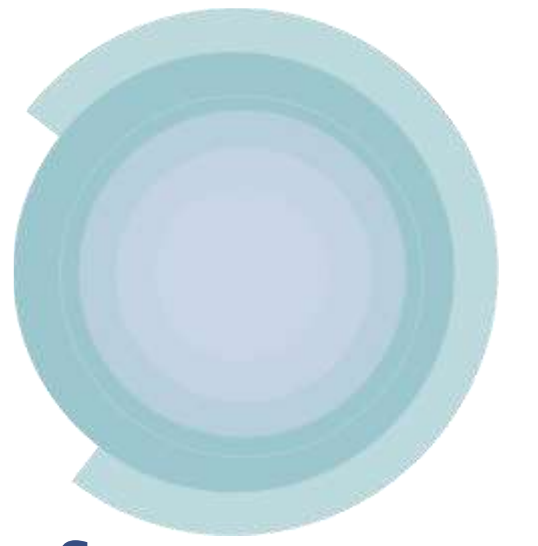


1. Call Meeting to Order.
2. Confirmation of Quorum and Agenda Review.
3. Public Comment: Public opportunity to speak on any item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

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



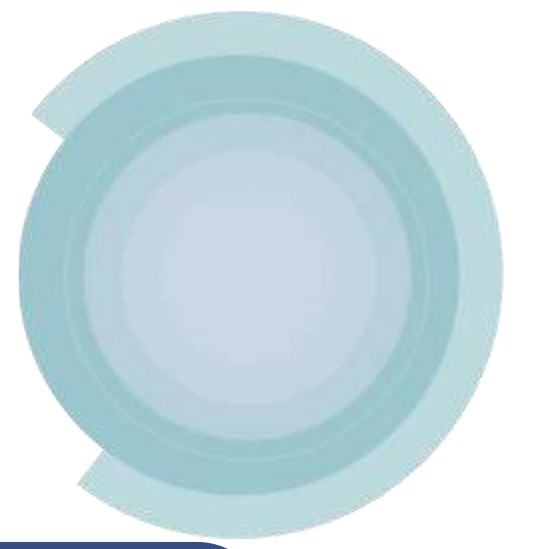
4. Approval of the Minutes and review of the Action Items from the September 17, 2026 PSC Meeting.

Informational Items

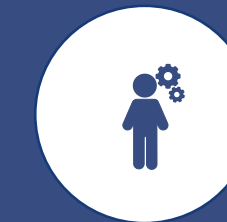
Update on CER to SCR Status and Plans

CER/SCR Process Update

Follow-Up



To mitigate concerns related to the lack of executive input, several actions have been taken or are in process

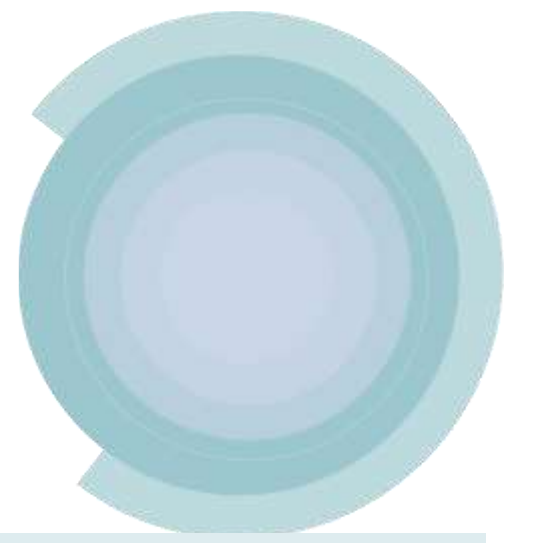


Mitigations

- ☒ Update CER form to ensure all details are considered (CIT to be Issued)
- ☒ Add PSC confirmation to SCR prioritization (starting in November)
- ☐ **Revisit Guiding Principles (See JPA Policy Manual)**
- ☐ **Review Scorecard with PSC to ensure alignment**
- ☐ Leverage bi-annual Strategic Planning Meeting to confirm or update priorities

CER/SCR Process Update

Current Guidelines



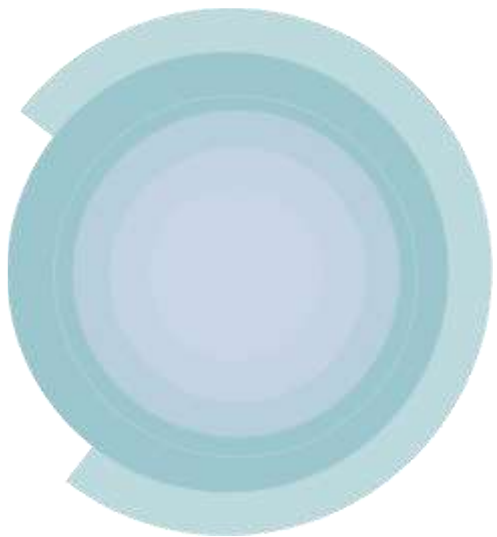
SCR Prioritization Aligns to Guiding Principles

Previously Approved by PSC, Currently Documented in Draft JPA Policy Manual

- Balance priorities so that the appropriate SCRs are queued up to start Design in order to meet mandated deadlines and not adversely impact County operations (within the Project's control).
- There will be one set of:
 - State: Reports, Forms, and NOAs
 - Non-compliance and Change Reasons
 - Rules for EDBC
 - Job Aids, Online Help, and Web Based Trainings (WBTs)
- All SCRs must be designed for 58 counties.
- All SCRs must be reviewed and approved by Consortium committees.
- Note some SCRs are exempt from the SPG process. This includes, but is not limited to:
 - Technical SCRs with no functional impact, such as third-party software upgrades.
 - Training SCRs (Online Help, Job Aids, Web Based Trainings, etc.).
 - Backend operational SCRs, such as adding an EBT printer or updating the county batch holiday calendar.
 - Self-Service Portal SCRs.
 - Premise/Change Order Funded SCRs. (includes County Purchase)

CER/SCR Process Update

Scorecard Review



- A scorecard is used by the SPG to identify the priority of an SCR.
- The scorecard is based on a predefined weighted scale and completed by the assigned Policy/Design Analyst and reviewed by SPG prior to approval.
- The scorecard was originally reviewed and approved through PSC and has been maintained with project changes (e.g., CalWIN migration from 40 to 58 counties)

Information About this Request	
Submitter Name:	

Change Request Information	
Summary: (include SCR # if available)	
(1) Change request type:	
(2) Reason for request:	
If Other, Please Explain:	
(3) Business driver of request:	

Business Impact Assessment	
(1) How many counties are impacted by the requested change?	
(2) Does the requested change directly impact benefits provided to Recipients?	
(3) How many different programs are impacted?	
(4) Approximate population impacted by this change request:	
(5) Can the change be handled through a reasonable alternative procedure, business process change or training?	
If Yes to question 5, briefly describe the alternative procedure:	
(6) What is the estimated effective date: (Primarily used for policy items, if no effective date, please select not applicable):	
Type in effective date:	

Risk Impact Assessment	
(1) Potential risk if not implemented timely:	
Please explain:	

SPG Priority Definitions	
SPG SCR Approval and Prioritization will be determined by considering many different factors. Some of these factors include – percentage of cases/workers impacted, Policy compliance and effective date, availability of alternate procedures, and priority of the SCR relative to other changes that have been deemed necessary.	
CRITICAL	
Work stoppage will occur and no alternative procedure exists OR Regulatory, Program Directive or Contractual Requirements will not be met.	
HIGH	
High impact to Caseload and/or Workers OR Alternative Procedure requires excessive time, cost and/or resources.	
MEDIUM	
Moderate impact to Caseload and/or Workers OR Alternative Procedure requires some increase in time, cost and/or resources.	
LOW	
Minimal impact to Caseload and/or Workers OR Alternative Procedure in place with minimal time, cost and/or resources. Also considered “nice to have” and are useful to pad out a release.	

Total Score: #N/A

Priority: #N/A

CER/SCR Process Update

Scorecard Review

The scorecard is broken up into three sections with 10 questions:

- Change Request Information
- Business Impact
- Risk Impact

All applicable fields of the form must be completed to assign the proper weighted value.

Information About this Request	
Submitter Name:	

Change Request Information	
Summary: (include SCR # if available)	
(1) Change request type:	Policy
(2) Reason for request:	JPA/PSC Strategic Initiative
If Other, Please Explain:	
(3) Business driver of request:	Compliance with Policy and Regulations

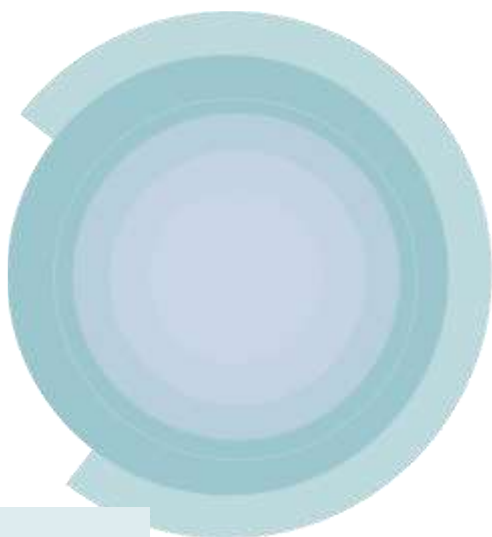
Business Impact Assessment	
(1) How many counties are impacted by the requested change?	58
(2) Does the requested change directly impact benefits provided to Recipients?	Yes
(3) How many different programs are impacted?	4+
(4) Approximate population impacted by this change request:	50,000+
(5) Can the change be handled through a reasonable alternative procedure, business process change or training?	No
If Yes to question 5, briefly describe the alternative procedure:	
(6) What is the estimated effective date: (Primarily used for policy items, if no effective date, please select not applicable):	Past Due
Type in effective date:	

Risk Impact Assessment	
(1) Potential risk if not implemented timely:	Increased Error Rates
Please explain:	

4	Total Score: 100
	Priority: Critical

CER/SCR Process Update

Scorecard Review - Change Request Information



Change Request Information (30% weight of overall score). 3 questions:

(1) Change Request Type: (Score)

- Documentation (0)
- Data Change (20)
- Enhancement (40)
- System Operational Enhancement (60)
- County Operational Enhancement (80)
- Policy (100)

2) Reason for Request: (Score)

- Other – Please Specify (0)
- County Specific Policy or Request (20)
- Operational Necessity (40)
- New Policy/Policy Redesign (60)
- Committee Priority (80)
- JPA/PSC Strategic Initiative (100)

