JPA Board of Directors Meeting

November 20, 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 October 9, 2026, meeting of the JPA Board of Directors.
   b. Approval of Deloitte M&E Change Order 13, which includes one (1) County Purchase Order (CPO).
   c. Approval of Accenture Amendment 2, which includes Administrative Update to include language for County Purchase Orders.

Action Items

4. Approval of Consent Items:
   d. Approval of Gainwell infrastructure Change Order 13, which includes three (3) County Purchase Orders (CPOs).
   e. Approval of ClearBest Quality Assurance Work Order 4, which includes QA Project Management Services.
   f. Approval of RGS Amendment 45, which includes Administrative Updates for Benefits.
   g. Approval of Memorandum of Understanding (MOU) between CalSAWS and Child Welfare Digital Services (CWDS) Amendment 1, which updates signatory authority.

Action Items

5. Approval of Group Sales Agreement between CalSAWS Consortium and Monterey Plaza Hotel for the 2027 Strategic Planning Meeting April 28 – 30, 2027, and delegation of authority to CalSAWS Executive Director to sign Catering and A/V agreements in an amount not to exceed $100,000.

2027 Strategic Planning Meeting Location

Proposed for JPA Approval

Monterey
April 28 – 30, 2027







Informational Items

CalSAWS JPA Board Policy Manual Update

October 20, 2026 Meeting With State

- Discussed State's comments to draft Board Policy Manual.
- State's comments and CalSAWS' response set forth in Comments Log included in Board packet.
- Resulted in revisions to Manual.

Revisions Following Discussion With State

- Section IV.B.3 revised to reflect that State Representative may attend closed sessions of the Board, unless the Board Chair determines a conflict exists.
  - For example, discussion with Legal Counsel regarding pending litigation.
- Section VII.G.2 revised to reflect State personnel will be invited to CCB meetings as observers.
- Section VII.I.1 revised to reflect State personnel will be invited to BenefitsCal Advisory Group meetings as observers.

Additional Changes

- Additional clean up changes made per second round of comments from Directors. For example,
  - Clarification re references to “CalSAWS Consortium,” “CalSAWS” and “Consortium.”
  - Replace “citizen” with “public.”
  - Additional grammatical and punctuation issues addressed.

Next Steps

- Second meeting with State set for December 3 to address any additional comments.
- Final draft will be presented for final approval at December Board meeting.

Quarterly PMO Report

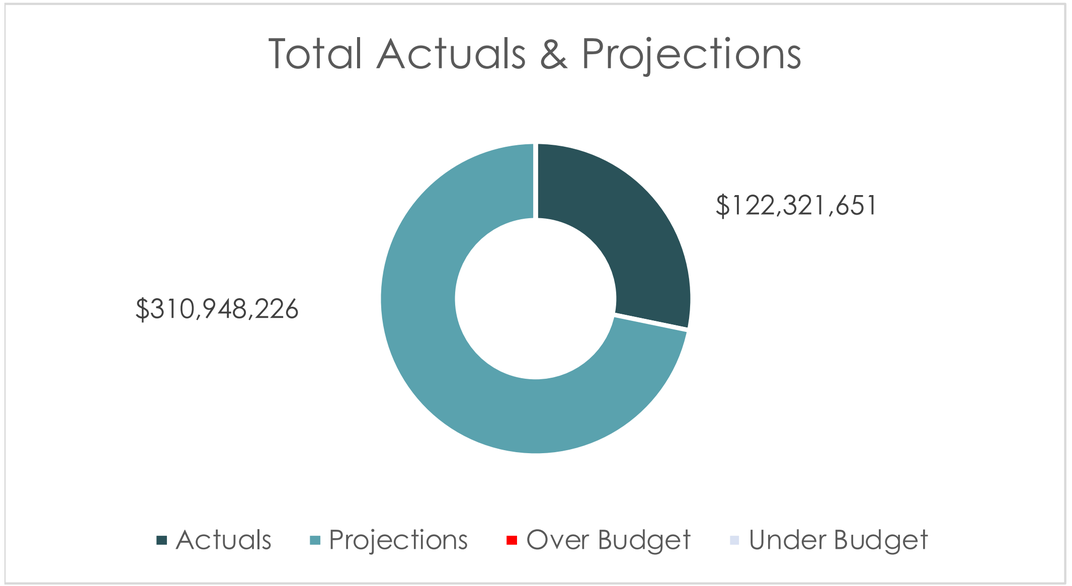
PMO Update

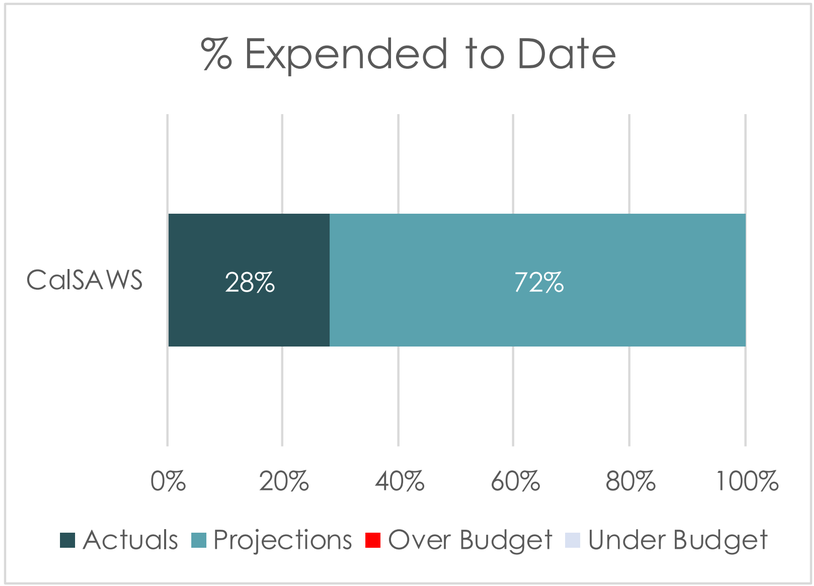
CalSAWS Financial Update

- CalSAWS M&O
- Premise
- JPA Admin

1. Actuals to Date
   Based on Vendor Invoices & County Claims
2. Projections (Estimates to Complete)
   Estimated Costs for Future Months
3. Estimate at Completion (EAC)
   Actual Costs Plus Estimated
4. Total Allocation/Budget
   Amount Allocated by Line Item for the Approved Budget
5. Balance
   Difference Between EAC and Budget
   Negative balance is over budget
   Positive balance is under budget
6. % Expended to Date (Actuals)
   Percent of Actuals to Date Divided by the Budget
7. % EAC to Budget
   Percent of EAC Divided by the Budget

CalSAWS | SFY 2026/27 FINANCIAL DASHBOARD - November 13, 2026





Category	Actuals to Date[1]	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget
CalSAWS	**$107,028,827**	**$241,216,249**	**$348,245,076**	**$348,245,076**	**$0**	**30.7%**	**100.0%**
CalSAWS M&O	$105,058,598	$239,542,903	$344,601,501	$344,601,501	$0	30.5%	100.0%
OCAT M&O	$128,640	$292,343	$420,983	$420,983	$0	30.6%	100.0%
CalHEERS Interface	$1,663,113	$1,294,434	$2,957,547	$2,957,547	$0	56.2%	100.0%
Covered CA CSC	$178,476	$86,569	$265,045	$265,045	$0	67.3%	100.0%
CalSAWS Premise	**$14,989,196**	**$69,249,138**	**$84,238,334**	**$84,238,334**	**$0**	**17.8%**	**100.0%**
CalSAWS Premise	$14,989,196	$69,249,138	$84,238,334	$84,238,334	$0	17.8%	100.0%
JPA Admin. Budget	**$303,628**	**$482,839**	**$786,467**	**$786,467**	**$0**	**38.6%**	**100.0%**
CalSAWS 58 Counties	$303,628	$482,839	$786,467	$786,467	$0	38.6%	100.0%
Total	**$122,321,651**	**$310,948,226**	**$433,269,877**	**$433,269,877**	**$0**	**28.2%**	**100.0%**

Note: Actuals are based on planned invoices through December (partial) payment month and September Claim Month.

