Project Steering Committee Meeting

November 12, 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

- Approval of the Minutes and review of the Action Items from the October 8, 2026 PSC Meeting.

Informational Items

2027 Strategic Planning Meeting Location

2027 Strategic Planning Meeting Location

Proposed for JPA Approval

Monterey

April 28 – 30, 2027







CER to SCR Status and Prioritization

SPG Scorecard

Status and Next Steps

Status & Next Steps

Completed

- ☒ Reviewed the SPG Scorecard with PSC
- ☒ Gathered and reviewed feedback from PSC members
- ☒ Proceeded with the existing PSC approved scorecard criteria and county pain points to establish recommended priorities for CER-originated SCRs

Next Steps

- ❑ PSC confirmation of the SPG Scorecard criteria
- ❑ On-going adjust SPG Scorecard as needed to maintain alignment with county priorities

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

SPG Scorecard

Feedback

R1 **"The scorecard process is well thought out"**

Question: What happens if there is a disagreement with the final score OR a circumstance changes?

Answer: The SPG Scorecard can be revisited, and responses to individual questions can be adjusted if circumstances or priorities change. Additionally, PSC retains the discretion to prioritize an SCR over others regardless of its SPG score when deemed appropriate.

R2 **"I have reviewed again and have no concerns or questions. It is fairly straight forward and unless other concerns are raised by other regions, this is something I can support"**

R3 **"No concerns, suggestions, or feedback regarding the SPG Scorecard at this time"**

SPG Scorecard

Feedback

R4 **"No recommended changes to the SPG Scorecard or how the score is rated"**

Question: Will additional details be provided with the request, how much time will PSC members have to review the scorecard, and where should questions be directed?

Answer: PSC will receive a list of CER-originated SCRs with completed SPG Scorecard results to support prioritization recommendations. The list will include SCR summary descriptions and alignment with identified county pain point.

The SCR list and supporting presentation materials will be distributed with the PSC board packet one week before the meeting to allow time for review.

PSC members may provide feedback on SPG scores and prioritization recommendations during the PSC meeting or share their questions and feedback with their RMs for follow-up and discussion at a subsequent PSC meeting.

R5 **No feedback at this time.**

SPG Scorecard

Feedback

R6

Comments/Questions for Consideration:

Comment: We have a concern with scoring of the various sections within the scorecard and how they will determine how the weight that will be allocated to determine prioritization, since the scoring can be highly subjective.

Answer: Please note that all SPG Scorecards also undergo an independent review by our QA partner to ensure that the questions have been answered appropriately based on the information documented in the CER and SCR.

Additionally, PSC retains the discretion to prioritize an SCR over others, regardless of its SPG score, when deemed appropriate based on business needs and other considerations. The SPG Scorecard will also be monitored and maintained to ensure continued alignment with county priorities. As updates or potential adjustments are identified, they will be brought forward to PSC for review and approval.

Question: Does this effort also include merging topics into one SCR for related topics?

Answer: Yes. Where feasible and capacity allows, the teams will look for opportunities to consolidate related changes.

SPG Scorecard

PSC Confirmation

- Does PSC have any additional feedback or recommended changes to the SPG Scorecard?

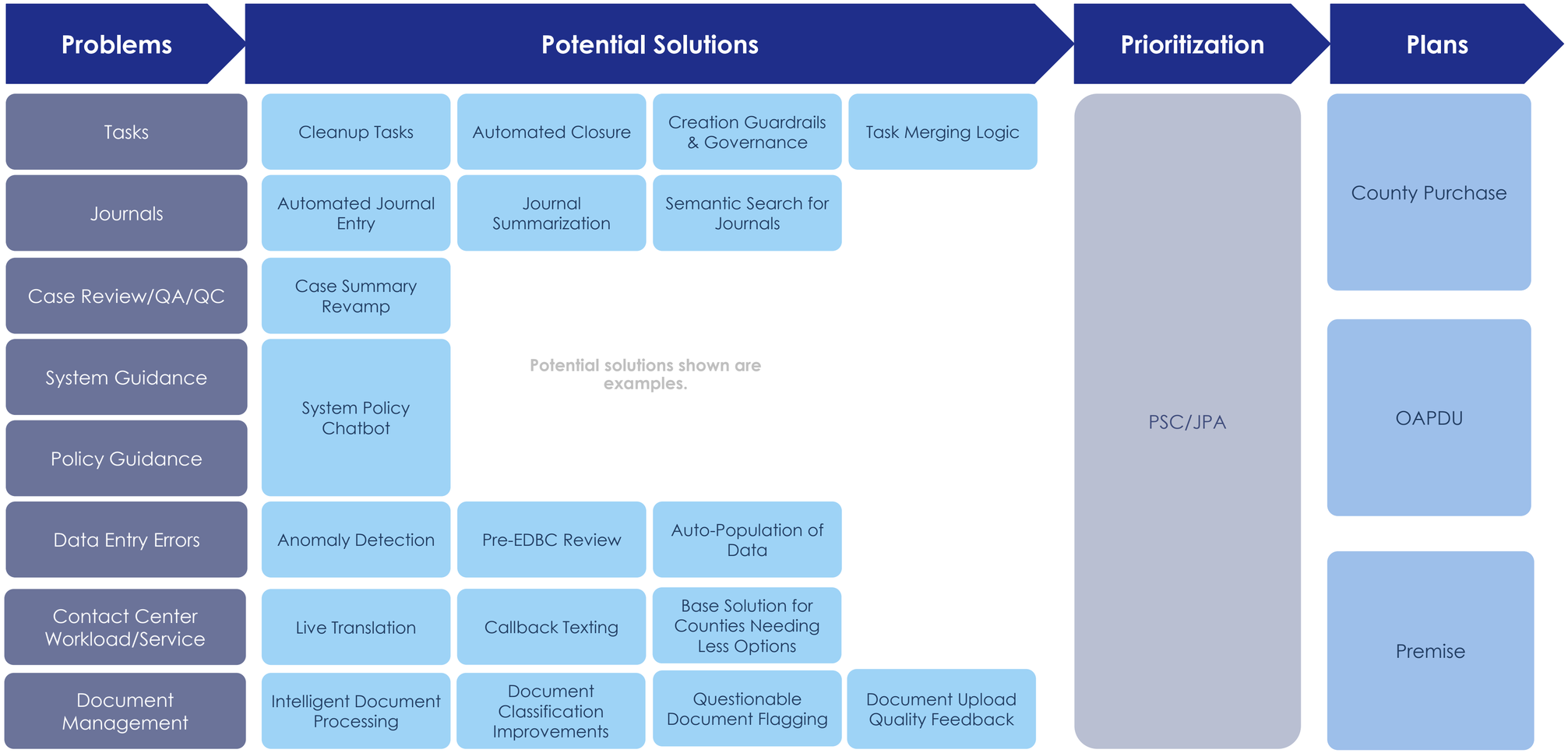
- Does PSC approve the SPG Scorecard and its criteria for use in prioritizing CER-originated SCRs?

Strategic Planning Preparation

Research is underway to address feedback received to-date and to prepare for strategic planning/prioritization discussions.