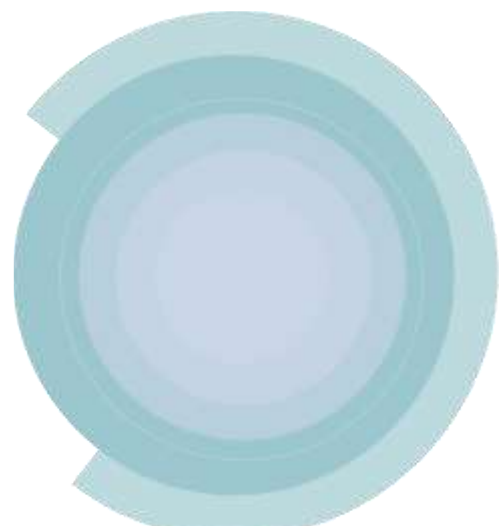
(3) Business Driver of Request: (Score)

- Supports Day to Day Operations (20)
- Enhances User Experience (40)
- Improves Productivity (60)
- Improves System Performance (80)
- Compliance with Policy and Regulations (100)

Change Request Information	
Summary: (include SCR # if available)	
(1) Change request type:	
(2) Reason for request:	
If Other, Please Explain:	
(3) Business driver of request:	

CER/SCR Process Update

Scorecard Review – Business Impact Assessment



Business Impact Assessment (50% weight of overall score) - 6 questions:

(1) How many Counties are impacted by the Requested Change? (Score)

- 0 (15)
- 1 (30)
- 2 – 20 (45)
- 21 – 39 (60)
- 40-57 (75)
- 58 (100)

(2) Does the requested change directly impact benefits provided to Recipients? (Score)

- No (20)
- Yes (100)

(3) How many different programs are impacted. (Score)

- N/A (20)
- 1 (40)
- 2 (60)
- 3 (80)
- 4+ (100)

(4) Approximate population impacted by this change request. (Score)

- 0 – 500 (20)
- 501 – 2,000 (40)
- 2,001 – 10,000 (60)
- 10,001 – 50,000 (80)
- 50,000+ (100)

(5) Can the change be handled through a reasonable alternative procedure, business process change or training? (Score)

- Yes (20)
- No (100)

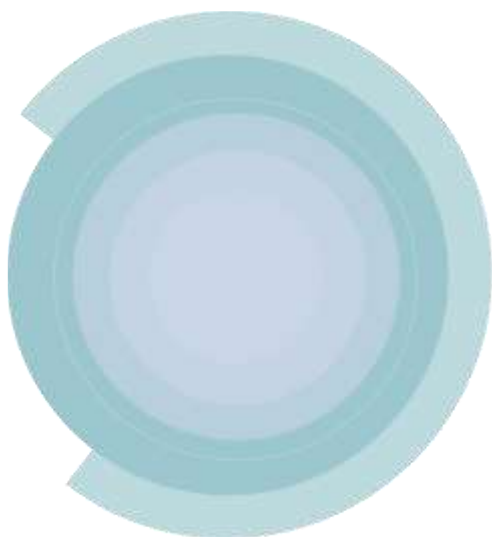
(6) What is the estimated Effective Date: (Score)

- Not Applicable (0)
- Over a Year from Now (20)
- In 7 – 12 Months (40)
- In 4 – 6 Months (60)
- In 0 – 3 Months (80)
- Past Due (100)

Business Impact Assessment	
(1) How many counties are impacted by the requested change?	
(2) Does the requested change directly impact benefits provided to Recipients?	
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Type in effective date:	

CER/SCR Process Update

Scorecard Review – Risk Impact Assessment



Risk Impact Assessment (20% weight of overall score). 1 question:

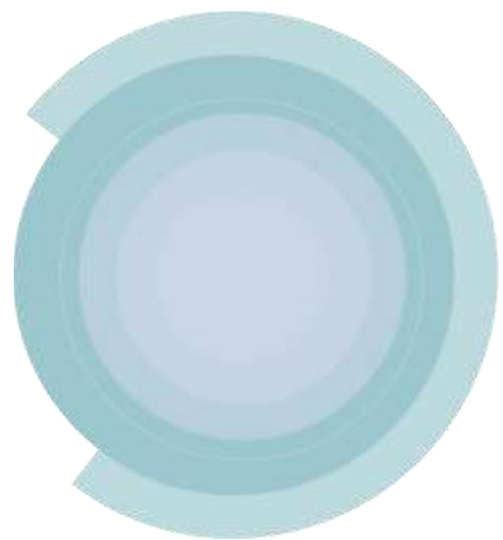
(1) Potential Risk if not Implemented Timely: (Score)

- None (0)
- Resource Efficiency (15)
- System Performance (30)
- Potential Litigation (45)
- In Litigation/Court Judgment (60)
- Impact to Customer (75)
- Increased Error Rates (100)

Risk Impact Assessment	
(1) Potential risk if not implemented timely:	
Please explain:	

CER/SCR Process Update

Scorecard Review



Score Range and Priority

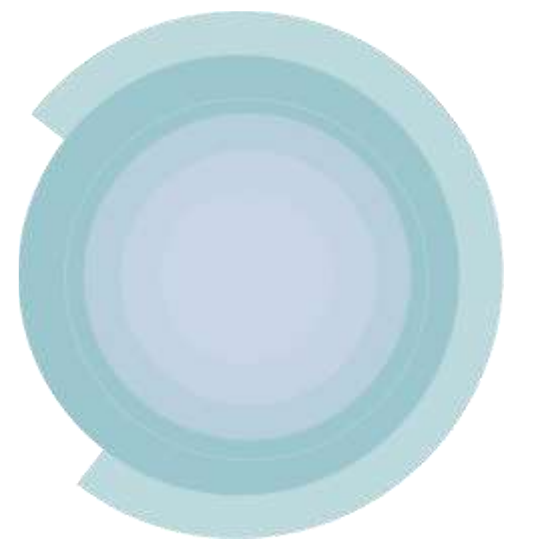
Score Range	Priority
85 - 100	Critical
70 - 84	High
45 - 69	Medium
0 - 44	Low

Priority Definitions

SPG Priority Definitions
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CER/SCR Process Update

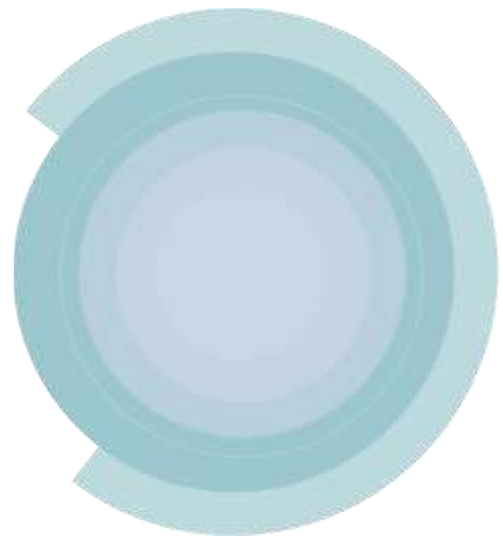
Next Steps



- JPA Board to provide feedback on guiding principles as documented in the JPA Policy Manual – October - November
- JPA to approve guiding principles as documented in the JPA Policy Manual - December
- PSC to provide feedback on scorecard – October
- PSC to approve scorecard – November

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

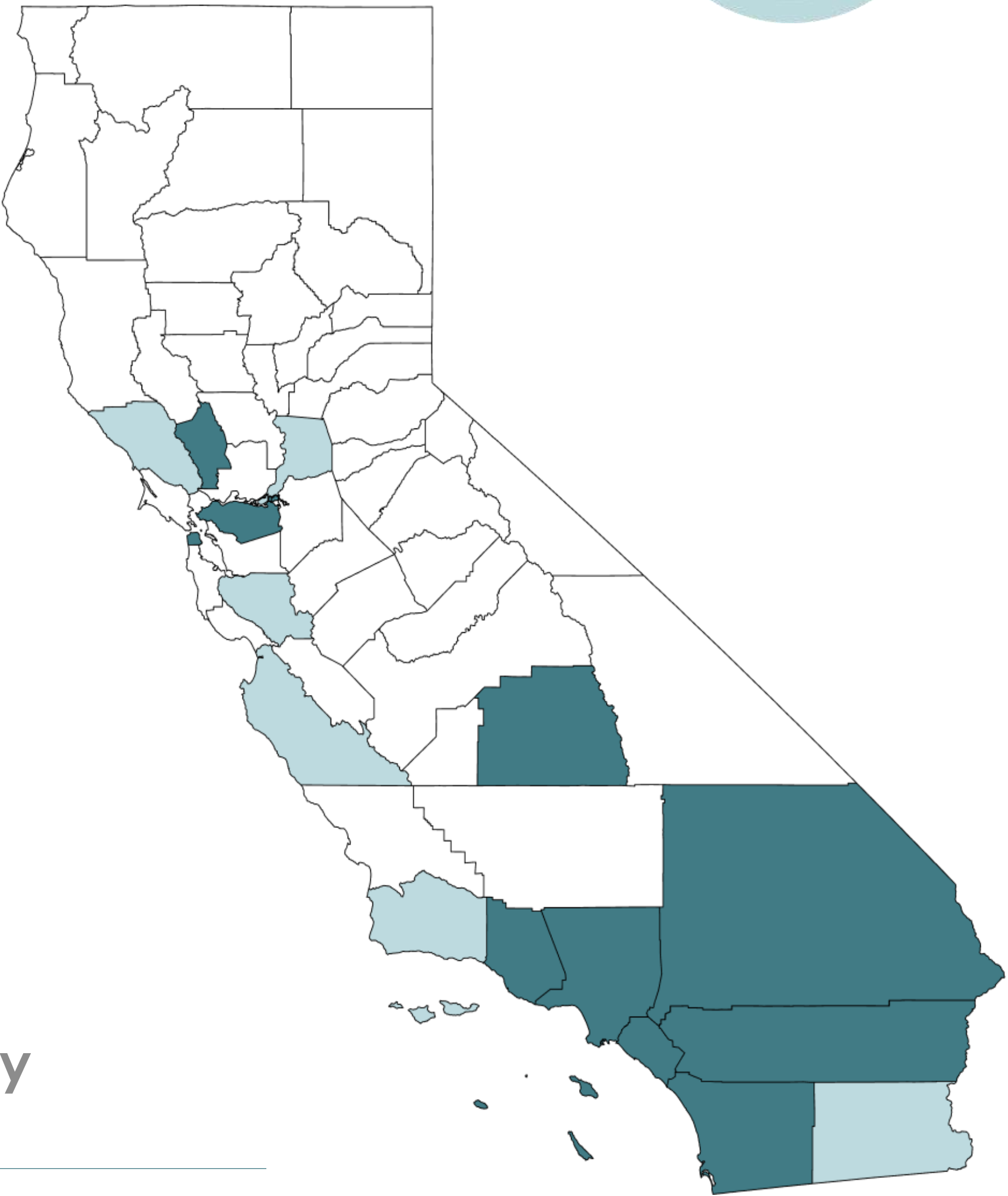
Counties Visited

- 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.