PMO Update

Project Management Risk – Annual Funding

RISK 102 - LACK OF ANNUAL PROJECT FUNDING MAY CAUSE SCHEDULE DELAY OR REDUCTION IN SCOPE FOR CALSAWS & OTHER PROJECTS

Description	Mitigation Plan
The project is subject to state funding approval each year. State general fund payments may be deferred, or budget cuts may cause schedule delays, scope reductions, or staff reductions.	Consortium PMO will monitor actual and projected costs against plan to assess utilization and monitor new funding needs for future funding requests as part of standard processes and apply updates per State schedule.

Level: High - Probability: 50% - Impact: 5 - Exposure 2.5

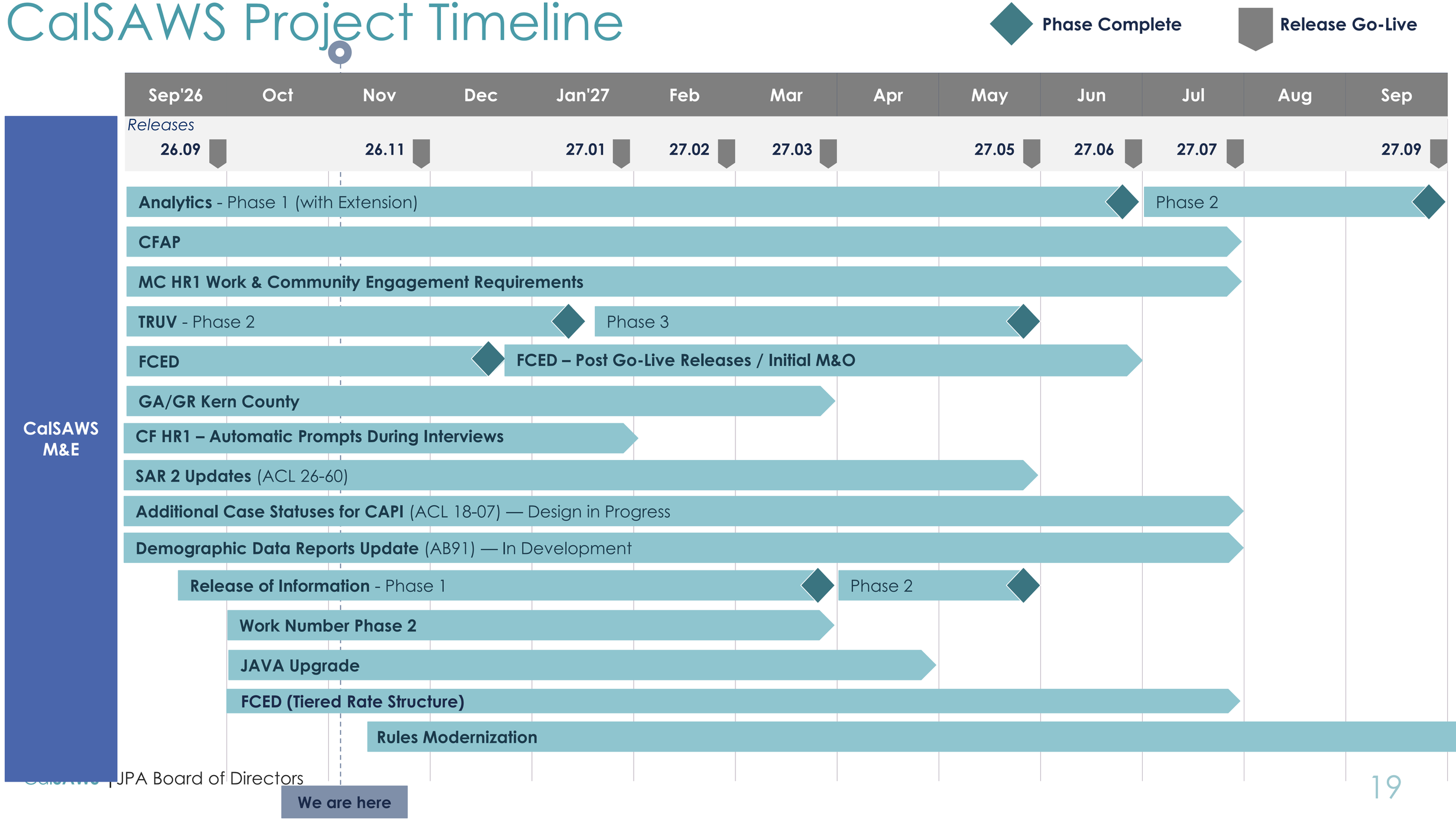
PMO Update

Staffing

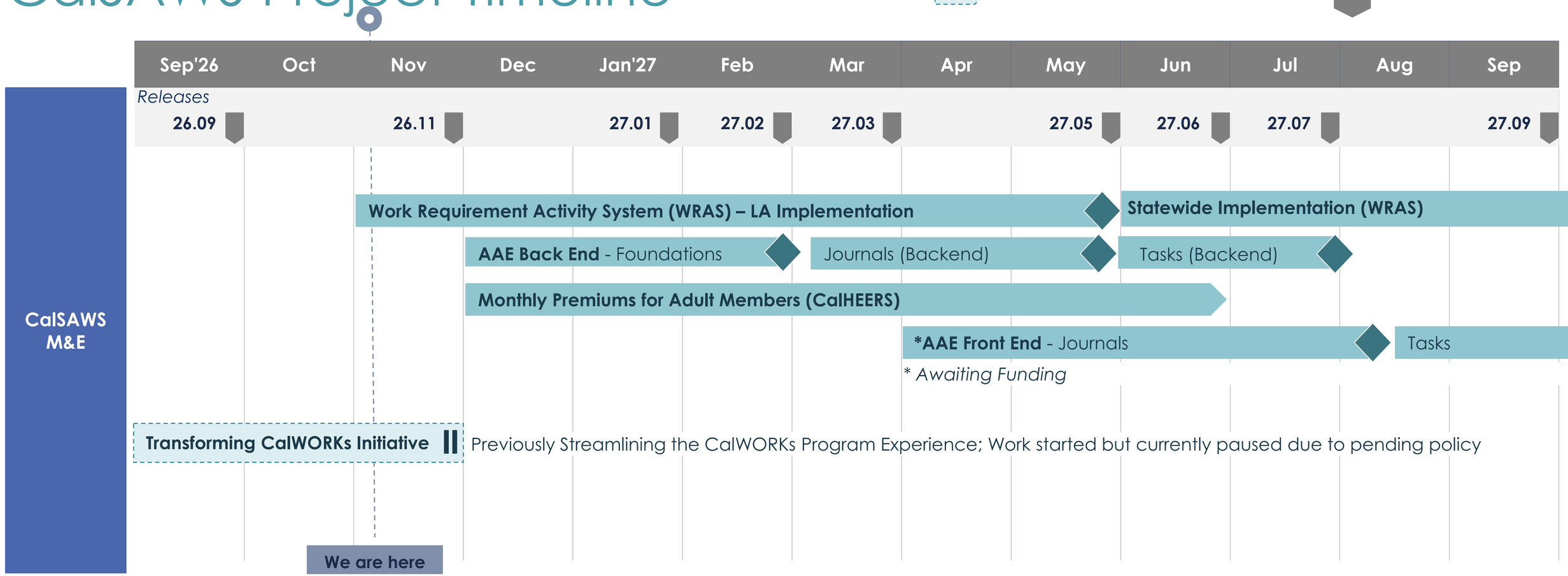
- Open Positions
  - Executive Director
  - Policy & Design Director
  - Data Protection and Privacy Manager
  - PMO Analyst
  - Technical Analyst (Analytics)