ROADMAP INFORMED BY

County Visits
CERs/SCRs
JPA/PSC
MSVs
Policy
Innovation



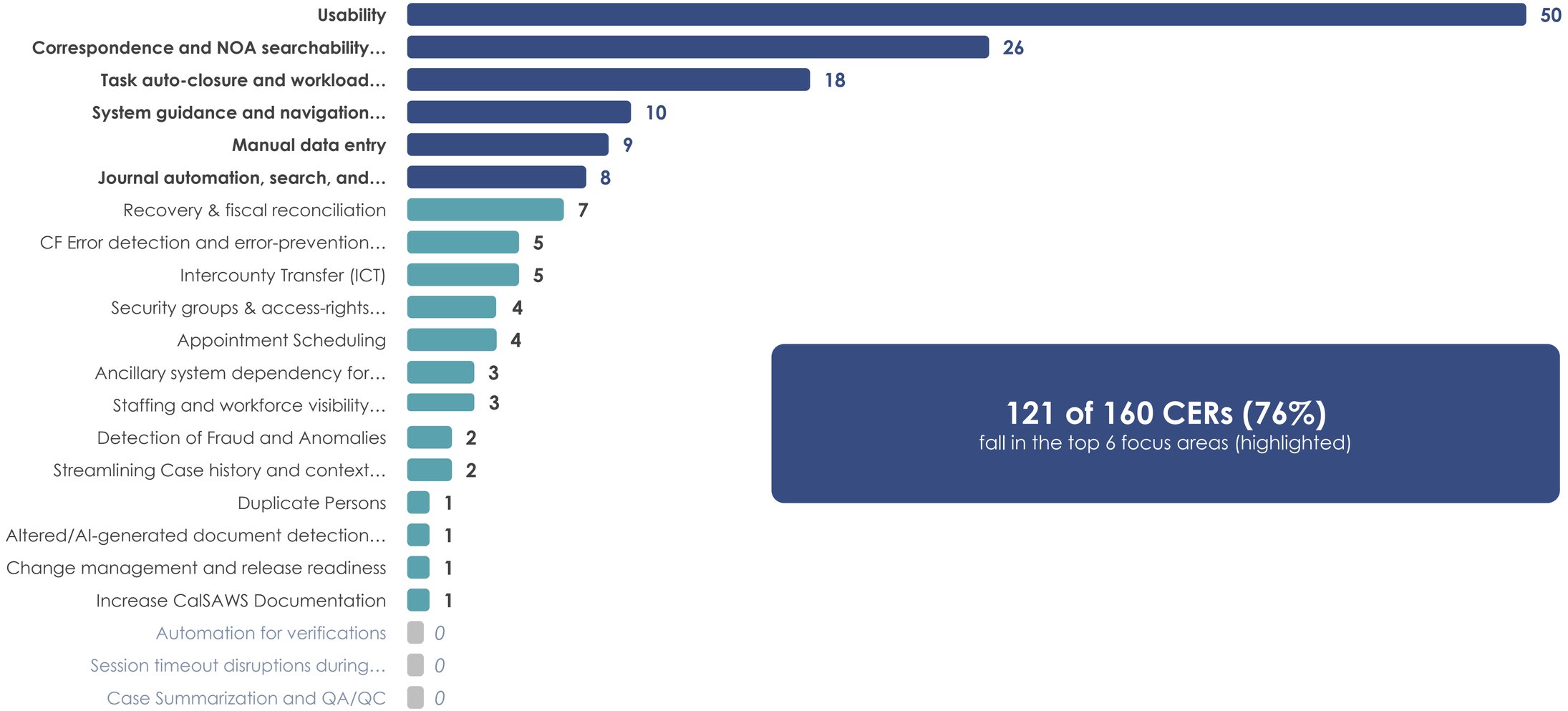
SCR to Focus Area Mapping

160 CERs-originated SCRs Reviewed

160 Mapped to a Focus Area (100%)

22 Focus Area Themes Identified

29 Counties Represented in CERs



121 of 160 CERs (76%)
fall in the top 6 focus areas (highlighted)

Where the 160 SCRs Stand

160 SCRs in total

7 In Flight + 2 SCERFRA/SIRFRA + 26 To Be Addressed Holistically + 2 Rescinded + 123 Remaining

7 In Flight
Prioritized and assigned to a release

CA-284868
Update Other Program Assistance (OPA) Detail Page to Trigger Elderly and/or Disabled Status for CalFresh for IHSS recipients with 2K, 2L, and 2M Aid Codes

CA-286640
San Francisco and Santa Cruz: Add Pay Codes for Incentive Issuances

CA-272229
Add a Back Out button for Foster Care Abatement Transaction

CA-288676
Create Annual Clothing Allowance Exceptions List or Report

CA-286636
Add Delivery Method Options on Auxiliary Page

CA-272271
Automate Overpayment Adjustments for AAP and KG Recovery Accounts

CA-282887
Allow Manual Overpayment Adjustments to Issue in Batch

2 SCERFRA/SIRFRA
Items tracked under SCERFRA/SIRFRA

CA-269787
Create Interface for Social Security Administration Income and Quarters

CA-269789
Interface of Employment Development Department Income and Quarters into CalSAWS

26 To Be Addressed Holistically
Journals and task SCRs

18 Task auto-closure and workload dashboards

8 Journal automation, search, and summarization

26 SCRs in total, matching the focus areas

123 To Be Prioritized

123 of 160 SCRs remain

CA-276133 and CA-275794 were rescinded.

These are all SCRs not called out in the first three buckets and the two rejected (160 – 7 – 2 – 26 – 2 = 123).

Highest-Scoring SCRs by SPG Score

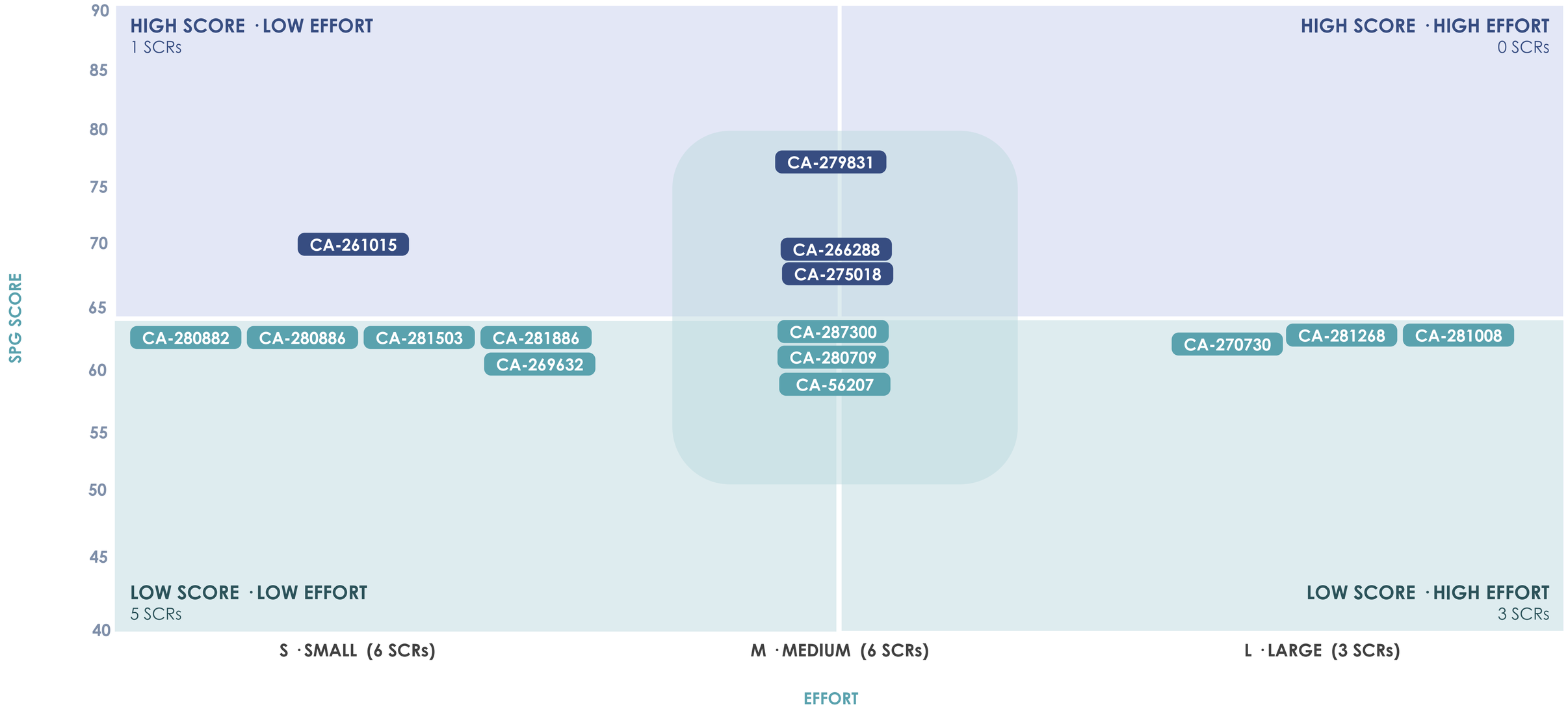
76 Highest SPG Score out of all 123 SCRs

15 Top-scoring SCRs (SPG 63–76)

5 Focus area in the top 15 SCRs

RANK	SCR #	SUMMARY	SCR FOCUS AREA MAPPING	SPG SCORE
1	CA-279831	Change to the Applicant IEVS Request Date at RE	Usability	76
2	CA-261015	Generate MC Denial NOA for FTP Income Verification	Correspondence and NOA searchability and automation	70
3	CA-266288	Allow Generation of Medi-Cal RE packets with Future Begin Date	Correspondence and NOA searchability and automation	68
3	CA-275018	Update to the Refund process to separate duties	Recovery & fiscal reconciliation	68
5	CA-269632	Prevent NOAs for the ICAMA Medi-Cal cases at Reassessment	Correspondence and NOA searchability and automation	65
6	CA-280882	Update Use of Office Address and ICTs	Correspondence and NOA searchability and automation	64
6	CA-287300	Send Request Case Update "Yes" After MAGI Case Linking	Usability	64
6	CA-281268	Route CalHEERS Referrals and Determination Changes to different pages	Usability	64
6	CA-280709	Allow for Selection/Deselection of Associated People When Sending ICT	Intercounty Transfer (ICT)	64
6	CA-280886	Allow Edit Worker Information for Outgoing ICT	Intercounty Transfer (ICT)	64
6	CA-281886	Outgoing ICT should allow MAGI Case Members to be included	Intercounty Transfer (ICT)	64
6	CA-281008	Display Reports Status on Customer Reporting List for ICT	Intercounty Transfer (ICT)	64
6	CA-281503	Allow Initiation of Outbound ICT with a Future Beginning Date of Aid	Intercounty Transfer (ICT)	64
14	CA-270730	Update KG Functionality to include Successor Guardian	Usability	63
14	CA-56207	Update Expense Detail data model	CF Error detection and error-prevention guardrails	63