*County Visit Project Steering Committee 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

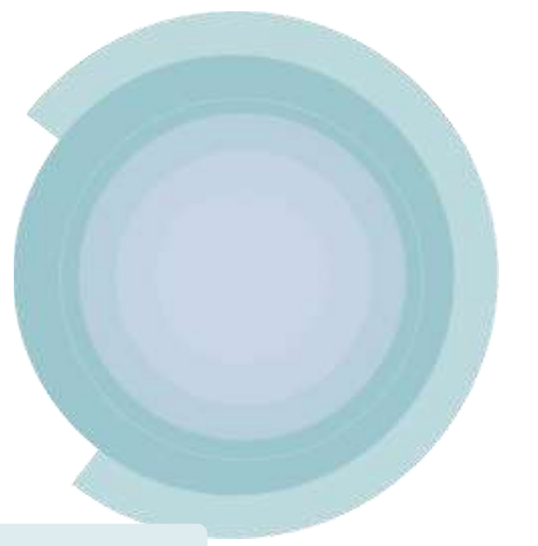


Manual NOA generation slows customer communication and increase customer call backs

"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

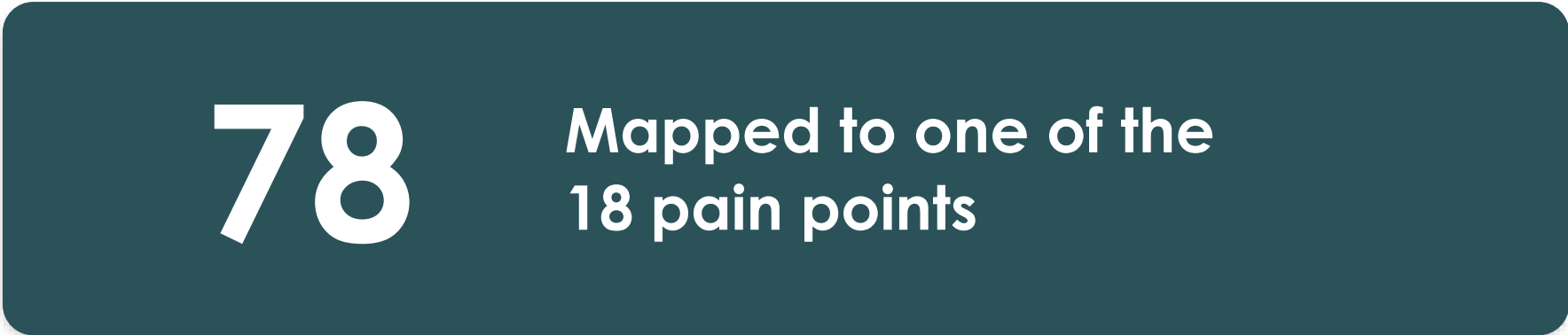
"We need easy way to support job search, track hours, and verify status within CalSAWS. "

Where County Pain Points Meet Submitted CERs



160

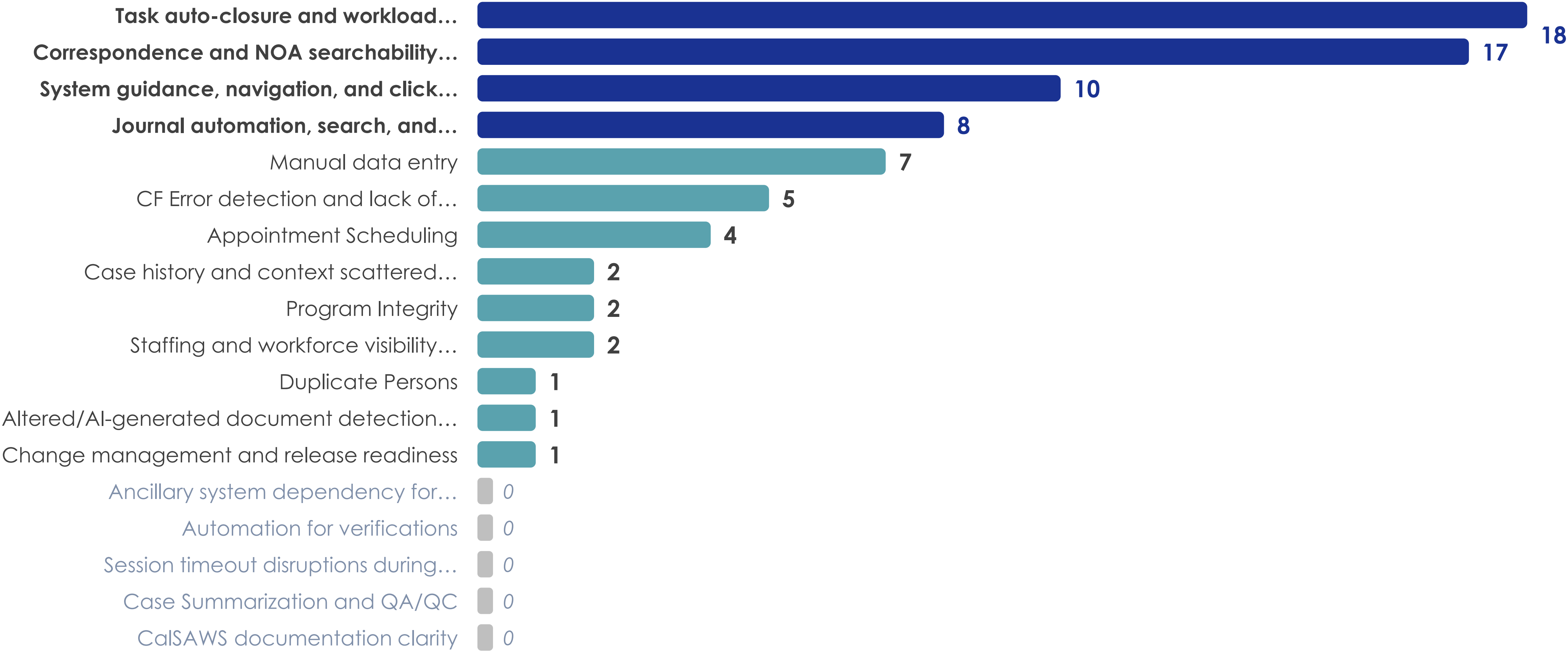
CERs REVIEWED



6 emerging themes within the 82



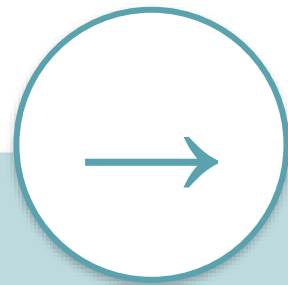
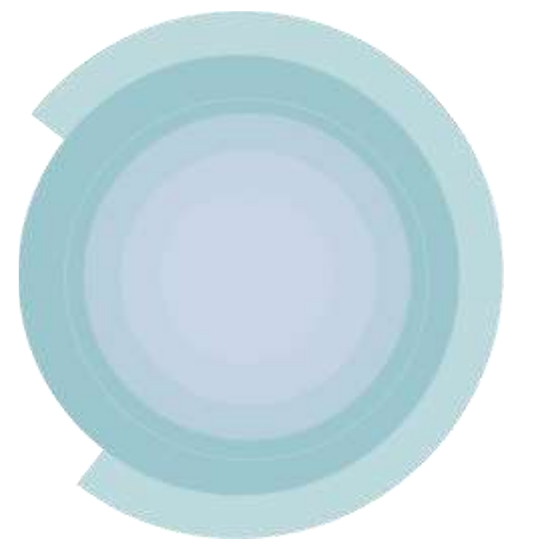
Where County Pain Points Meet Submitted CERs



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

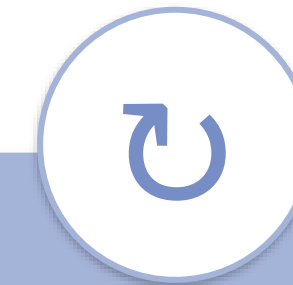
- Changes reach counties faster
- Engineering time shifts from manual busywork to the problems counties raised



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

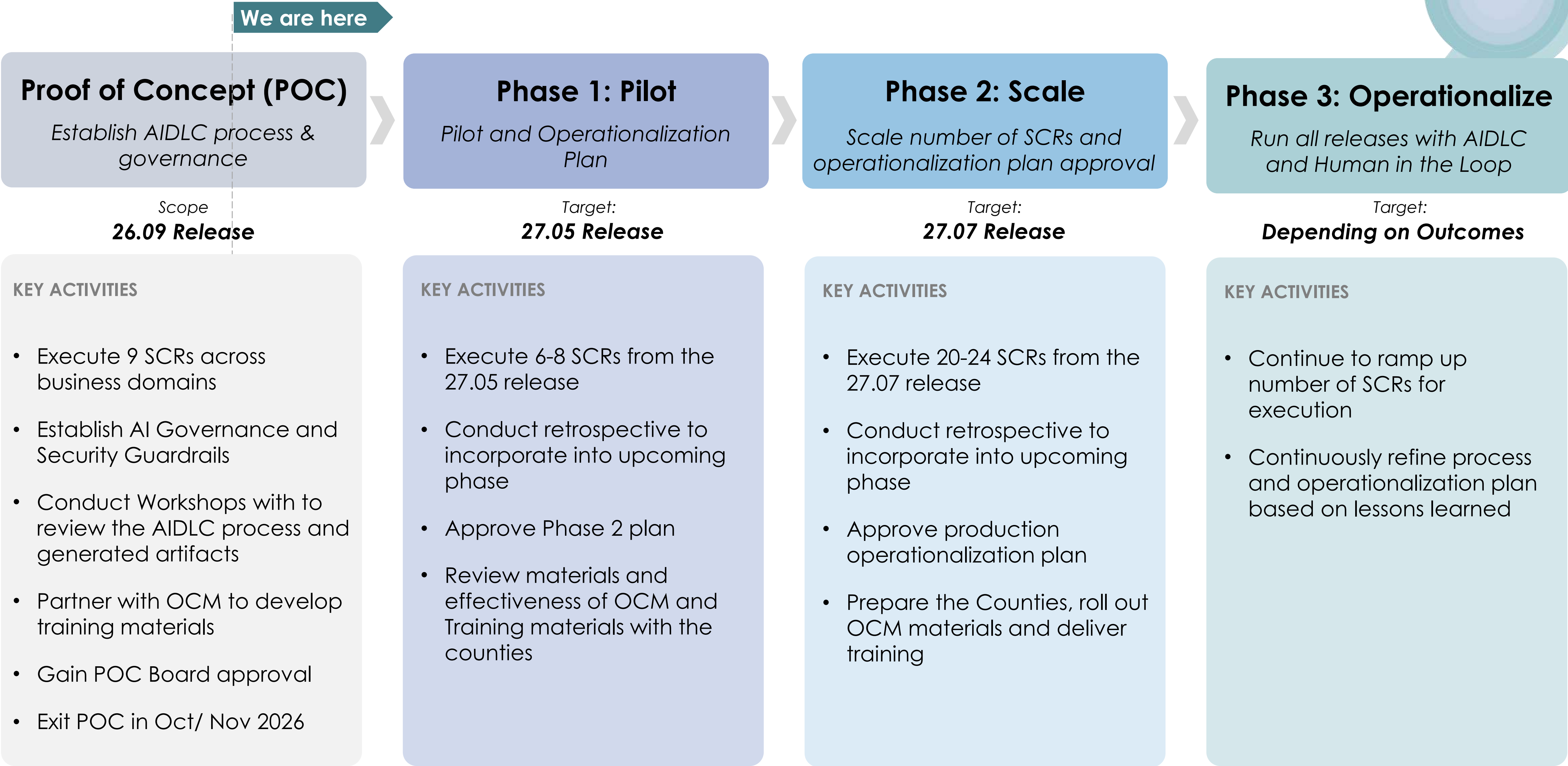
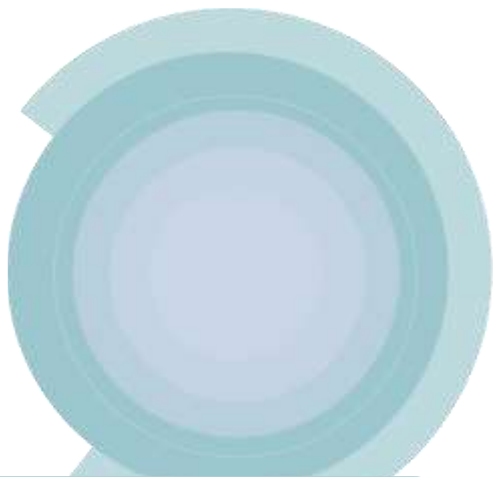