CalSAWS Project Timeline



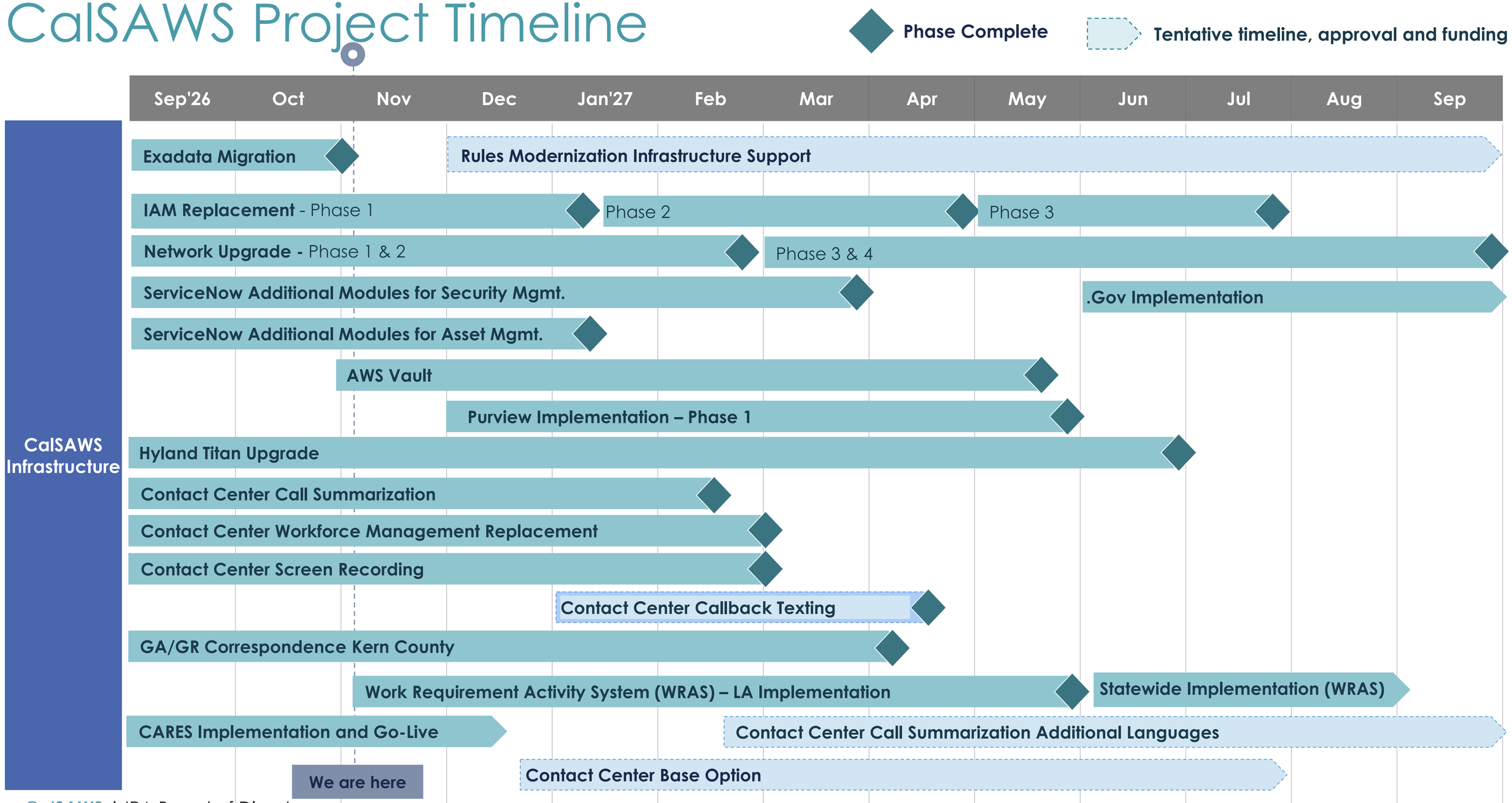
CalSAWS Project Timeline



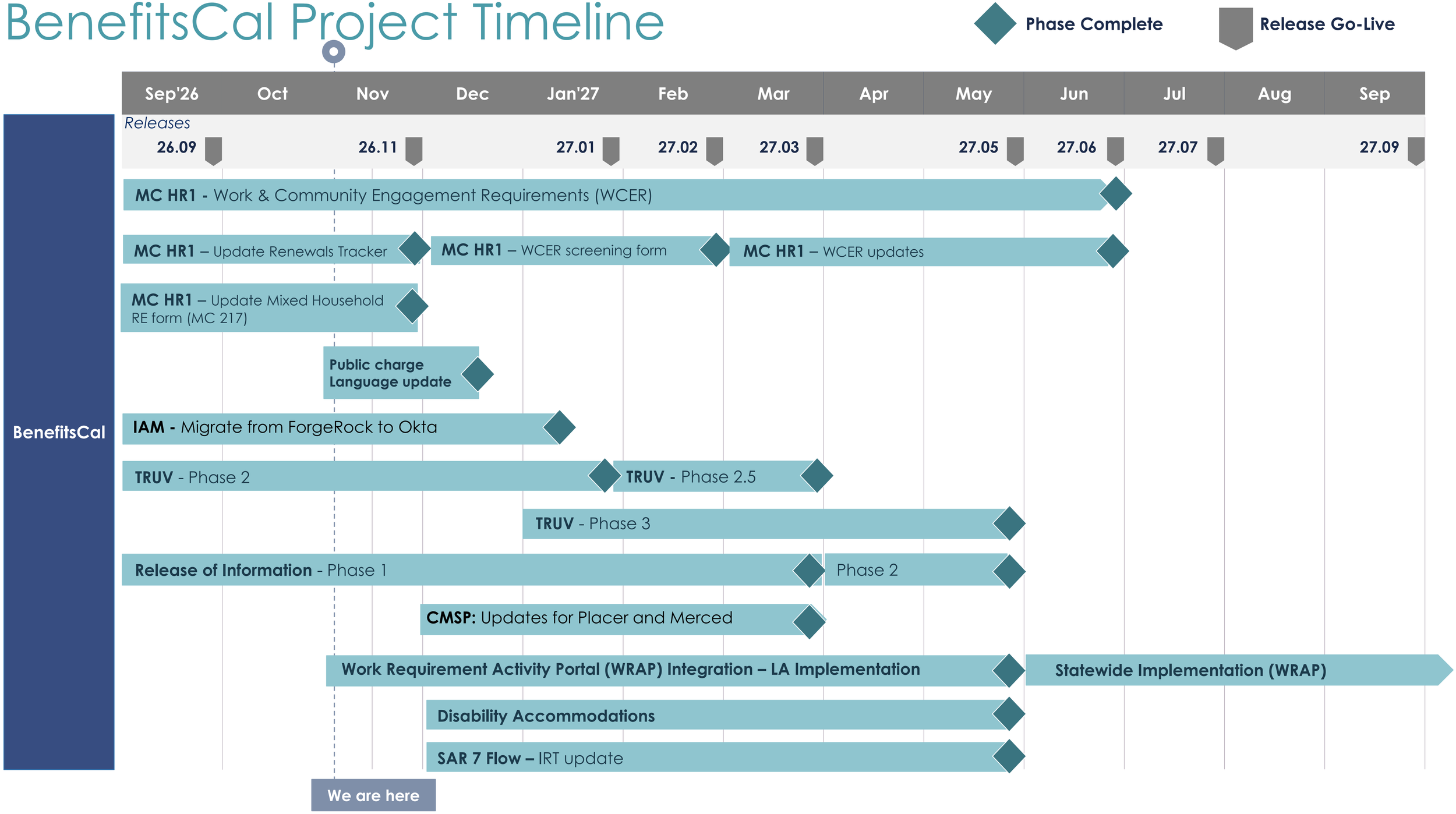
Awaiting policy

- National Accuracy Clearinghouse (NAC) Automation
- Child Health and Disability Prevention (CHDP) Program
- CalWORKs Domestic Violence (AB 969)
- Child Support Notice of Action
- Disparities Reduction Act (AB 1163)