SPG Score vs. Effort



Prioritized SCRs by SPG Score and Effort

HIGH SCORE (65-90) | LOW EFFORT
1 SCR

CA-261015 Generate MC Denial NOA for FTP Income Verification

HIGH SCORE (65-90) | MEDIUM EFFORT
3 SCRs

CA-279831 Change to the Applicant IEVS Request Date at RE

CA-266288 Allow Generation of Medi-Cal RE packets with Future Begin Date

CA-275018 Update to the Refund process to separate duties

HIGH SCORE (65-90) | HIGH EFFORT
0 SCRs

No SCRs in this quadrant

LOW SCORE (40-64) | LOW EFFORT
5 SCRs

CA-269632 Prevent NOAs for the ICAMA Medi-Cal cases at Reassessment

CA-280882 Update Use of Office Address and ICTs

CA-280886 Allow Edit Worker Information for Outgoing ICT

CA-281503 Allow Initiation of Outbound ICT with a Future Beginning Date of Aid

CA-281886 Outgoing ICT should allow MAGI Case Members to be included

LOW SCORE (40-64) | MEDIUM EFFORT
3 SCRs

CA-287300 Send Request Case Update "Yes" After MAGI Case Linking

CA-280709 Allow for Selection/Deselection of Associated People When Sending ICT

CA-56207 Update Expense Detail data model

LOW SCORE (40-64) | HIGH EFFORT
3 SCRs

CA-270730 Update KG Functionality to include Successor Guardian

CA-281268 Route CalHEERS Referrals and Determination Changes to different pages

CA-281008 Display Reports Status on Customer Reporting List of ICT

Project Recommendations: Low-Effort Items First

1 Immediate Priority
High score | Low effort

Picked up immediately in the next available release that has capacity.

CA-261015 Generate MC Denial NOA for FTP Income Verification
Correspondence and NOA searchability and automation | SPG 70

2 Next Focus
Low score | Low effort

Focus on the remaining low-effort items. Potential releases will be identified for each of these SCRs.

CA-269632 Prevent NOAs for the ICAMA Medi-Cal cases at Reassessment
Correspondence and NOA searchability and automation | SPG 65

CA-280882 Update Use of Office Address and ICTs
Correspondence and NOA searchability and automation | SPG 64

CA-280886 Allow Edit Worker Information for Outgoing ICT
Intercounty Transfer (ICT) | SPG 64

CA-281503 Generate MC Denial NOA for FTP Income Verification
Intercounty Transfer (ICT) | SPG 64

CA-281886 Outgoing ICT should allow MAGI Case Members to be included
Intercounty Transfer (ICT) | SPG 64

Next Steps

- PSC to evaluate the SCR list and determine the following:
  - If the SPG score aligns with the respective county's impact assessment
  - Determine whether the SCR remains a valid and current priority and should continue to be pursued, or whether it should be formally closed
- Project to identify target releases for the SCRs prioritized by PSC
- Project to prepare an updated list to include newly created SCRs originating from CERs for PSC review next month



Innovation Update

The Quarterly Cadence

Both Proof-of-Concept ideas are now in the Validate stage

1. Set Theme
2. Submit Ideas
3. Score & Prioritize
4. **Validate**
5. Review Results
6. Approve & Advance

- On October 7, the Innovation Panel approved both ideas to advance. Both are now in Validate, being built as working prototypes.
- Both ideas give a status update to the Innovation Panel on November 4.
- The team's AI-assisted development pipeline (AI DLC) is accelerating the build. More on that later today.

Pre-EDBC Hard Stop/Risk Checkpoint

Catches likely errors before EDBC finishes, not after benefits go out

How it Works

- Builds on the Nudge framework, already live in five Region 4 counties
- Workers acknowledge each flag as Corrected, Not an error, or Will follow up
- Nothing blocks EDBC or delays benefit issuance

The Seven Checks

1. Unbudgeted interface income
2. IHSS income mismatch
3. Unverified earned income
4. Outdated shelter deduction
5. Unsupported utility allowance
6. Expenses exceed reported income
7. Unresolved task or MEDS alert

Why it matters: California's CalFresh payment error rate was 10.93% in FY2025. Above 10%, H.R. 1 shifts a 15% share of benefit costs to the state, roughly $2B a year.

Journaling & Interview Standardization

One proof of concept, delivered in two phases

PHASE 1 · BEFORE THE INTERVIEW

Case scan

A side panel lists 3 to 5 case-specific questions to ask, not a generic script.

PHASE 1 · DURING

Real-time flags

When the client says something that conflicts with the case file, the matching item flags.

PHASE 1 · AFTER

Journal draft

Guided navigation to a pre-filled journal entry in standard wording. The worker accepts or edits it.

Phase 2, later: extends the same approach to income change, address change and recertification journals.

Workers stay in control: they lead every interview and confirm every entry. Nothing saves automatically.

What the Proof of Concept Will Validate

Each idea has a clear test and a clear definition of success

#1 Pre-EDBC Checkpoint

The test

Whether the seven checks catch likely errors before EDBC finishes, and whether workers can act on them quickly.

SUCCESS LOOKS LIKE

- Checks run on synthetic cases, reviewed by Orange and Contra Costa counties
- Two months of real production data scanned against the seven checks, showing how many cases would have been caught
- No added delay to benefit issuance

#2 Journaling & Interview

The test

Two questions: does a pre-interview checklist reduce worker errors, and can the post-interview journal update complete with fewer errors?

SUCCESS LOOKS LIKE

- Workers review and confirm every entry before it is saved
- More complete questions asked, with less time spent moving between screens and notes

The Path Forward

Results return to PSC and JPA once validated

#1 Pre-EDBC Checkpoint

Proof of Concept
Now. Tested with design-partner counties.

Pilot
Short, limited trial if results support it

JPA PSC Approval Funding Roadmap

SCR
Standard SCR process with PSC prioritization

Statewide rollout
Released through the normal process

#2 Journaling & Interview

Phase 1 Proof of Concept
Now. Interview checklist and journal draft

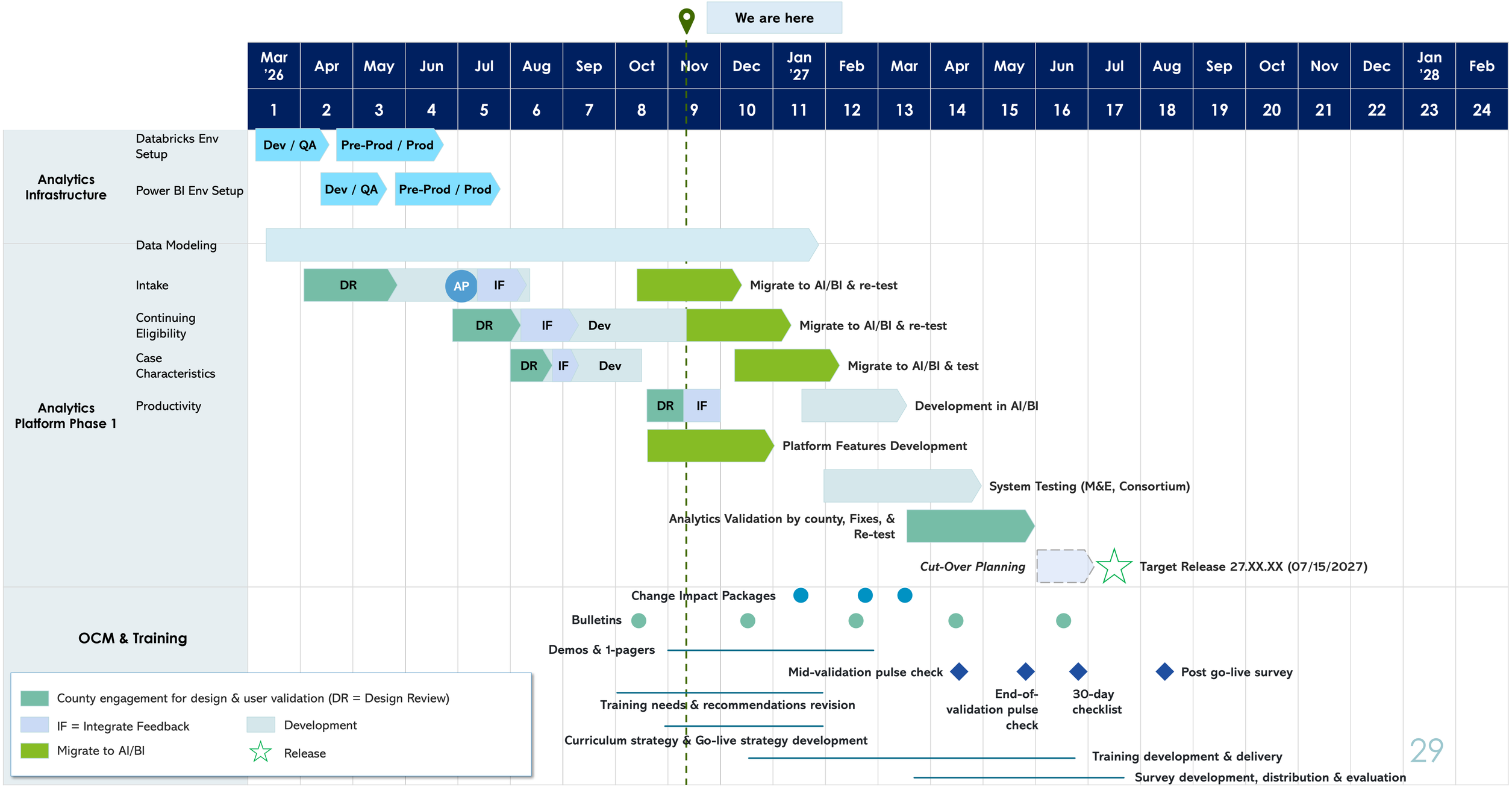
JPA PSC Approval Funding Roadmap

SCR
Standard SCR process with PSC prioritization + exploration of remaining journal triggers

County input: alongside the Pilot, a work group brings the shared rule catalog to all 58 counties for sign-off.