Change Management

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

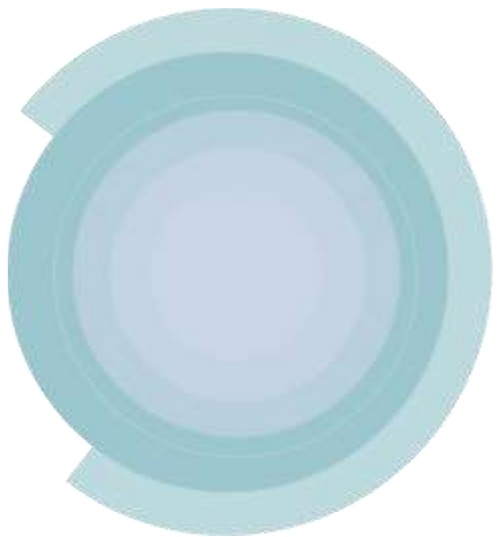
AI DLC Tentative Timeline



Innovation Update

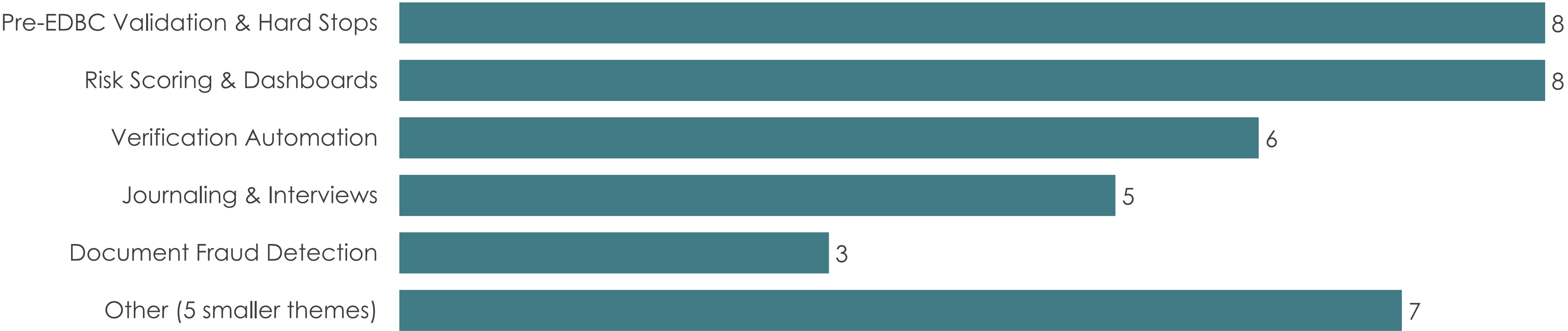
Grouped Submissions to Distinct Ideas

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



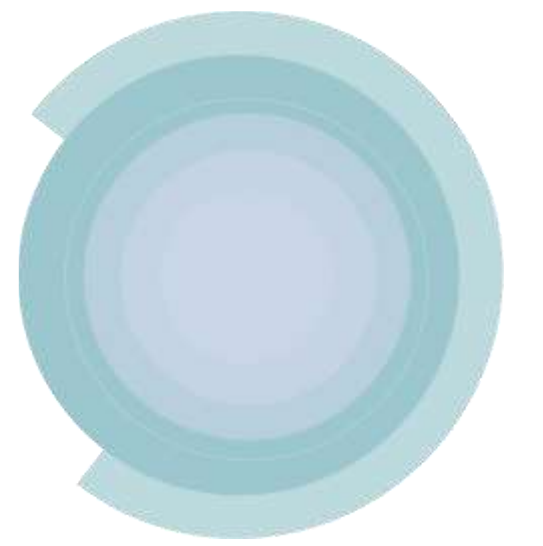
Many respondents proposed the same underlying fix in different words. Overlapping submissions were grouped together, collapsing 37 raw submissions into 20 distinct ideas for review.

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 CalSAWS' standard Change Enhancement Request process - not new to the Innovation pipeline.

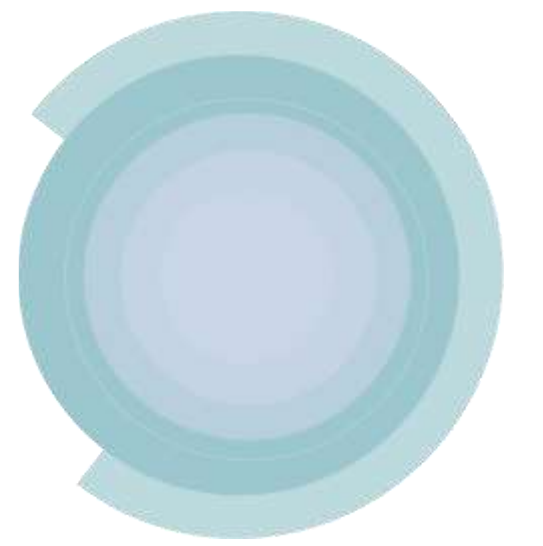
EXAMPLES

- 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

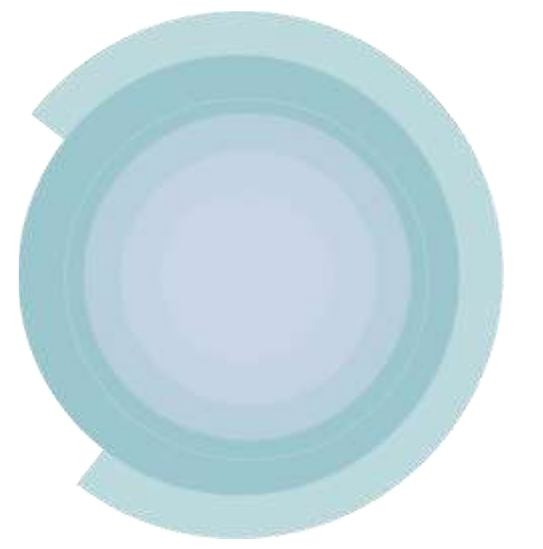
PoC and pilot results are brought back for recommendation and final approval - closing the loop with the Panel and this Board.

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

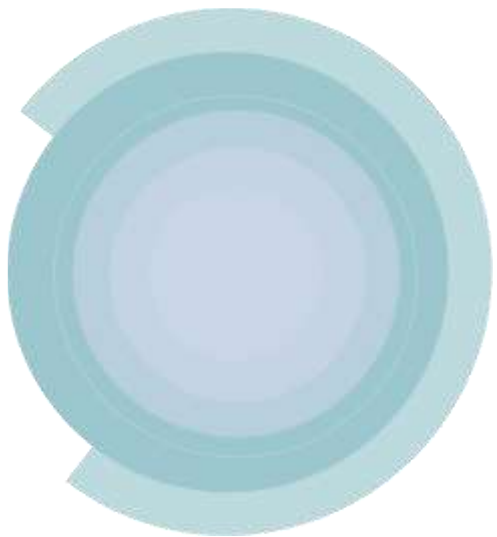


Operational complexities have been identified which prompted reconsideration of the visualization tool to mitigate risk.

- 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

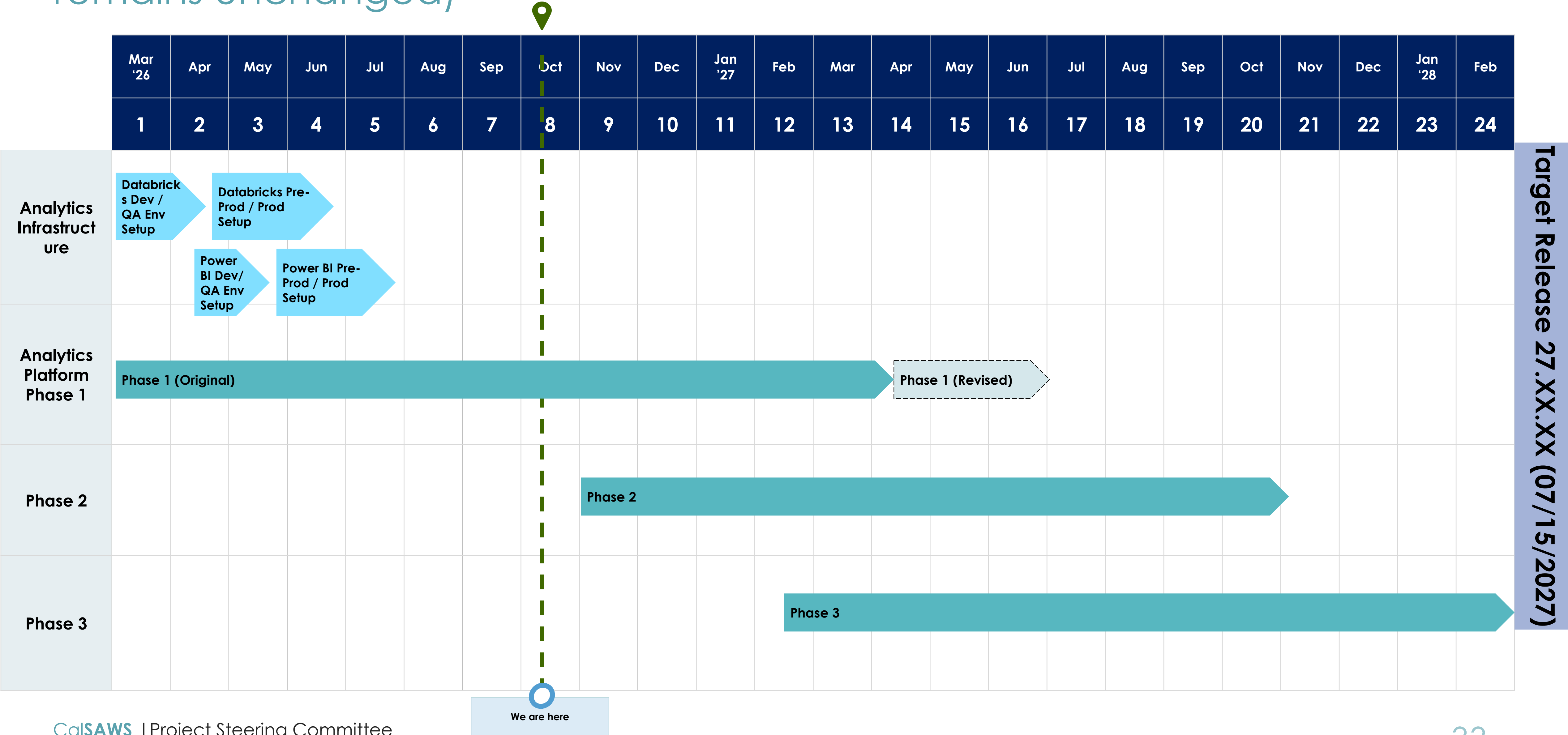
Power BI meets these requirements, just with more complexity, cost, and less room to grow