CalSAWS Project Timeline



BenefitsCal Project Timeline

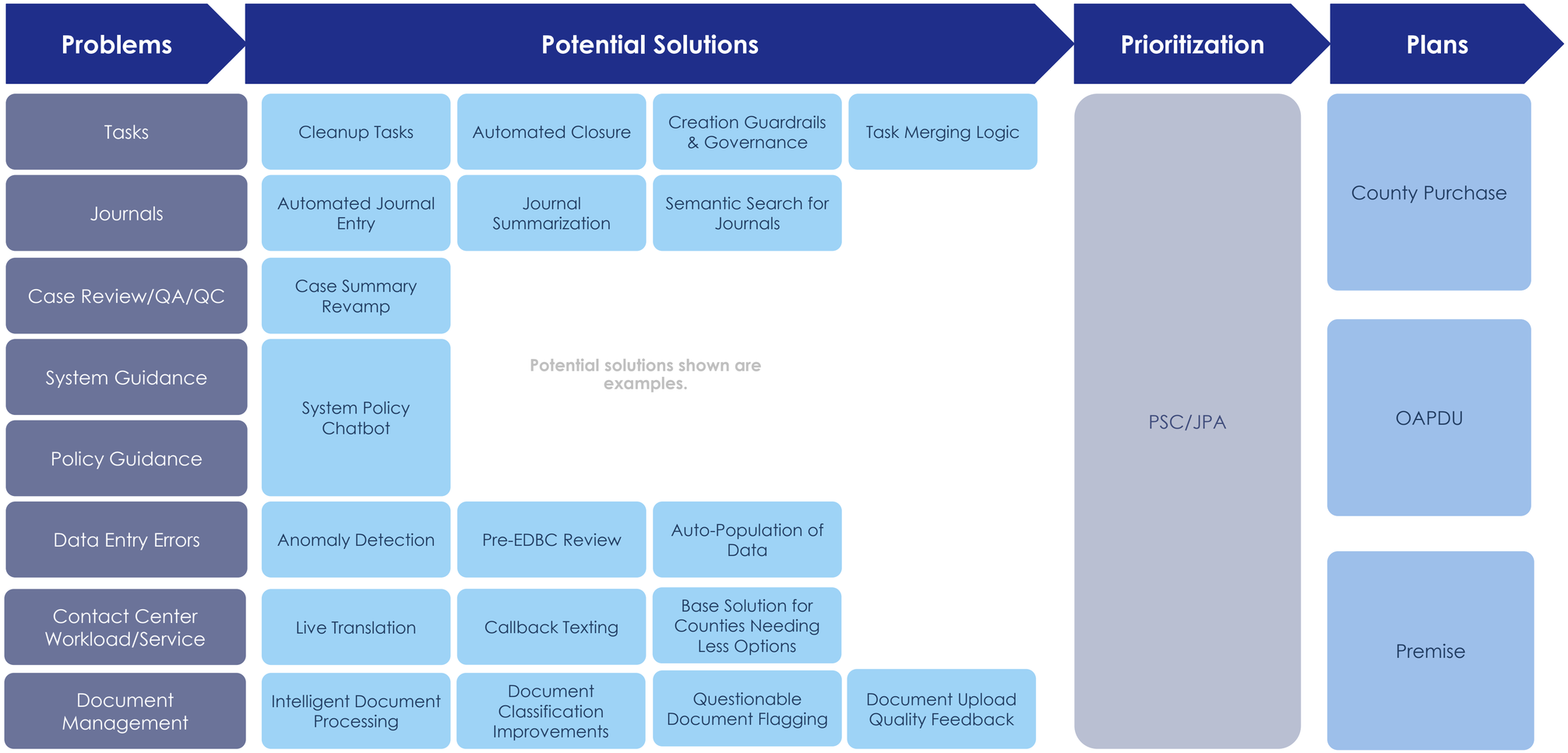


Strategic Planning Preparation

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



AI DLC

AI DLC Timeline

We are here

Proof of Concept (POC)

Establish AIDLC process & governance

Scope
26.09 Release

KEY ACCOMPLISHMENTS

- Executed 9 SCRs across business domains
- Established AI Governance and Security Guardrails
- Conducted design and test scenario workshops with Consortium BAs
- POC approval obtained with closeout tasks

Phase 1: Pilot

Pilot and Operationalization Plan

Target:
27.05 Release

KEY ACTIVITIES

- Execute 9 SCRs from the 27.05 release
- Conduct retrospective to incorporate into upcoming phase
- Approve Phase 2 plan
- Review materials and effectiveness of OCM and Training materials with the counties

Phase 2: Scale

Scale number of SCRs and operationalization plan approval

Target:
27.07 Release

KEY ACTIVITIES

- Execute 20-24 SCRs from the 27.07 release
- Conduct retrospective to incorporate into upcoming phase
- Approve production operationalization plan
- Prepare the Counties, roll out OCM materials and deliver training

Phase 3: Operationalize

Run all releases with AIDLC and Human in the Loop

Target:
Depending on Outcomes

KEY ACTIVITIES

- Continue to ramp up number of SCRs for execution
- Continuously refine process and operationalization plan based on lessons learned

POC Outcomes

POC involved 9 SCRs across various functional areas

Design

Generated Requirements, Impact analysis and Design documents and compared to human generated artifacts

- ✓ Better Impact analysis and requirements led to better design
- ✓ Impact analysis led to proactive discovery of potential issues

Lessons Learned

- Cover all SCR Types
- Simplify language in design documents

Development

Using artifacts from Design phase, generated code, unit tests and automated tests and validated against human generated artifacts

- ✓ Detailed design led to comprehensive code generation
- ✓ Better code generation led to lower regression risk
- ✓ AI assisted code development enabled speed to market

Lessons Learned

Keep refining process for multi module, complex SCRs

Testing

Executed automated tests via existing framework and compared results to 26.09 release

- ✓ Direct traceability of requirements to test scenarios led to better coverage
- ✓ Developed the capability to perform gap analysis for all SCRs

Lessons Learned

Standardize test scenarios; extend coverage

AI Governance @ CalSAWS

How CalSAWS Uses AI

One use is live today. Every AI capability must be registered and risk-tiered first.

IN PRODUCTION

Contact-center call summarization

Summarizes customer-service calls so staff spend less time on notes.

UNDER EVALUATION

AI in software delivery

Not live yet. Coding assistants and skills would be governed by what they can reach.

Staff productivity

Not live yet. Drafting, research and analysis support, on approved tools only.

NEW IDEAS

New ideas

Every idea is registered and risk-assessed before any pilot work begins.

Third-party AI risk

AI is now built into most vendor products, such as help desk and reporting tools. Assess each one and put guardrails in place.

THE GUARDRAIL

AI assists. People decide.

AI never independently determines eligibility, benefits or adverse actions.

Required for every use case

- A person makes the final decision
- Human review before reliance
- Right to appeal or request correction

Scope: CalSAWS's own use of AI. Defense against external AI threats is a separate topic.

Our AI Design Principles

The AI Governance Framework, informed by the NIST AI Risk Management Framework and PMI-CPMAI, sets seven principles for every use case.

01

Business-sponsored

A named Executive Business Sponsor is accountable for each use case.

02

Business-justified

Used only where it clearly beats a simpler, non-AI approach.

03

Risk-proportionate

Governance scales with impact: more rigor where stakes are higher.

04

Human accountability

AI assists. A designated person stays accountable for outcomes.

05

Secure and privacy-preserving

Existing security and privacy rules apply in full, plus AI-specific controls.

06

Transparent and explainable

Where required, people know what it does and what data it uses.

07

Monitored after deployment

Oversight does not end at approval. AI is monitored in production.

Useful, accountable and safe, by design rather than by exception.

Every AI Use Governed

AI governance sits inside the Architecture Review Board (ARB) process

AI Governance Body (AI-GB) — CTO · CISO · CIO

Executive review of Medium and High risk AI uses, inside the ARB process.

ARCHITECTURE REVIEW BOARD: DESIGN REVIEWED BEFORE BUILD AND BEFORE GO-LIVE

STAGE 0
Intake and risk triage
Mandatory first step: register and set the risk tier.

STAGE 1 · ARB GATE
ARB design review
Design reviewed with an AI addendum before build.

STAGE 2 · ARB GATE
ARB production readiness
Evidence that required controls work before go-live.

STAGE 3
Monitor and reassess
Ongoing oversight. Material change triggers ARB re-review.

CHANGE MANAGEMENT: material change triggers ARB re-review

RISK TIERING: FOUR TIERS SET THE DEPTH OF REVIEW

Low
Registration and approved-tool controls

Medium
AI-GB review as an ARB sub-process

High
Full AI-GB, ARB, security, privacy and data review

Restricted
Prohibited, or explicit executive sign-off

Tiers rise with who is affected (CalSAWS staff, county staff, then customers), data sensitivity and autonomy.

Our Guardrails: 13 Control Families

Every AI use case is checked against these families, and the proof required rises with its risk tier.