Analytics Update

Phase 1, 2 & 3 Execution Timeline: March ’26 – Feb ’28



Subject Area – Sprint Status

Highlights Since Last JPA:

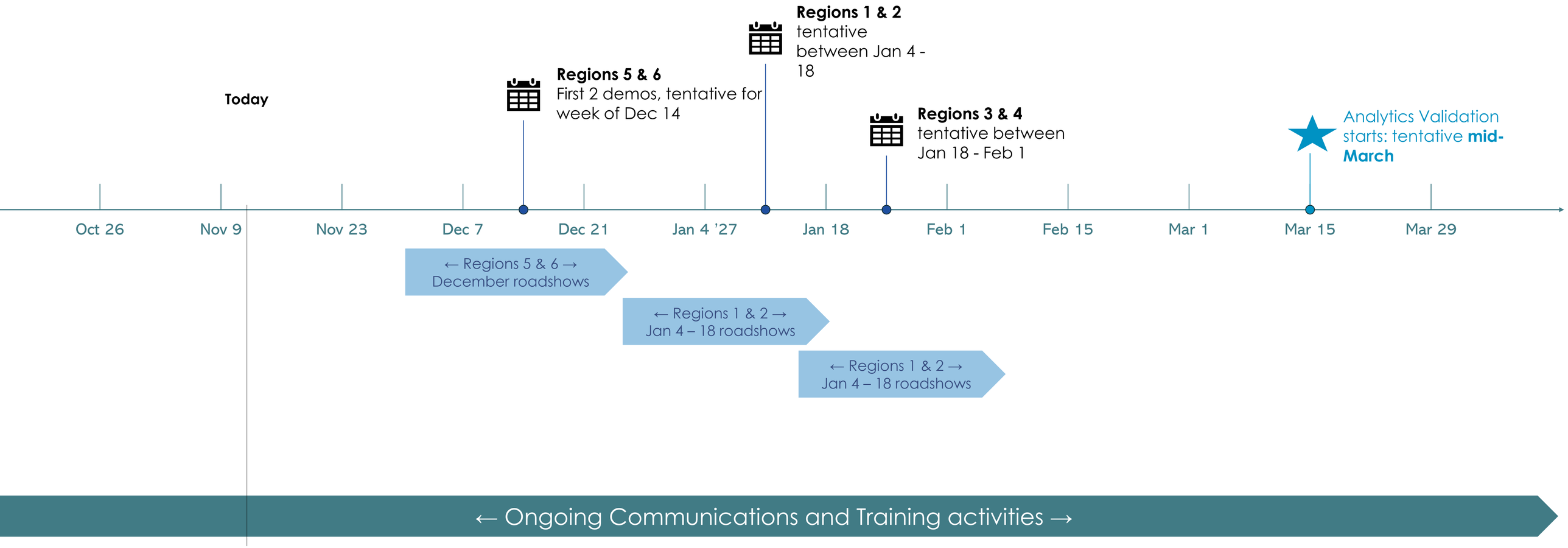
- Design & Development* for the **Case Characteristics** is **100% complete**
- Design for **Productivity** is in progress
- **Migration** for **Intake module** dashboards **to AI/BI** has started

Domain	Sprint	Status
Intake	Design/Development/Test	100% Complete
	County Preview	100% Complete
	Migration to AI/BI	42% Complete
Continuing Eligibility	Design/Development/Test	100% Complete
Case Characteristics	Design	100% Complete
	Development	100% Complete
Productivity	Design	95% Complete

** Development for Intake, Continuing Eligibility, and Case Characteristics modules were completed in PowerBI. Migration to AI/BI has started for the first module (Intake)*

Analytics Modernization Roadshow

County sessions on AI/BI dashboards, and report building



Analytics Action Items

Action Item	Owners	Due	Status
Determine the number of pixel perfect reports in CalSAWS that are used across counties and assess the overall business impact.	Rajesh Tahaliyani	November 2026	Update – 58 Reports