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

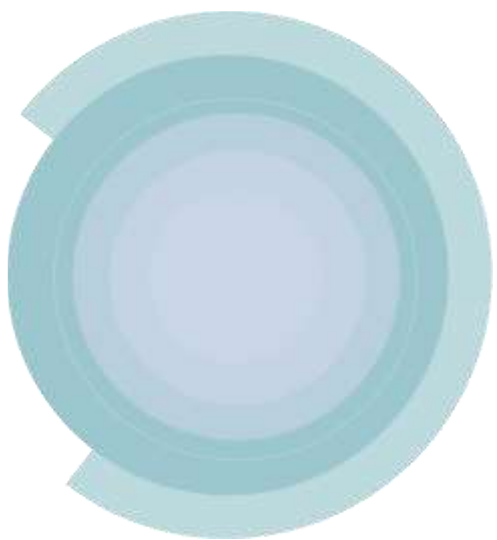
Phase 1,2 & 3 Execution Timeline March 26 – Feb 28 (overall timeline remains unchanged)



BenefitsCal Update

BenefitsCal Update

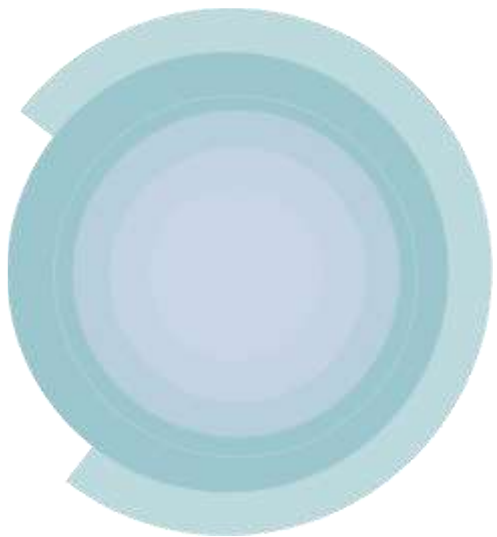
Priority and Baseline Releases



September Baseline Release	November Baseline Release	December & January Priority Release
- CSPM-80929: Semi-Annual Redeterminations – MAGI New Adult Group. <i>Released, functionality turned off</i> - CSPM-84131: Update BenefitsCal Dashboard for Case and Program Details for the new MC 216. <i>Released, functionality turned off</i>	- CSPM-80928: Work and Community Engagement Rule for Individuals in MAGI New Adult Group - CSPM-84764: H.R. 1- Updates to the Mixed Household RE Form - CSPM-85151: H.R. 1 - Update the Renewal Tracker for MC Person Level Renewals	01/01/2027: - CSPM-84162 Turn on H.R. 1 changes 01/10/2027: - CSPM-84459: Migrate from ForgeRock to Okta (Identity and Access Management System)

BenefitsCal Update

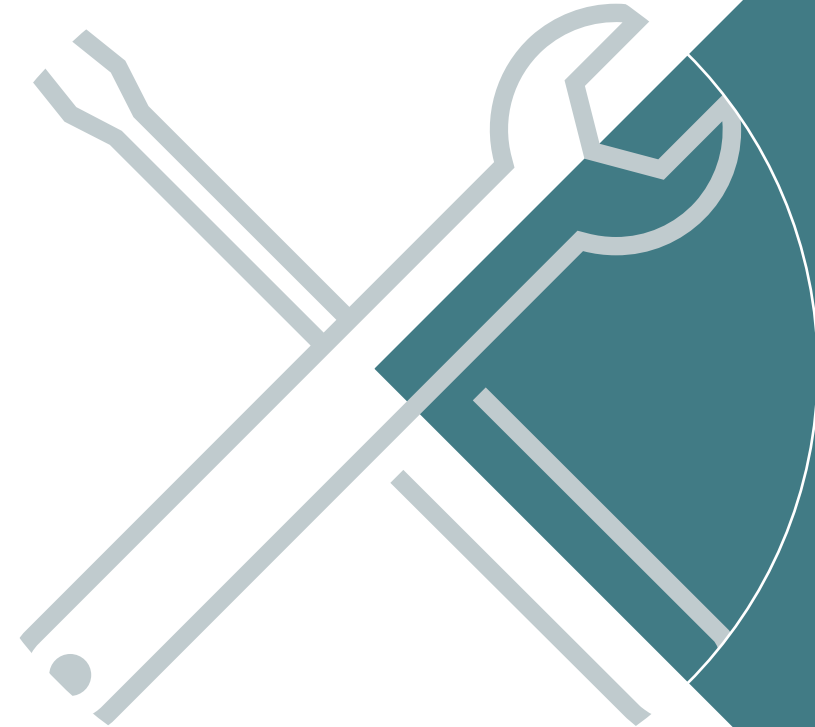
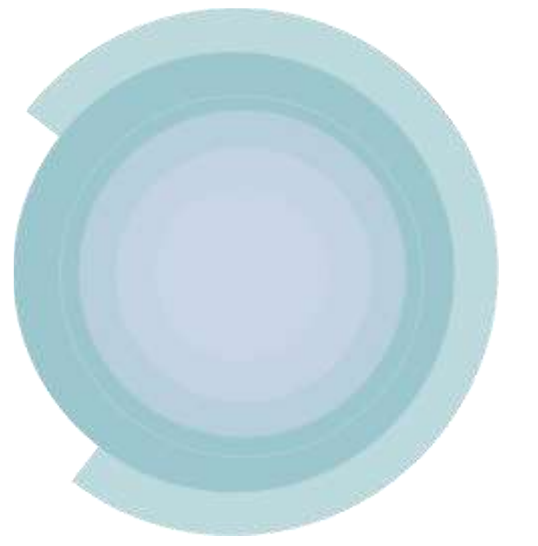
Priority and Baseline Releases



January Baseline Release	February Priority Release	March Baseline Release
CSPM-83660: Truv Phase 2 – New landing page and integration with CalSAWS	CSPM-84620: H.R. 1-Work and Community Engagement Rule Phase 2	- CSPM-78624: ROI to CBO in BenefitsCal (ACL 24-91 / ACWDL 24-21) - CSPM-71672: Collaboration Model: Disability Accommodations - CSPM-84880: Update the AFB Income Summary Screens to Display Income Break

BenefitsCal Update

Truv

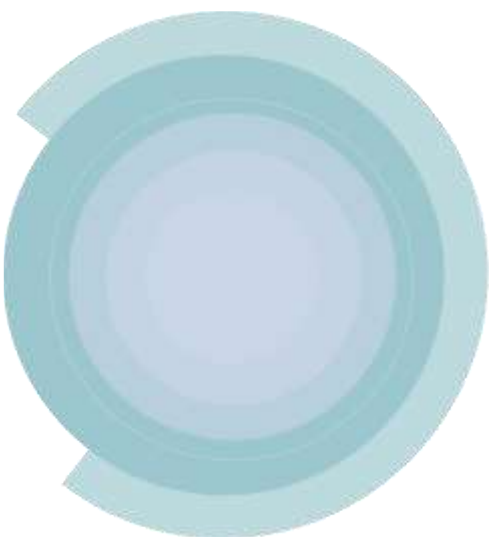


Resolved pay stub and pay frequency issues as communicated at the September JPA and PSC meetings, Total Truv Orders submitted to CalSAWS as of 9/29/2026 are 28,135



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

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

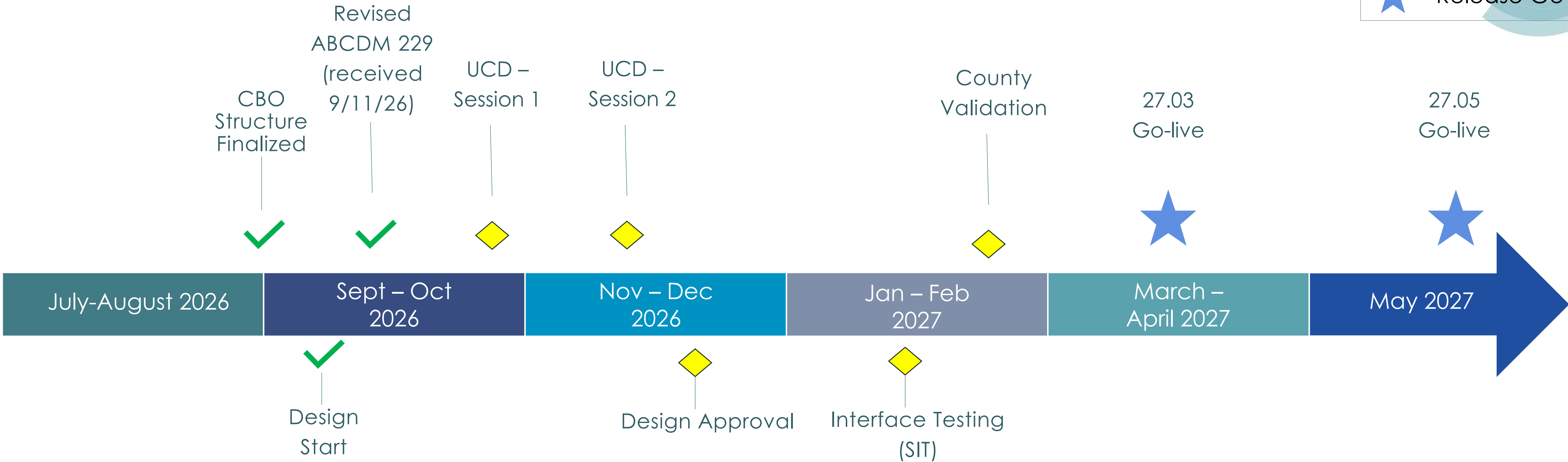
1. Update CalSAWS to capture ABCDM 229 for CBOs that do not have a BenefitsCal Account.★
2. Update CalSAWS to nudge and search for pending ROIs at the time of renewals, re-applications and for ESAP households.+
3. Display termination reasons on CBO and Customer dashboard.+
4. Update CalSAWS to capture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