Protect data and systems	Keep people in charge	Trust the output	Prove and respond
Data Handling & Classification	**Human Oversight & Review**	**Model & Prompt Management**	**Logging & Auditability**
Agent Access & Identity	**Agent Autonomy & Reach**	**Data Grounding & Provenance** Where retrieval is used	**Change Management & Reassessment**
Vendor & Third-Party	**Fairness & Service Equity** Where people are affected	**Output Quality & Monitoring**	**Incident Response & Rollback**
Security & Adversarial Testing			

Depth scales with the tier:

- Low is registration only
- Restricted adds independent verification, a tested kill switch and full red-team testing

What This Means for CalSAWS

CalSAWS adopts AI deliberately, governs it independently, and keeps people accountable.

Deliberate

Adopted carefully, never rushed

Every use case is registered and risk-tiered before any pilot work.

Nothing proceeds until intake is complete, even if experimental or vendor-provided.

Governed

Independently reviewed before go-live

Architecture Review Board (ARB) design and go-live gates, with AI-specific evidence.

Vendor and embedded AI is reviewed for data training, retention and residency.

Accountable

Named owners; people decide

Every use case has a named Executive Business Sponsor.

Every approval is documented: what evidence, which controls, who accepted the risk.

Monitored

Oversight continues after launch

Model, data or autonomy changes, and incidents, trigger reassessment.

Monthly reporting to the AI-GB, the Architecture Review Board and leadership.

Innovation Update

CalSAWS | JPA Board of Directors

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 7th, the Innovation Panel approved both ideas to advance. These ideas were scoped for business and technical impact, alongside two prototype demonstrations.
- Both PoC demos were shown as a status update to the Innovation Panel on November 4th, with approval to proceed into official PoC development & testing.

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 CalSAWS
- 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 Assistance

One proof of concept, phases 1 and 3 active this round

PHASE 1 · BEFORE THE INTERVIEW

Case scan

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

PHASE 2 · DURING

Real-time flags

When the client says something that conflicts with the case file, the matching item flags [Stretch Goal].

PHASE 3 · AFTER

Journal draft

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

Later, beyond this PoC: 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.

CalSAWS Innovation

Potential Themes for Q2 Cycle

EARLY CHECKS, BETTER OUTCOMES (Extension - Recommended)
How might we catch or prevent errors before they affect eligibility or payments?

DECISIONS DELIVERED SOONER
How might we shorten the wait from application to determination for eligible customers?

SUPPORT, SUSTAINED
How might we reduce churn ? Eligible customers losing benefits over missed paperwork or notices, so coverage doesn't lapse and they don't have to reapply ?

REDUCE THE ROUTINE, INCREASE THE IMPACT
How might we cut the manual, repetitive work such as journaling, re-keying, chasing tasks - so workers spend more time with customers?

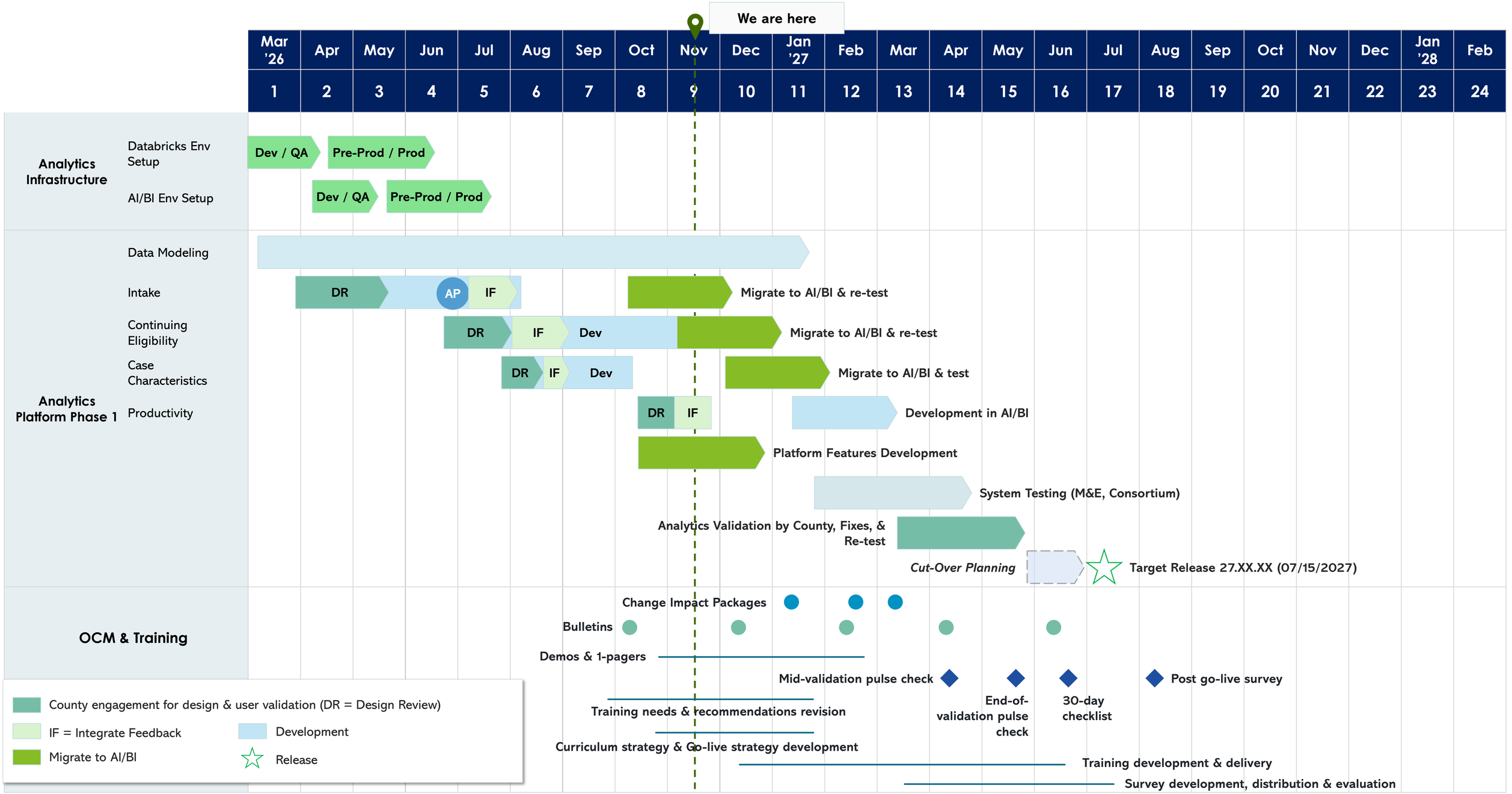
ALWAYS INFORMED, ALWAYS EMPOWERED
How might we give customers status visibility and self-service so they don't have to call for what a screen could show?

COMMUNICATION THAT DELIVERS, LANGUAGE THAT CONNECTS
How might we make communication clear, timely, and multilingual so customers are served better?

Analytics Update

CalSAWS | JPA Board of Directors

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



Subject Area – Sprint Status

Highlights Since Last JPA:

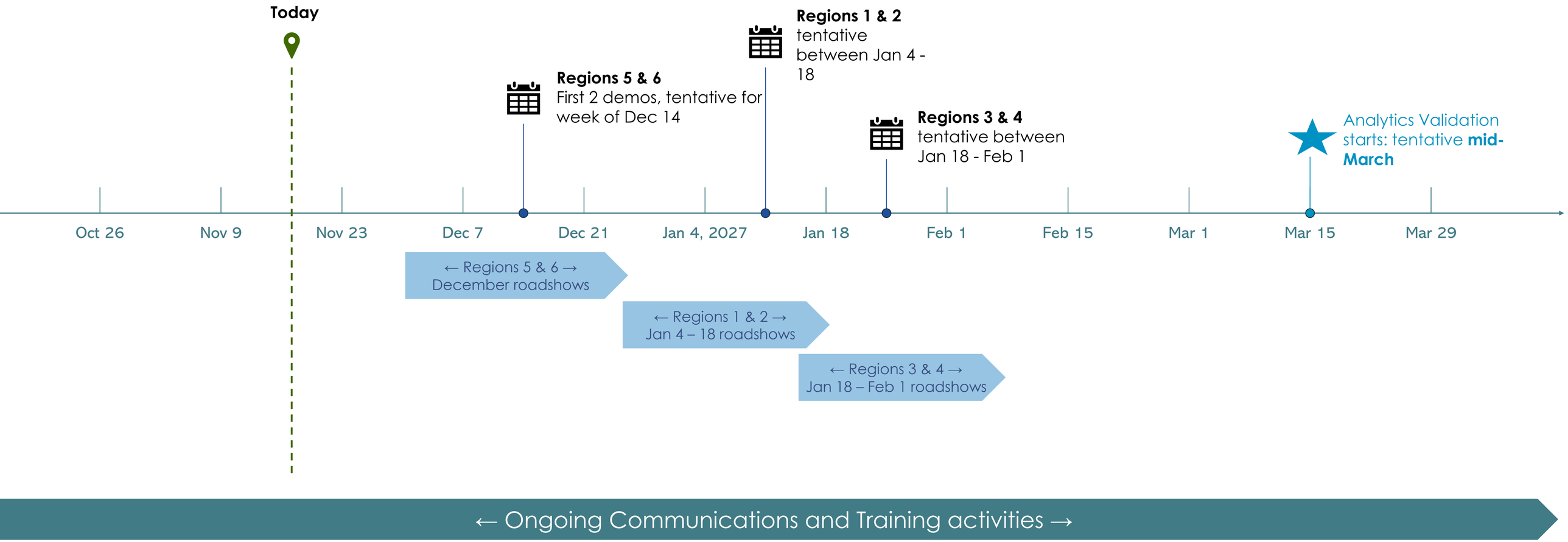
- Design & Development* for the **Case Characteristics** is **100% complete**
- Design for **Productivity** is in progress
- **Migration** for **Intake module** dashboards **to AI/BI** has started