BenefitsCal Update

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

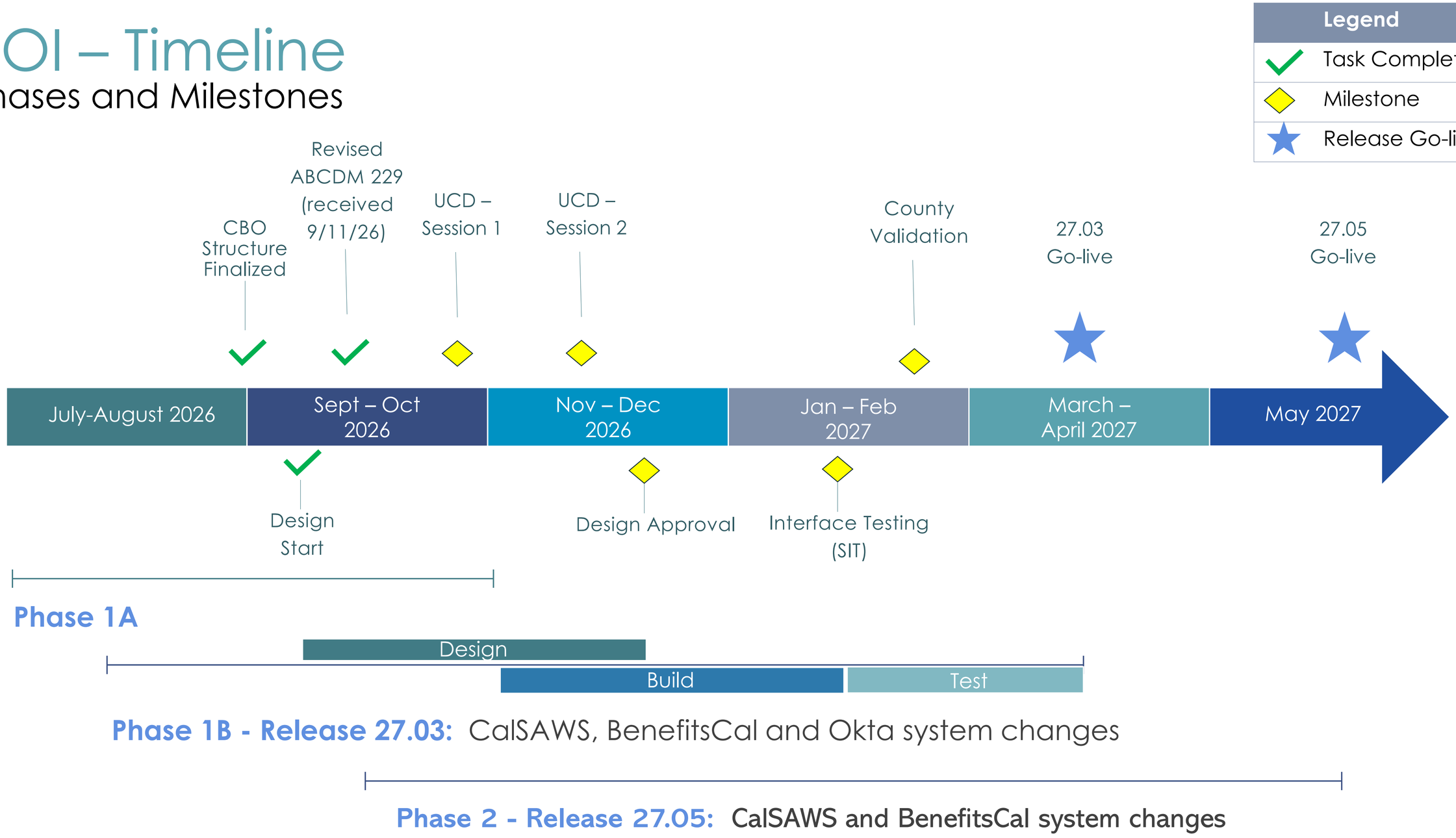
Phase 2

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

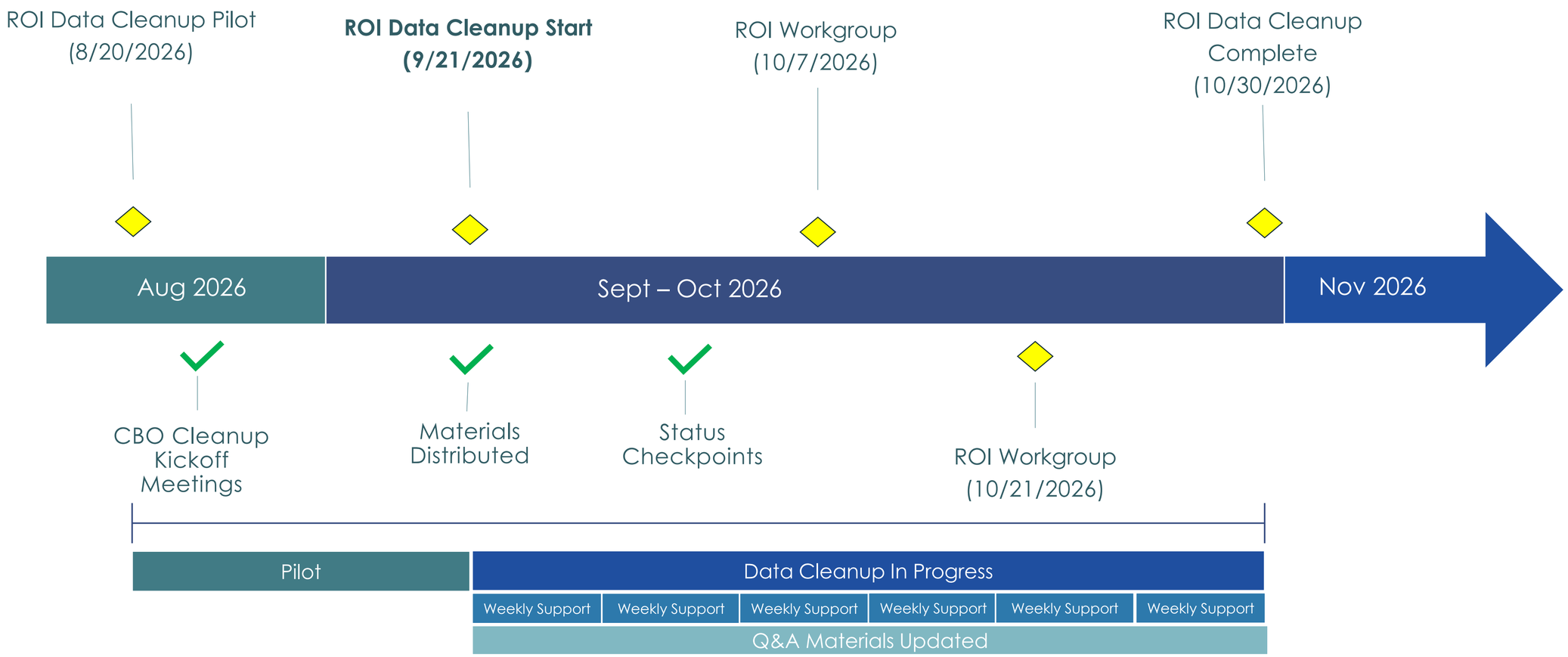
Phases and Milestones



ROI – Timeline

CBO Data Cleanup Activities

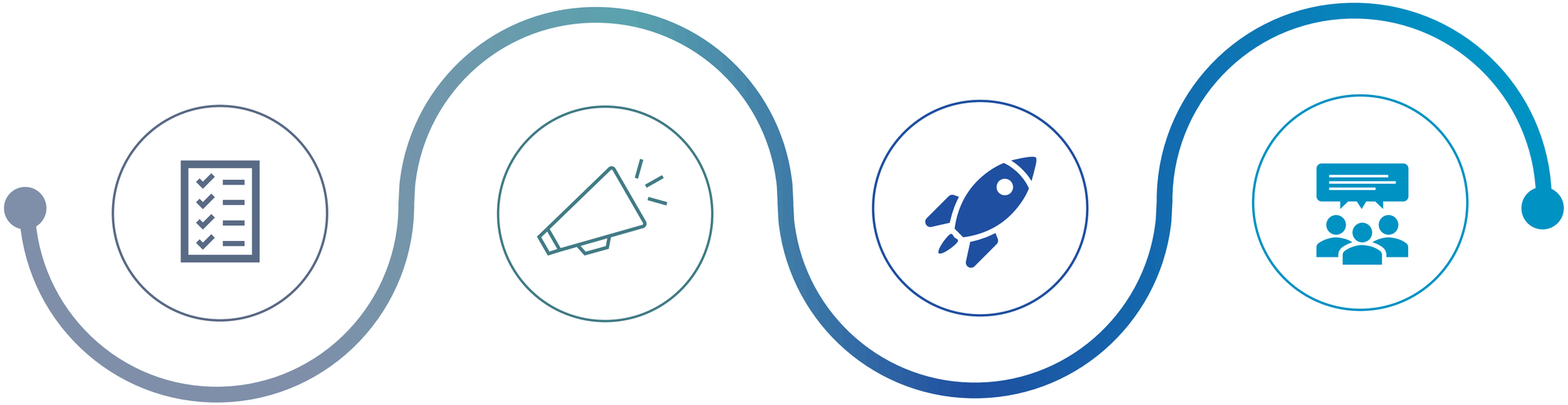
Legend	
✓	Task Complete
◆	Milestone
★	Release Go-live



Release and Policy Update

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

November

Priority Releases
32 SCRs ~4.8k hrs.

11/12/2026:

- Enhancements to the CF-296 State report (CA-293235)

11/XX/2026:

- 2027 CAPI COLA Values (CA-290706)
- Update 2027 CalSAWS Batch Calendar (CA-295181)
- 2027 MEDS Renewal, Recon Schedule, RE Packets and Release dates (CA-295179)

December

Priority Releases
30 SCRs ~13k hrs.

12/06/2026:

- 2027 Social Security COLA Values (CA-301061)

12/12/2026:

- 2027 Social Security COLA Batch EDBC Run (CA-301062)

12/XX/2026:

- 2027 CAPI COLA Batch EDBC Run (CA-290707)
- 2027 State Minimum Wage Values (CA-290458)
- 2027 State Minimum Wage Batch EDBC Run (CA-290456)

January

Priority Releases
16 SCRs ~4.1k hrs.

01/07/2027:

- 2027 COLA Values for SSI - In-Bound File from MEDS (CA-290485)

01/09/2027:

- Batch EDBC for 2027 CalFresh SSI COLA (CA-290486)

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

Medi-Cal 2025-26 State Budget Policy Roadmap*

In Progress ★ Target Go-Live / Release Version

** Target releases are subject to change.*

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

WE ARE HERE

**Target releases are subject to change.*

Medi-Cal HR-1 Policy Roadmap

In Progress ★ Target Go-Live / Release Version

** Target releases are subject to change.*

System Change Requests	Policy Effective Date	Sep 2026	Oct 2026	Nov 2026	Dec 2026	Jan 2027	Feb 2027
CA-286076 – NCOA: Update the Address Prior to Mailing When an Address Change is Reported by a Third Party	1/1/2027	Development	Test	26.11 ★			
CA-294490 - Automated Discontinuance Process for PARIS and RVP Matches	1/1/2027	Development	Test	26.11 ★			
CA-298078 - Update the DHCS Reports with H.R.1 Updates	1/1/2027	Development	Test	26.11 ★			
CA-299032 – Update Management Reports with H.R. 1 Changes	1/1/2027	Development	Test	26.11 ★			
CA-296138 – Add Updated Medi-Cal Forms to Template Repository	1/1/2027	Development	Test	26.11 ★			
CA-300884 – H.R.1 Work and Community Engagement Requirements for New Adult Group Part II	1/1/2027	Design		Development		Test	27.02 ★
CA-287689/CSPM-84620 - H.R.1 Pregnancy / Postpartum Enhancements & Six-Month Redeterminations Part II	1/1/2027	Design		Development		Test	27.02 ★
CA-301329 - H.R.1 Income Data Collection Retrieved from Truv for MAGI Medi-Cal	1/1/2027	Design		Development		Test	27.02 ★
CA-301602 - eHIT: Expansion of Equifax Incarceration and Release Data Elements	1/1/2027	Design		Development		Test	27.02 ★

WE ARE HERE

Medi-Cal HR-1 Policy Roadmap

In Progress ★ Target Go-Live / Release Version

** Target releases are subject to change.*

System Change Requests	Policy Effective Date	Sep 2026	Oct 2026	Nov 2026	Dec 2026	Jan 2027	Feb 2027	Mar 2027	Apr 2027	May 2027	Jun 2027	Jul 2027	Aug 2027	Sep 2027	Oct 2027	Nov 2027	TBD
CA-293006 – Deceased Member Verification	1/1/2027	Design			Development		Test	27.03 ★									
CA-303824 – H.R.1 Work and Community Engagement Requirements - Phase 4	1/1/2027			Design			Development			Test	27.06 ★						
CA-293024 - National Database for Duplicate Aid Verification	10/1/2029								Design			Development			Test	27.11	
CA-293433/CSPM-81631 - Cost Sharing for Expansion Adults	10/1/2028																TBD
CA-303191 – Automation of Updated MCP Member Address	10/1/2028																TBD

WE ARE HERE

MC HR 1 and Premiums Risks

Project Watch Items

Risk 326

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

Risk 347

- CalSAWS and CalHEERS integrated test in progress.
- Risk opened

Risk 326
Lack of timely policy guidance may impact Medi-Cal H.R. 1 delivery schedule

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

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

Risk 347
Lack of timely policy guidance and vendor interface delivery may impact Medi-Cal HR1 Premiums functionality

Risk: IF final policy guidance and DHCS Medi-Cal Premiums vendor interface delivery does not meet the 27.06 SDLC timelines, THEN the CalSAWS system delivery may be delayed.