Target: May 2027

ROI – Timeline

Phases and Milestones

Legend	
✓	Task Complete
◆	Milestone
★	Release Go-live



Phase 1A



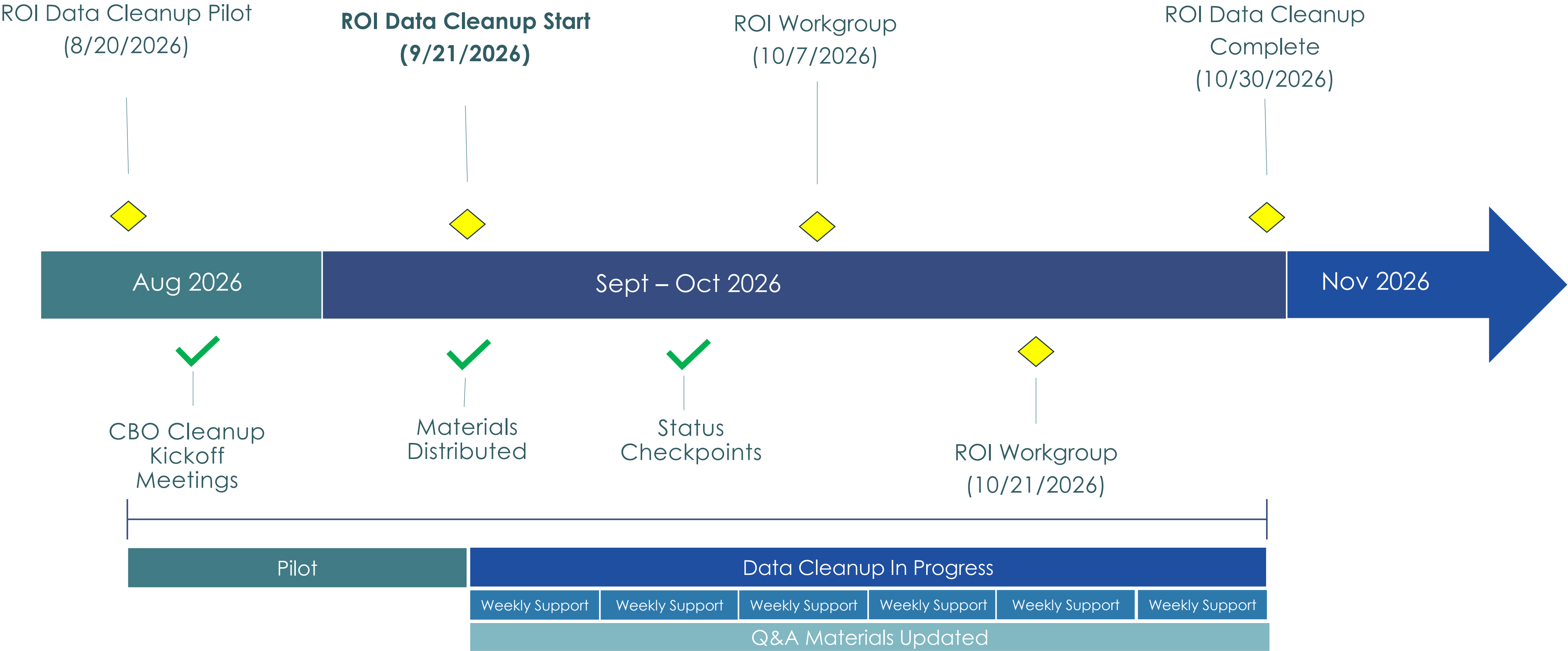
Phase 1B - Release 27.03: CalSAWS, BenefitsCal and Okta system changes

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

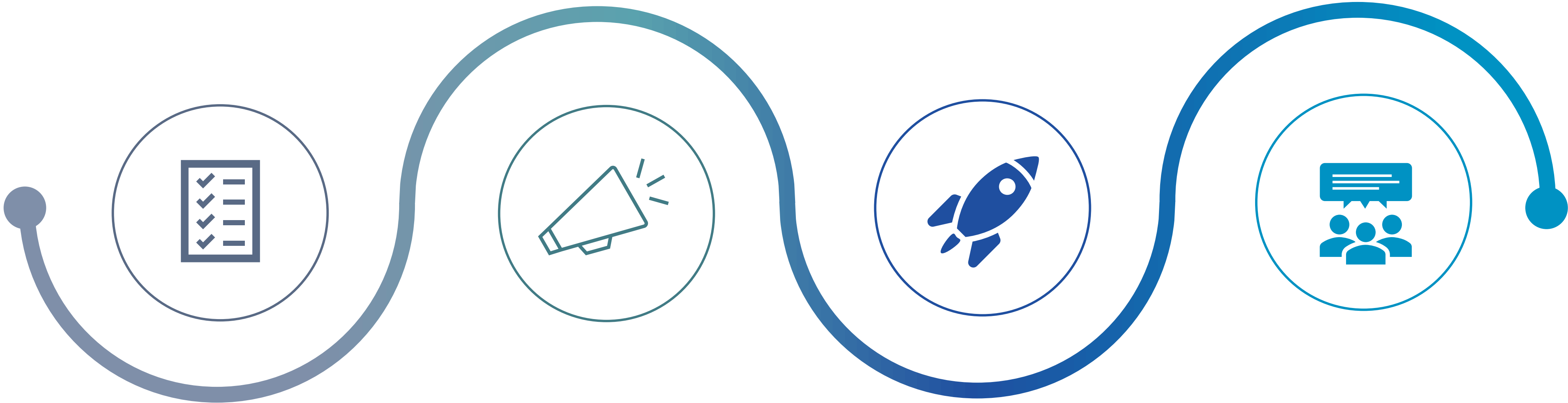
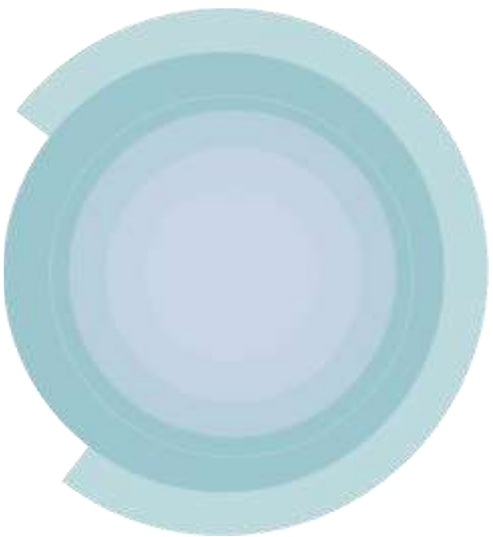
- ✓ CIT-0152-26: Access to TWN portal restricted to IEVS, Special Unit, and QC staff.
- ✓ CIT-0152-26: The request restricts timeframe to three-months. Errors for records beyond the timeframe caused confusion to the county workers.
- ✓ Counties were provided a complex process to gain technical support.

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

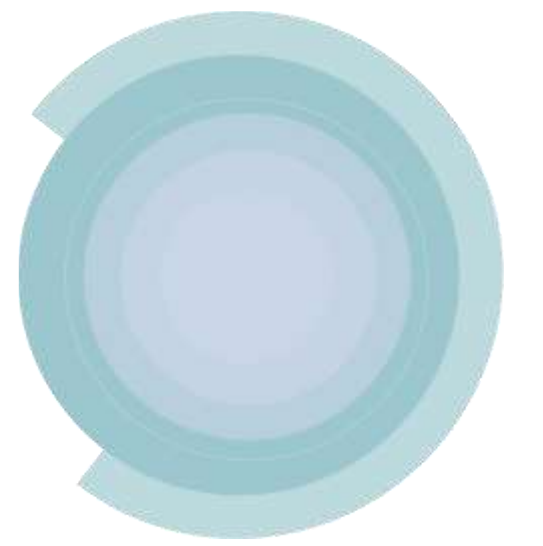
POST RELEASE

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



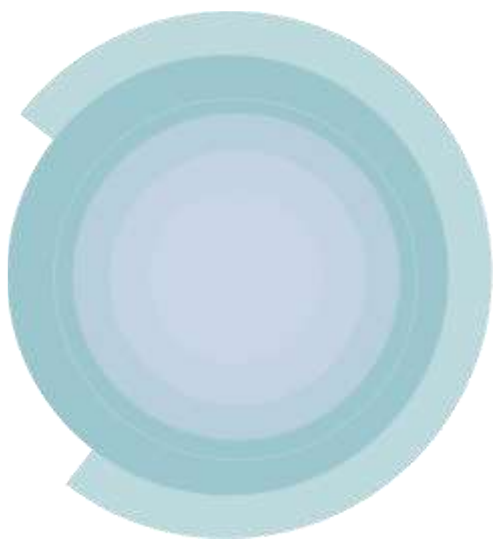
- CA-300677 - CMSP Eligibility Changes
- CA-296573 - CalFresh Processing HR1 Work Group - Targeted nudges and navigation improvements
- CA-274867 - Create new page to display Skipped Issuances
- CA-256864 - Add Threshold Languages for TNB 4 Recertification Packet AND Add Additional Forms to the TNB RE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