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



← Ongoing Communications and Training activities →

Risk 332

Limited County review capacity may impact Analytics Modernization Delivery Schedule

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

Mitigation Approach:

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

Data Analytics Risk

Technical Advisory Workgroup

Technical Advisory Workgroup: Kick-Off Session Highlights

County And CalSAWS Technical Leaders Review Major Initiatives Before They Reach This Board.

WHO SITS ON THE TAW

6 **County IT leaders**
Voting, 6 regional seats

3 **CalSAWS leaders**
Nonvoting: CIO, CTO, CISO

1 **State Partner**
Nonvoting: CalHHS OTSI Chief Deputy Director

6 **Vendor Partners**
Nonvoting: Technical and Application Teams

2 **QA Partners**
Nonvoting: Technical QA Team

EVERY INITIATIVE IS EVALUATED AGAINST

- **Strategic alignment**
- **Stakeholder benefit**
- **Org. readiness**
- **Feasibility**
- **Risk management**

WHAT WE ASK OF THE WORKGROUP

1. **Did we miss anything?**
2. **Is there a better approach?**
3. **Can counties support this approach?**

Technical Advisory Workgroup: Kick-Off Session Highlights

Three topics were discussed at the Workgroup

HOW AN INITIATIVE REACHES THE BOARD

1. **Origination**
2. **Development and vetting by CIO, CTO, CISO**
3. **Submission to the TAW**
4. **TAW review**
5. **Recommendation to the Executive Director and JPA Board**

NOVEMBER 5: CONDUCTED FIRST WORKING SESSION WITH TAW

Rules Engine

Approved to present to the JPA

Journals

Approved to present to the JPA

NOVEMBER 16: TASK MANAGEMENT ADDITIONAL REVIEW SCHEDULED

Task Management

Approved to present to the JPA

Rules Engine Modernization

Reviewed by TAW on November 5 (Technical Topic 1 of 3)

THE PROBLEM

TODAY	PROJECTED (HR1)
Users affected daily	
~3,500	**~6,500**
See **~7 sec delay**	Will see **~14 sec delay**
SLA missed	
~20 days/mo	**Every day**

Today reflects actual load. Projected is based on anticipated HR1 impact (+10-15% load)

RECOMMENDED SOLUTION

Modernize EDBC Rules to Java-based rules service

BASIS: CALFRESH ASSESSMENT

- ✓ ~20% performance improvement
- ✓ All 614 (100%) benefit-matched
- ✓ De-risked through extended parallel testing

POTENTIAL IMPACT

- ✓ Improve county worker experience with **faster eligibility determinations**
- ✓ Improve **performance, scalability and resilience** of eligibility determinations
- ✓ Establish a **foundation for future rules enhancements** to prevent policy errors

Breaking the CalSAWS Monolith into Modular

Reviewed by TAW on November 5

The project determined the separation/ decoupling approach for each domain

WHERE MONOLITH LIMITS

- **Slower Delivery To Production**
- **Limited Scalability for New Ideas**
- **Higher Risk of Release Issues**

WHERE MODULAR SUPPORTS

1. **Increased Application Life**
2. **Scalability**
3. **Stable Changes & Integrations**
4. **Performance Improvement**

Potential Risks

Current Functionality:
Runs as usual. Parallel execution, nothing goes live until it's proven to match.

Existing Pipeline of Changes:
SCRs and Policy Changes **keep their schedule.**

Path to Completion:
All modules are identified, prioritization continues based on county needs

Journals & Tasks Modernization : Informed by County Priorities

Reviewed by TAW on November 5 (Technical Topic 2 and 3)

JOURNALS

WHY THIS MODULE?

- **Top county need:** improve error rates and reduce workload
- **Easy to separate** from the current architecture
- **Innovation Panel** prioritized candidate

WHAT THIS ENABLES FOR FUTURE

- **Automated journal entries**
- **Enhanced journal search**
- **Quick journal summarization**

HOW WE WILL DO IT

Full Separation/Decoupling:

- *Fully independent module*
- *No shared runtime with legacy*

TASK MANAGEMENT

- **Highly Used:** Reduce manual processing and improve efficiency.
- **Requires flexibility** to holistically meet county needs.

- **Streamlined task tracking & productivity dashboard**
- **Automated task closure**
- **Reduced duplicate tasks**

Partial Separation/ Decoupling:

- *Front end and back end fully decoupled*
- *Database partially decoupled*

BenefitsCal Status Update

CalSAWS | JPA Board of Directors

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

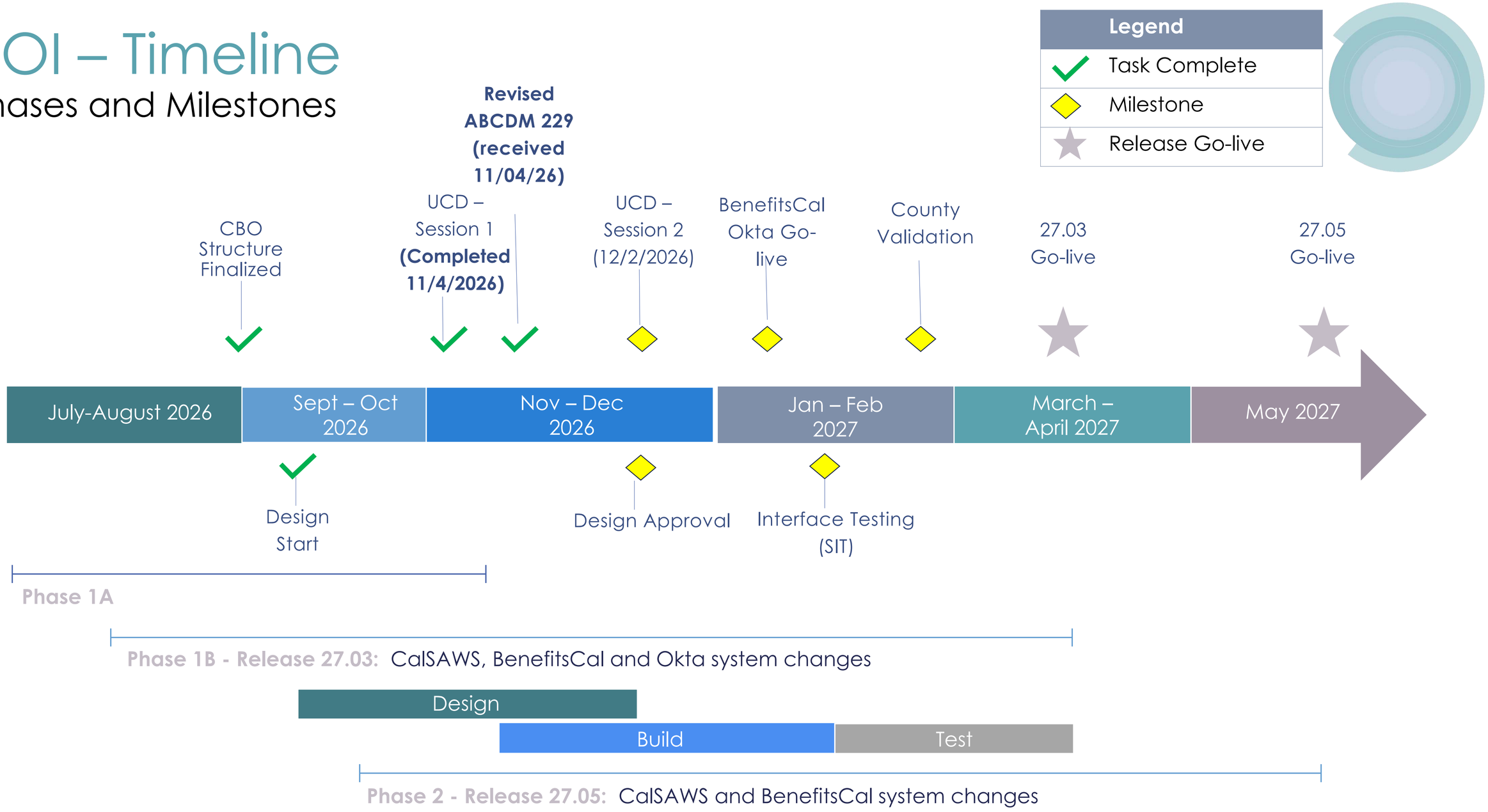
Phase 2

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

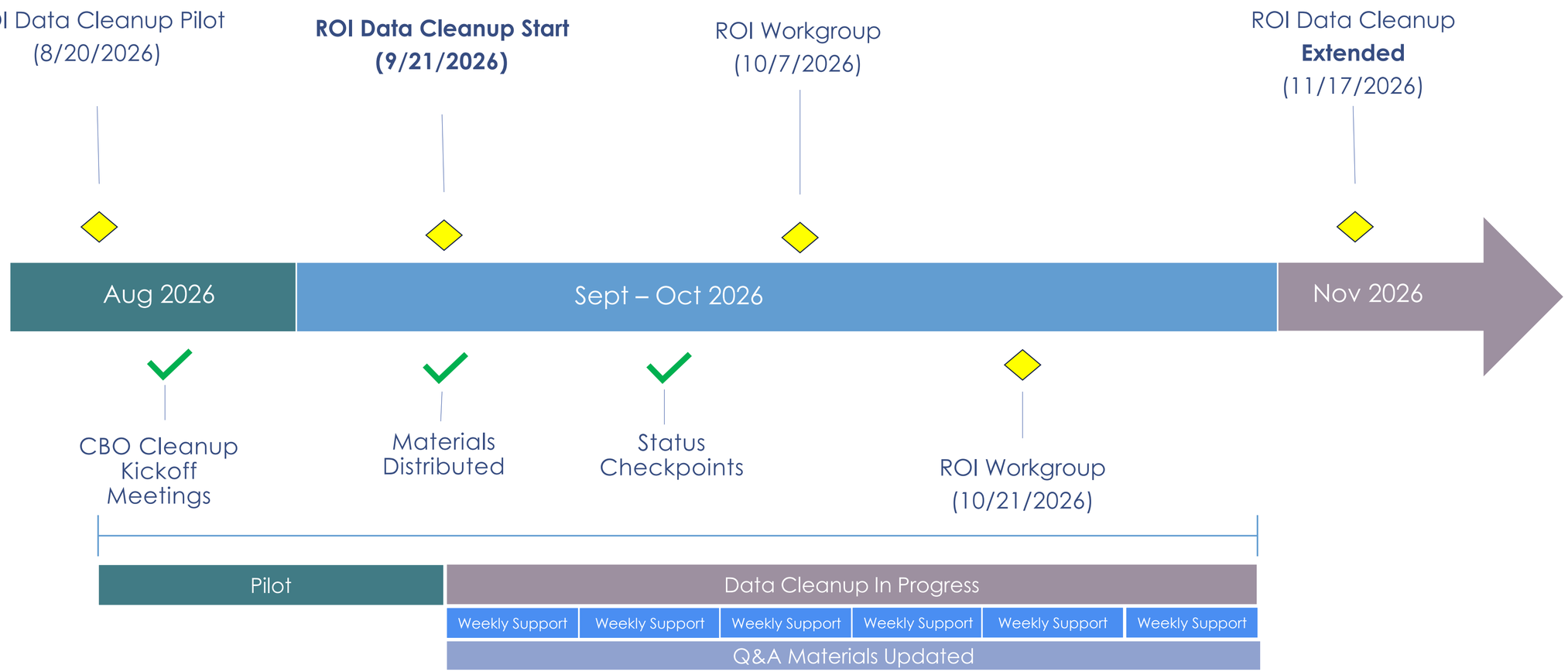
Phases and Milestones



ROI – Timeline

CBO Data Cleanup Activities

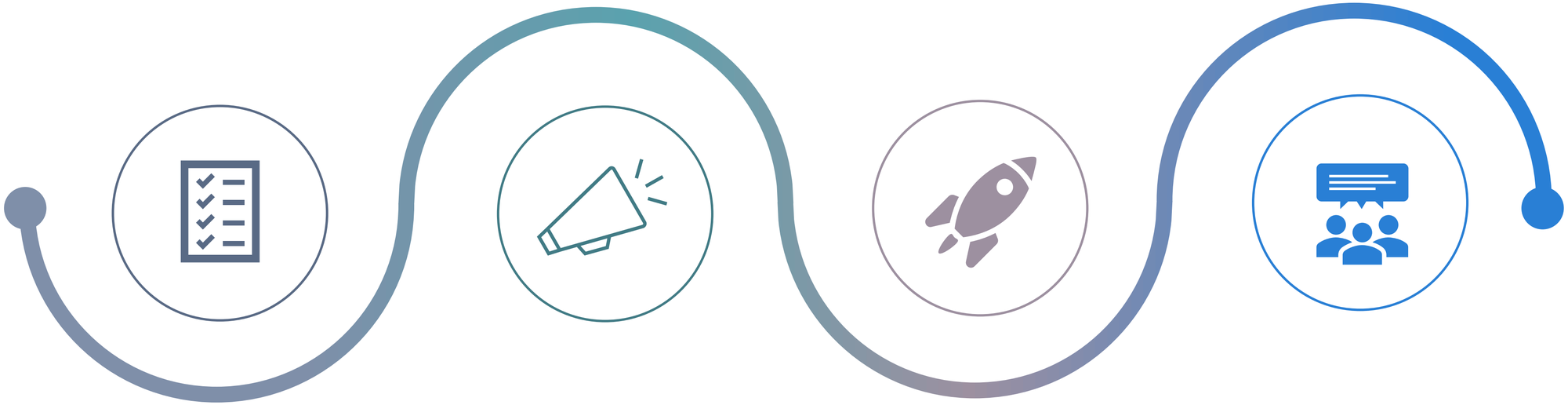
Legend	
✓	Task Complete
◆	Milestone
★	Release Go-live