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

CalFresh/CalWORKs HR 1 and Policy Updates*

In Progress

★ Target Go-Live / Release Version

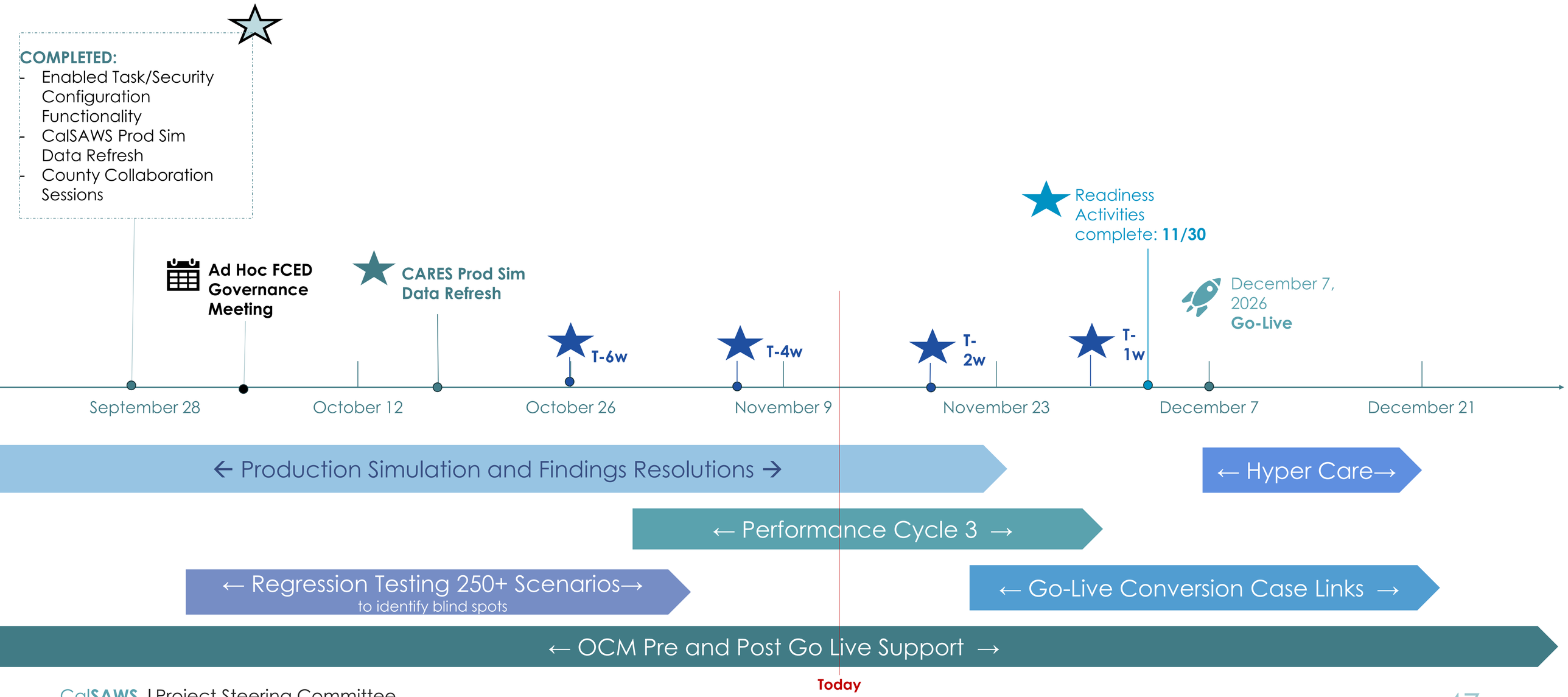
** Target releases are subject to change.*

System Change Requests	Policy Effective Date	Nov 02026	Dec 2026	Jan 2027	Feb 2027	Mar 2027	Apr 2027	May 2027	Jun 2027	Jul 2027
CA-298517/CSPM-83660 - Truv Income Verification Integration Phase 2a (Off-State)	12/31/2026	Test 26.11 ★								
CA-299535 - ABAWD Discretionary Exemption Tracking – Long Term Solution	11/1/2026	Develop ment	Test 27.01 ★							
CA-302266/CSPM-83660 - Truv Income Verification Integration Phase 2b (On-State)	12/31/2026	Develop ment	Test 27.01				★			
CA-300464/CSPM-85976 - Work Number Integration – Phase 2 - Prevent EDBC processing until report is verified by a worker.	3/1/2027	Development			Test 27.03		★			
CA-303538/CSPM-85165-ACL 26-55 Extension of Eligibility for RCA/TCVAP Programs	10/1/2026	Pending Approval	Development		Test 27.03		★			
CA-299026/CSPM-84656 – Truv Income Verification Integration Phase 3	3/1/2027	Design			Development		Test 27.05		★	
CA-288562 - CFAP Expansion Phase 1	10/01/2027	Test			Development				Test 27.07	★

WE ARE HERE

FCED Update

CalSAWS Activity Timeline



Go-Live Readiness Categories

Four readiness criteria must be complete ahead of the December 7, 2026, go-live.

1

Case Pre-linking

95%
complete

ETA for completion
11/20/2026

2

Design, Development and Testing

95%
complete

ETA for completion
11/23/2026

3

Performance & Operations

85%
complete

ETA for completion
11/30/2026

4

Operational Change Management (OCM)

90%
complete

ETA for completion
11/30/2026

All four criteria complete by 11/30/2026 | Go-Live December 7, 2026

Case Pre-Linking

95%
of case-linking activities complete so far

FCED Case Pre-Linking activities remain actively underway, with ongoing case-linking for 9/20 production data with CARES data. The focus is on minimizing the volume of unlinked case at go-live.

Case Pre-Linking Activities – Completed

Case link cycle-1 (May 2026)
Case-link rates of **91%-97%** across FC, AAP, and KG programs established.

Case link cycle 2 (October 2026)
Case-link rates of **95%-99%** across FC, AAP, and KG programs established.

Establish Go-Live Case-Link Timeline with CARES
Finalize case linking timelines and milestones for go-live by.

Case Pre-Linking Activities - In Progress (11/30)

CRFI for cycle 2 residual cases
County identification of cases that could not be linked systematically to include at go-live. Response requested by 11/11.

Design, Development, and Testing

95%
of activities complete so far

Majority of FCED functionally was made available start of production simulation. Ongoing activities include delivery of new changes, resolving defects that impact county workload.

County Support, Design, Development, Testing - Complete

Additional Changes Prioritized
11 identified; 3 prioritized for the 12/7 release and 8 deferred with approved workarounds.

County Collaboration Session Complete
10 CARES observations across LA and Stanislaus sessions. LA issues addressed by CARES.

Findings Impacting Workload - Resolved
AAP name issue ; historical-data impacts being addressed by CARES for 10/19.

Development Testing – In Progress (11/20)

Support CARES defect fixes
Support CARES defect retests coming out of county collaboration sessions.

Deliver Change Requests
All functionalities delivered. Complete system testing for functionalities by **11/17.**

Production Simulation Support
Support Production Simulation Defects Resolution through **11/20**.

Performance & Operations

85%
of activities complete so far

FCED PERF and Operational Readiness activities are underway with a focus on system stability and postproduction operational handling of system monitoring and downtime scenarios.

PERF and Operational Readiness – Completed

Performance Cycle 1 & 2
Integrated perf cycles completed between CARES and CalSAWS in April and June

Operational Readiness
Error handling mechanisms, system health check and supporting go-live operational reports established.

PERF and Operational Readiness – In Progress (11/15)

Performance Cycle 3
Execute cycle 3 (isolated) ; review and finalize results with partner and consortium.

Application Downtime Communication
Establish communications protocol for planned and unplanned downtimes between CARES and CalSAWS.

Go-Live Planning and Operational Reports
Finalize CalSAWS implementation / roll back plan ; establish supporting go-live operational reports.

OCM Activities

90%

of OCM activities complete so far

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

OCM Activities – Completed

Resource Materials
Job Aids, WBTs, Quick Guides, and Online Help Pages delivered to counties.

Communications
September readiness bulletin issued to counties. Go-Live Readiness Checklist and Go-Live Resource Hub (one-stop shop) targeted for October.

System Demonstrations
Initial demo series completed; county feedback gathered via survey.

Pre-Go-Live Security & Task Office Hours
Launched 10/1 – bi-weekly, Thursdays 11am–12pm, for FCED Security & Task Set-Up support.

OCM Activities – In Planning (with CARES)

Escalation & Mitigation Plan
Defining critical POCs, hand-off/tracking mechanisms, and downtime protocols with CARES.