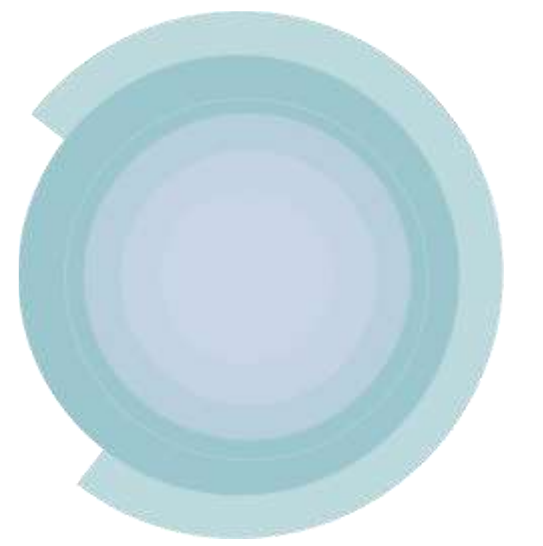
Additional Upcoming Releases



October Priority Releases 37 SCRs ~6k hrs	November Priority Releases 21 SCRs ~2.7k hrs	December Priority Releases 17 SCRs ~13k hrs
10/08/2026: - County Preview Environment - Configure MC HR 1 functionality to be turned on (CA-302348) 10/14/2026: - The Work Number – Update Age Criteria to 18 years when Batch processing (CA-305160) 10/29/2026: - Revise CW 115 and 115A per ACL 23-91 (CA-272456)	11/12/2026: - Enhancements to the CF-296 State report (CA-293235) 11/XX/2026: 2027 CAPI COLA Values (CA-290706) 2027 Social Security COLA Values (CA-301061) - Update 2027 CalSAWS Batch Calendar (CA-295181) 2027 MEDS Renewal, Recon Schedule, RE Packets and Release dates (CA-295179)	12/XX/2026: 2027 CAPI COLA Batch EDBC Run (CA-290707) 2027 Social Security COLA Batch EDBC Run (CA-301062) 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 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

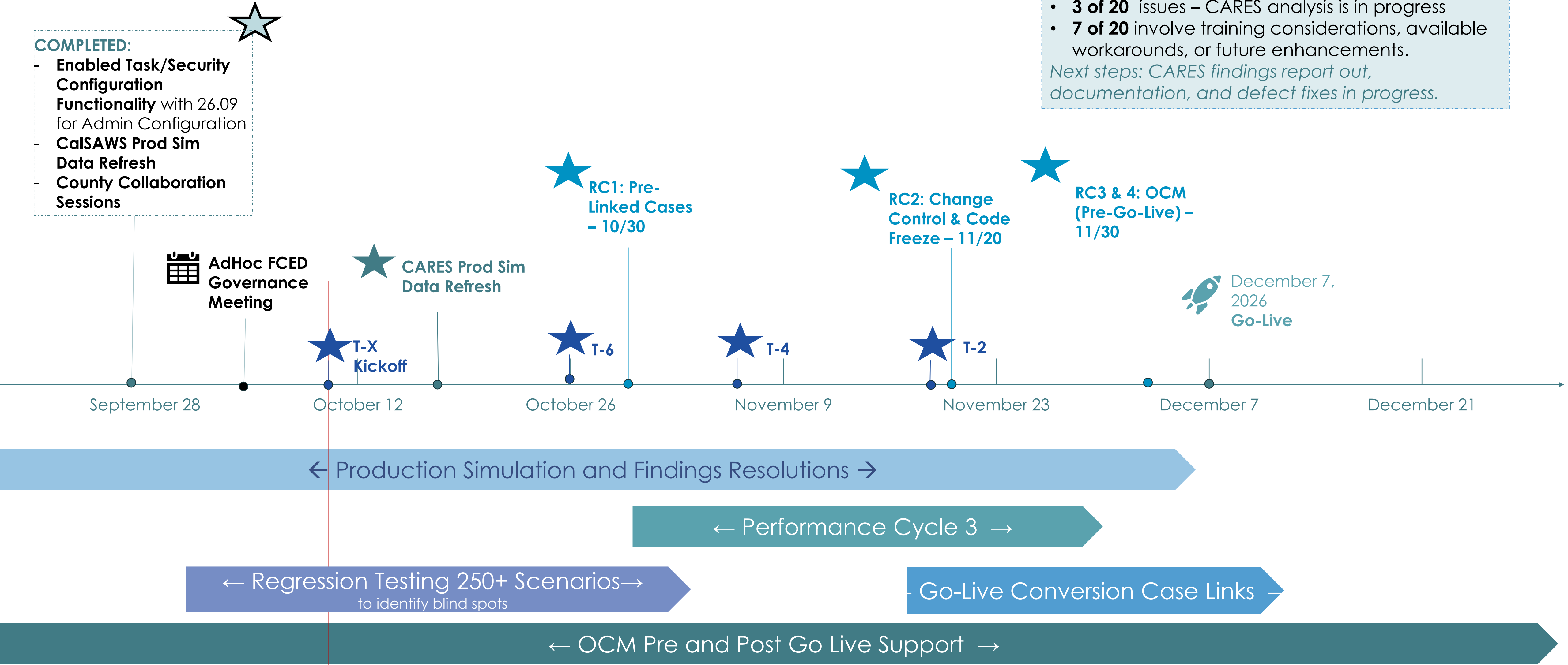
COMPLETED:

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

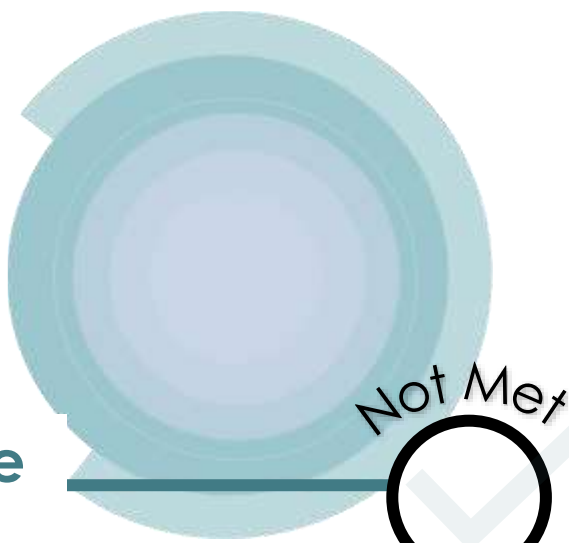
Report Out: 20 CARES observations across 4 counties:

- 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**)



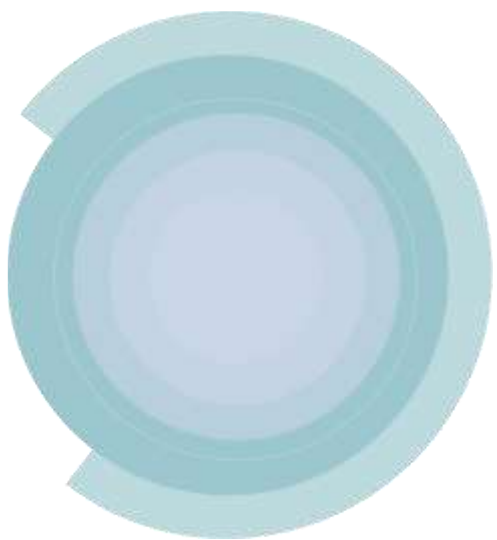
Vendor Extract Update

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



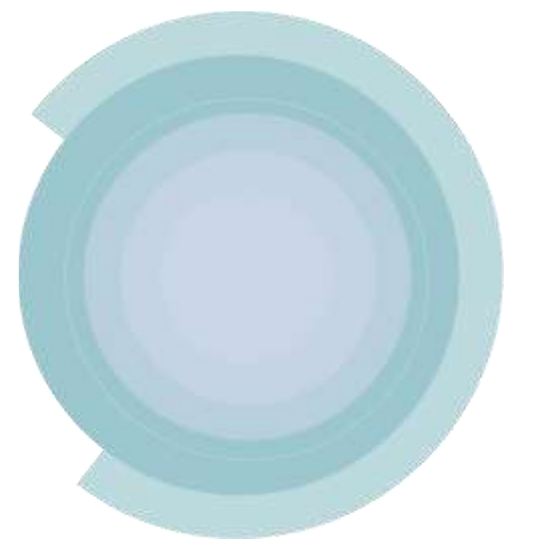
Resource Materials

- 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.

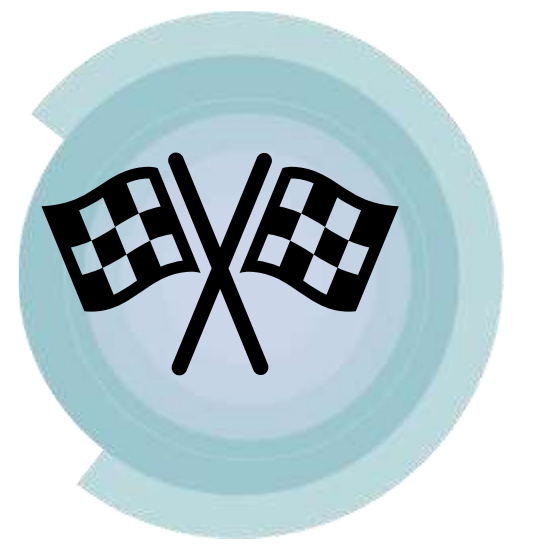
Infrastructure Update



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

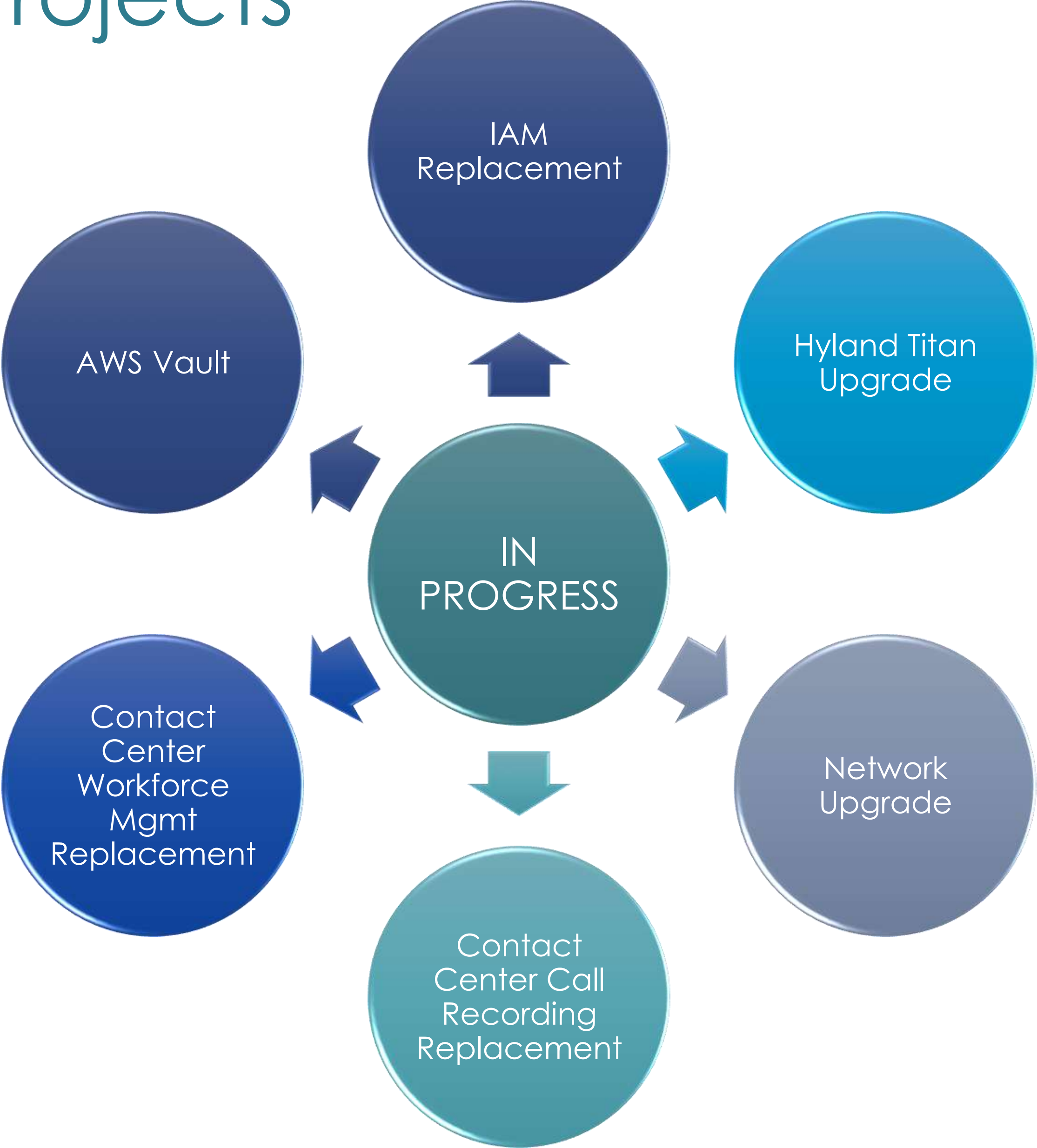
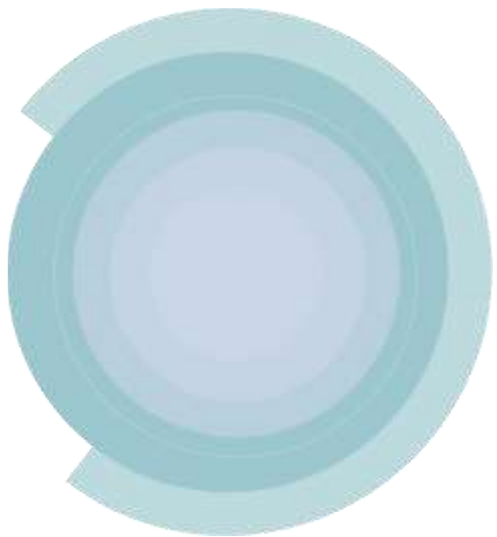
- Created additional capacity which can be accessed immediately
- Reduced batch processing time
- Reduced time to create masked databases
- Successfully performed disaster recovery test

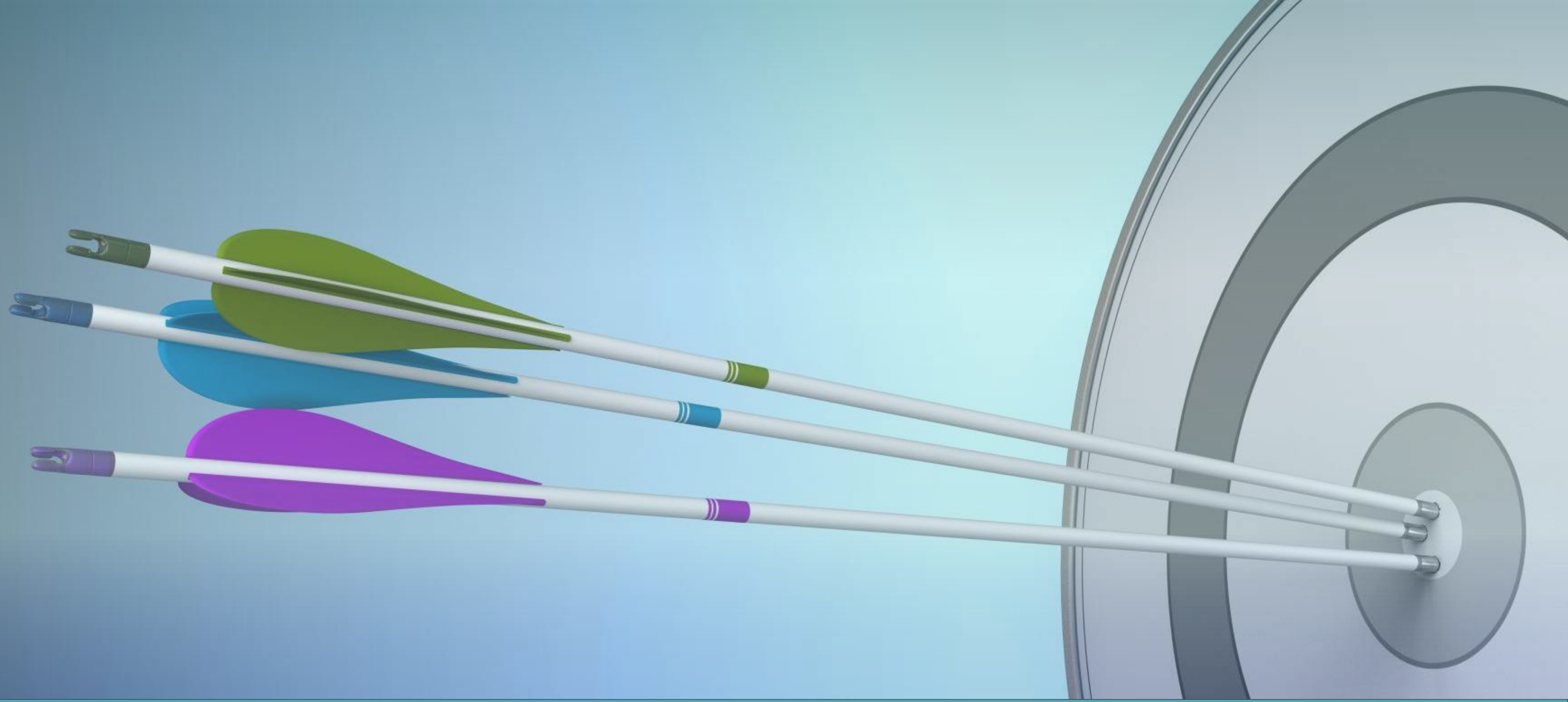
Online

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

Infrastructure Projects

Large Projects in Progress

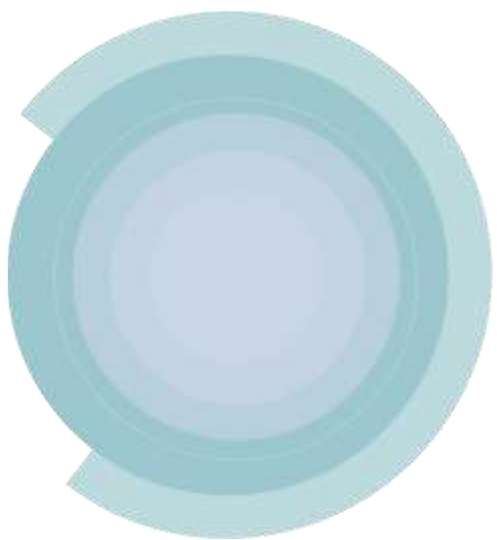




Call Summarization

Contact Center – Call Summarization

Group 1 and 2 Counties



Group 1
(Complete)

- Contra Costa
- Orange
- Marin
- San Mateo
- Monterey
- Santa Clara
- Santa Cruz
- Sacramento
- San Francisco
- Solano

Group 2
(In Progress)

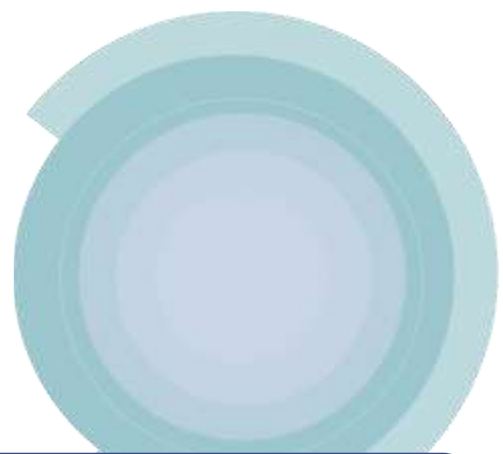
- Fresno
- Stanislaus
- Kern
- Kings
- San Bernardino

- Up Next
 - San Luis Obispo
 - Santa Barbara
 - Ventura

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

Metrics Since Launch

Results from April 10th to Sept 18th – 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

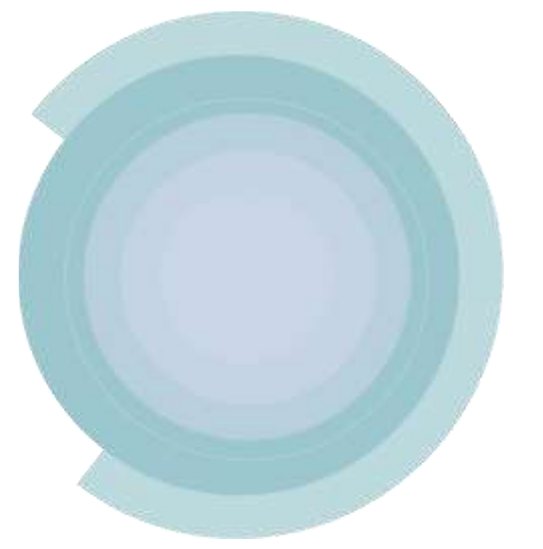
County Readiness Activities

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

CalSAWS Learning Exchange Update

CalSAWS Learning Exchange Sessions

Objective



- CalSAWS Learning Exchange (CLE) sessions provide timely, relevant education for regions on identified topics and allows for Q&A with counties.
- Assess topics ongoing that present challenges for counties and, where appropriate, hold focused CLE sessions to better assist counties in gaining a fundamental understanding of the identified topic(s).
- When possible, the sessions may include willing county partner/s to highlight best practices and lessons learned.
- Align with Project teams on the CalSAWS Roadmap to avoid redundancies and ensure identification of relevant topics gets addressed.

CalSAWS Learning Exchange Sessions

CLE Planning Schedule 2026 - 2027



Cultivating CalSAWS Community



Next Steps

- **Upcoming Sessions-** Counties receive notification of upcoming CLE activities via Broadcast Notifications followed by meeting invites being sent to County PPOCs to forward to their county staff who they believe who benefit from the respective sessions.
- **County Collaboration-** Counties who have valuable best practices, lessons learned, or business processes to share on requested topics are encouraged to let their RMs know they would like to be considered for inclusion in a specific presentation.
- **Request a CLE Topic-** Via Regional Meetings or contacting your region's RM team; include content desired and priority level (Low, Medium, High) for the topic.



State Partners Updates



State Partners Updates

Adjourn Meeting