Joint Support, Incident Triage
CARES availability during CalSAWS office hours, daily issue-log communication to counties, daily CARES issue hand offs

Post-Go-Live Office Hours (Hypercare)
Daily for 1–2 weeks after go-live; issue-resolution support. (Plan published with Nov bulletin)

County Instructions for interim actions
Provide County workload resolution instruction by **11/30.** (Resource Mismatch scenarios, Residuals for case linking, 8 change requests interim actions)

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.

Risk Posture: Trending Down; **ETA to close:** 11/20 (after prod sim)

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 Posture: Remains Same; **ETA to Close:** 11/20 (final cycle before Go-live)

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.

Risk Posture: Trending Down; **ETA to close:** 11/20 (after prod sim)

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 Posture: Remains Same; **ETA to Close:** 11/20 (after prod sim close out)

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.

Risk Posture: Remains Same; **ETA to Close:** TBD (post 12/7 go-live)

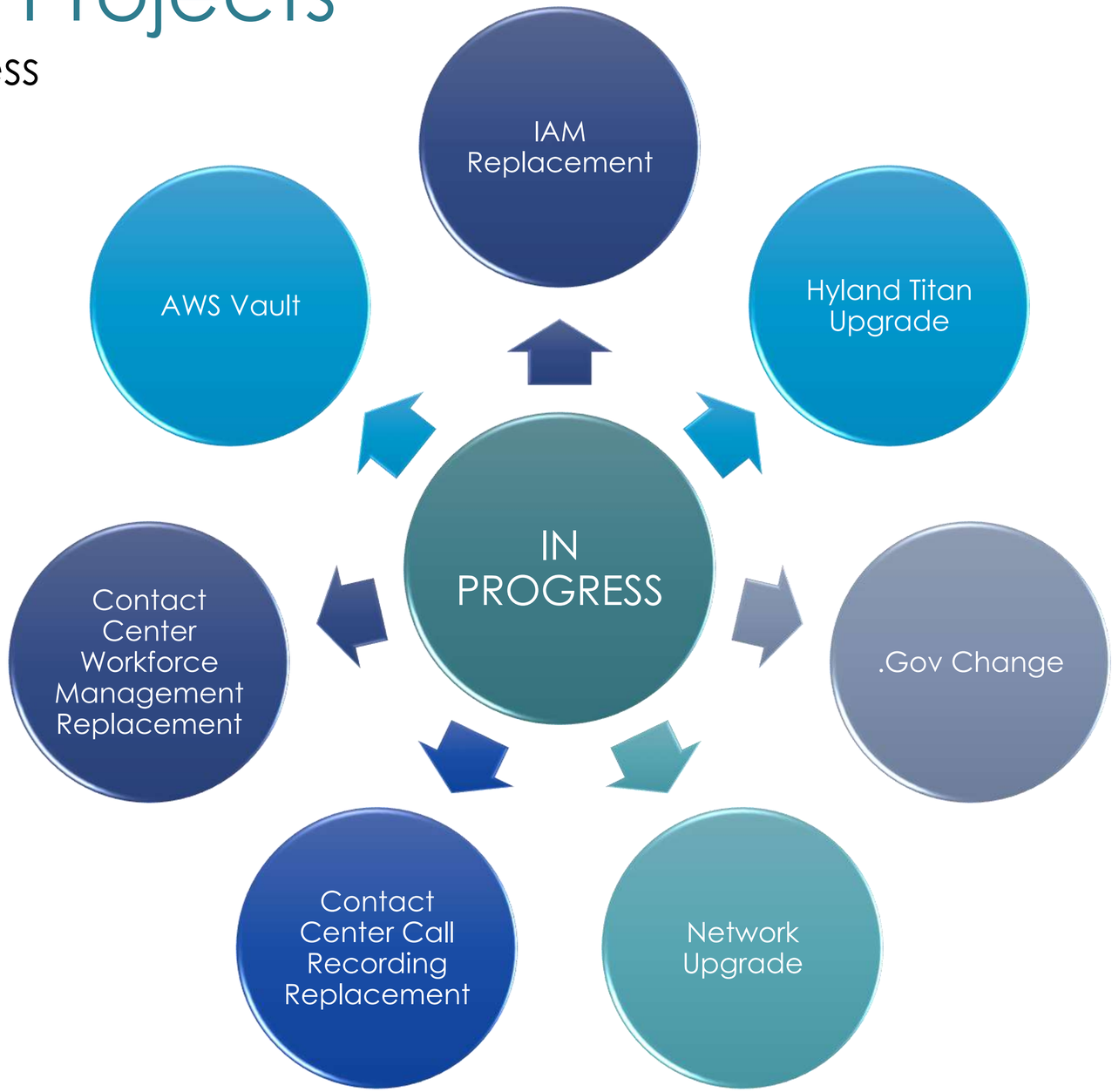
Infrastructure and Contact Center Update



Infrastructure Projects

Infrastructure Projects

Large Projects in Progress



Infrastructure Projects

IAM Replacement



CalSAWS Interface Partners

Dec 2026

- Last ForgeRock Login
  Saturday, Dec 12, 2026
- Migrate User IDs and County Verification
  Sunday, Dec 13, 2026
- CalSAWS Users Live
  Monday, Dec 14, 2026

BenefitsCal CARES Interface

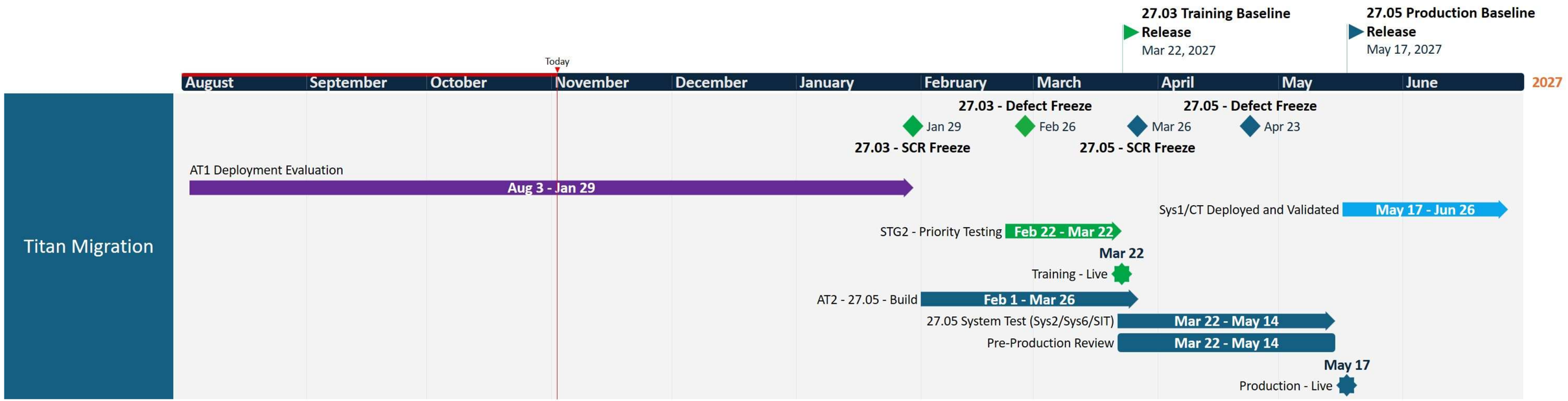
Jan 2027

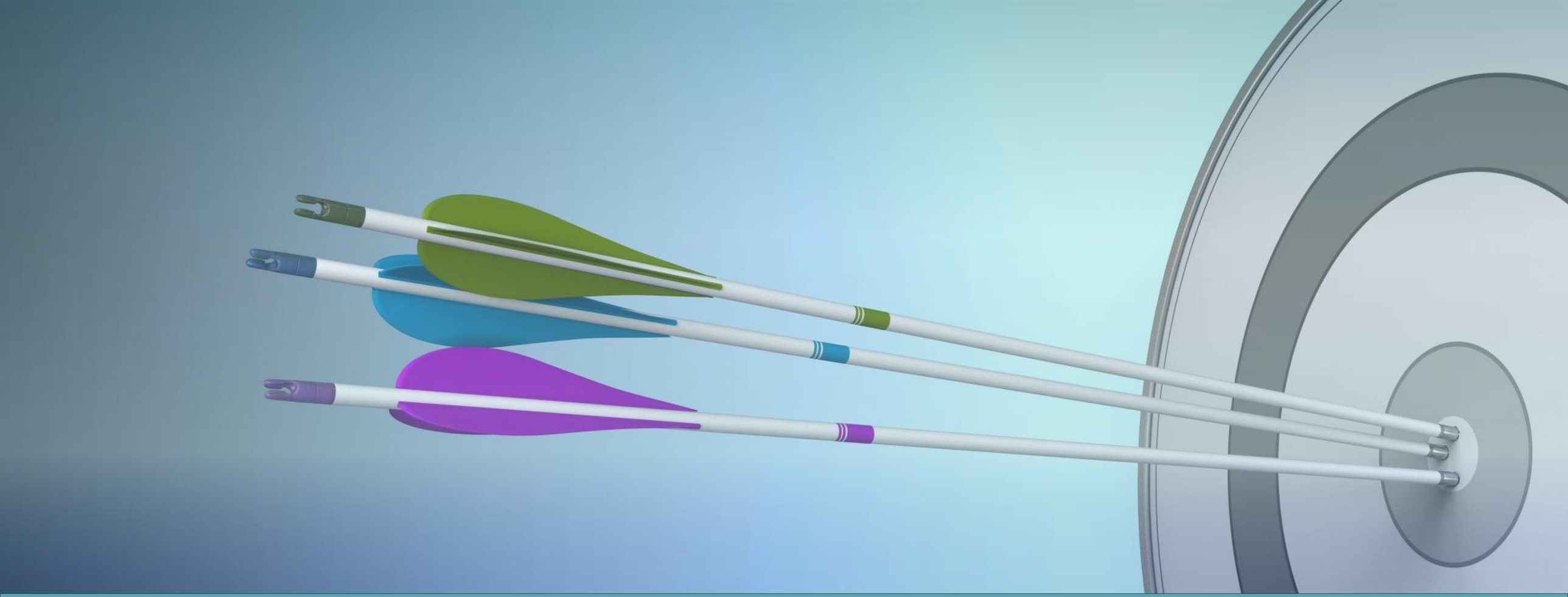
- Last ForgeRock Login
  Saturday, Jan 9, 2027
- Migrate User ID and Verification
  Sunday, Jan 10, 2027
- BenefitsCal Users Live
  Monday, Jan 11, 2027

Infrastructure Projects

Hyland Titan

Hyland Titan Upgrade





Contact Center

Contact Center – Call Summarization

Rollout Groups

Group 1 (Complete)	Group 2 (Complete)	Group 3 (In Progress)	Group 4 (Dec-Feb)

• Contra Costa
• Orange
• Marin
• San Mateo
• Monterey
• Santa Clara
• Santa Cruz
• Sacramento
• San Francisco
• Solano
	• Fresno
	• Stanislaus
	• Kern
	• Kings
	• San Bernardino
	• San Luis Obispo
	• Santa Barbara
	• Ventura
		• Sonoma
		• Yolo
		• Sutter
		• Tulare
		• Yuba
		
		• Up Next
		  • Butte
		  • Humboldt
		  • Shasta
			• Alameda
			• Merced
			• Riverside
			• San Diego
			• Los Angeles

Metrics Since Launch

Results from April 10th to Oct 31st – 20 Counties in the Metrics – 23 Counties Live

Key Performance Metrics

Since Launch
4/10/26 Forward

575,175	3.89	100%
Summaries Generated Since Launch	Avg Generation Time (Seconds)	% Generated within 60 seconds

Percentage Time Reduction

20%	13%
Reduction in ACW	Reduction in AHT

Percentage of Content Unedited

84.41%
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

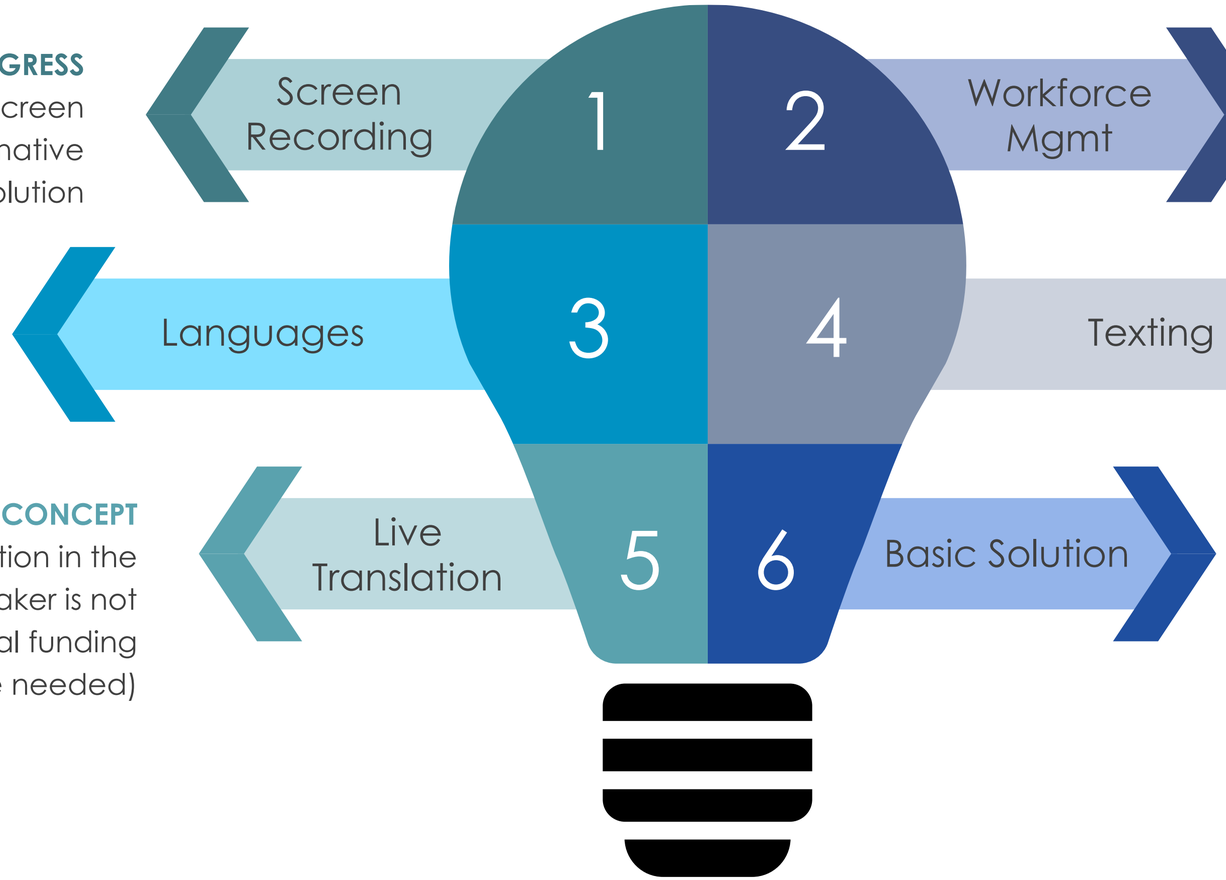
Contact Center

What's Next

IN PROGRESS
Replace current screen recording with AWS native solution

PENDING PRIORITIZATION
Add additional languages to call summarization

PROOF OF CONCEPT
Incorporate live translation in the event a native speaker is not available (Additional funding would be needed)



IN PROGRESS
Replace current workforce management solution eliminating individual Calabrio licenses

PILOT
Provide texting options related to customer callback updates (County purchase for Counties opting in)

RESEARCH
Offer a basic contact center solution that is a more viable option for some Counties (County purchase for Counties opting in)

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

October CLE - Maximizing CalSAWS for Successful Medi-Cal Renewals

The October CalSAWS Learning Exchange was held on October 28–29, 2026 and focused on Maximizing CalSAWS for Successful Medi-Cal Renewals. The CLE provided county staff with a practical overview of the Medi-Cal renewal process in CalSAWS, including automated processing, worker intervention, renewal exceptions, reports and resources available to support renewal monitoring and follow up.

- **1202 participants** joined across the two CLEs
- **51counties** were represented
- State partners were also invited to participate in CLE sessions.

Path to the CalSAWS Learning Exchange session materials will be included upon completion of the session.

All CLEs are stored here:

Communication Portal > Communication & Resources > CalSAWS Learning Exchange > Click desired CLE session

CalSAWS Learning Exchange Sessions

Maximizing CalSAWS for Successful Medi-Cal Renewals – CLE Feedback

"More hands-on practice or scenario-based walkthroughs would help deepen understanding and build confidence."

"The flow charts were very helpful and appreciated."

"The information was dense but so vital. Going a bit slower would be helpful, the workflows are amazing!"

"Great information. The information presented on pulling reports will be especially useful."



"Having the slides before the presentation would help."

CalSAWS Learning Exchange Sessions

CLE Planning Schedule **2026 - 2027**

March 2026-
Delegated Administrators*
Completed!
Sessions:
3/17/26
3/18/26

March 2026- CDSS Presenting on CF Payment Error Rate (PER)
Completed!
Session:
3/24/26

February 2026-
Communication Portal
Completed!
Sessions:
2/17/26
2/18/26
2/19/26

April 2026- Collections
Completed!
Sessions:
4/29/26
4/30/26

June 2026 – Skipped Issuance
Completed
Sessions:
6/30/26
7/01/26
7/02/26

CalSAWS Conference:
June 25-26

August 2026 – No CLE

Sessions:
None Scheduled

October 2026 –
Maximizing CalSAWS for Successful Medi-Cal Redeterminations
Sessions:
10/28/26
10/29/26

December 2026 –
Delegated Admin Training for Okta
Sessions:
12/01/26
12/03/26

February 2027 –
RCM/WM/SME Overview
Sessions:
TBD
TBD

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.



1 2 3 4

State Partners Updates







State Partners Updates

Adjourn Meeting