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

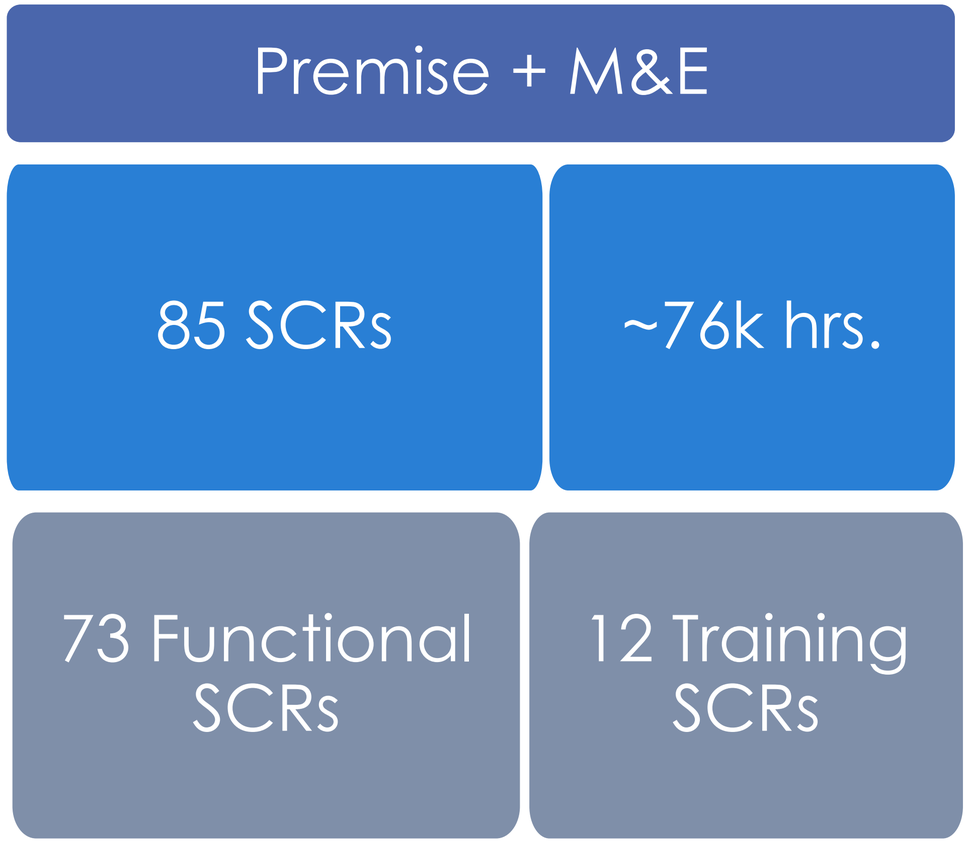
Post-Release Daily calls:
11/23/2026 – 11/25/2026

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 design 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.

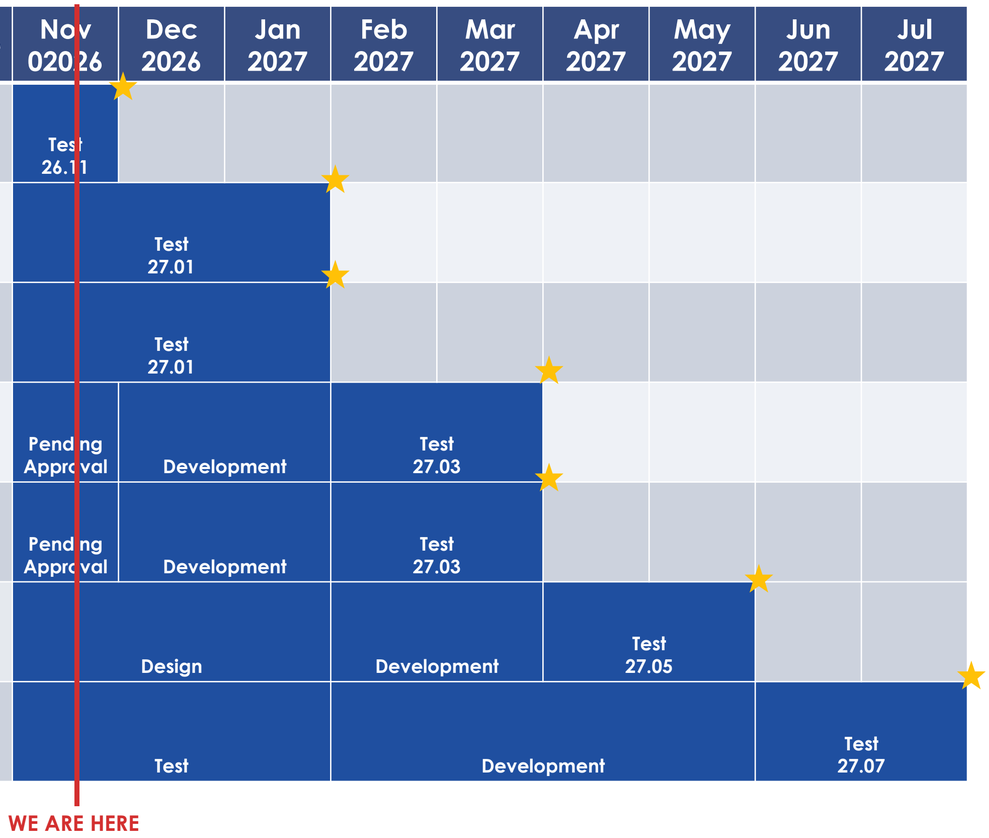
CalFresh/CalWORKs HR 1 and Policy Updates*

In Progress

★ Target Go-Live / Release Version

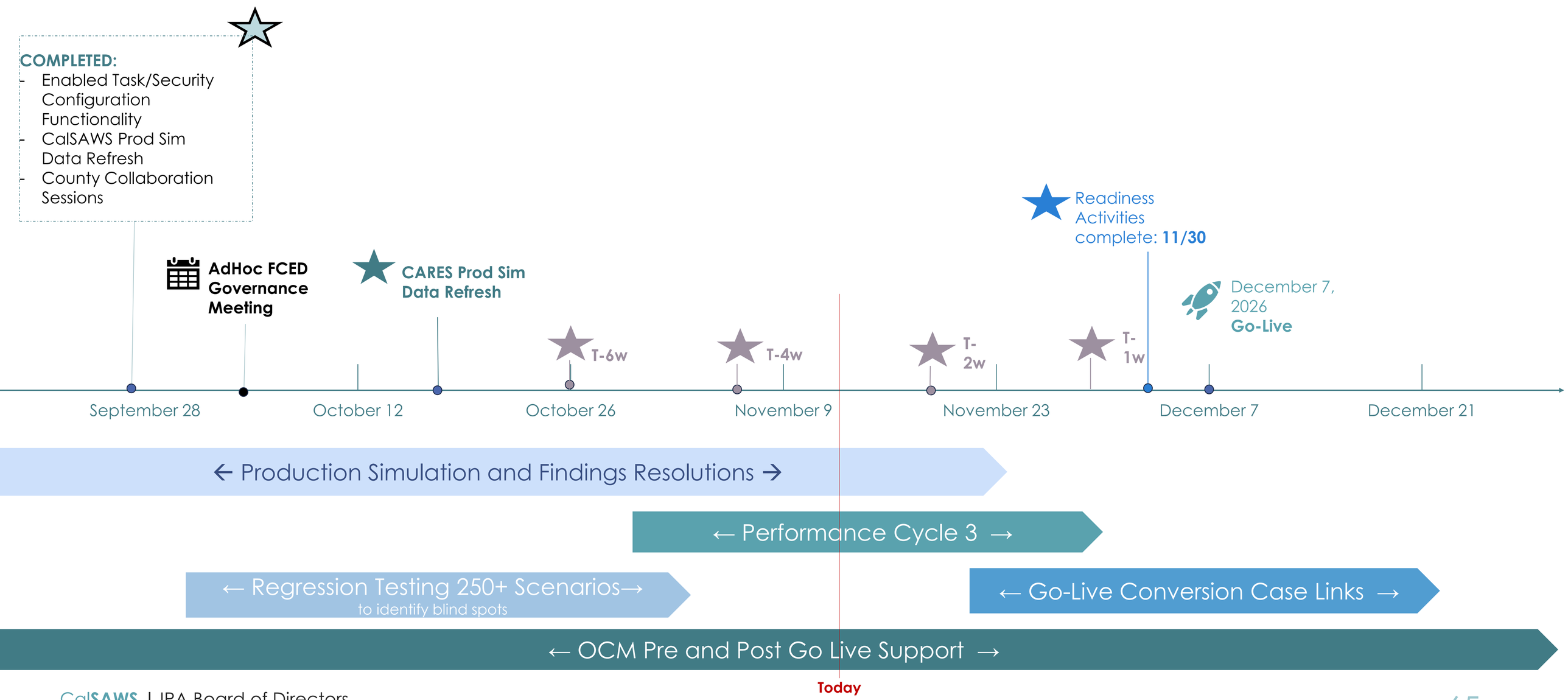
** Target releases are subject to change.*

System Change Requests	Policy Effective Date
CA-298517/CSPM-83660 - Truv Income Verification Integration Phase 2a (Off-State)	12/31/2026
CA-299535 - ABAWD Discretionary Exemption Tracking – Long Term Solution	11/1/2026
CA-302266/CSPM-83660 - Truv Income Verification Integration Phase 2b (On-State)	12/31/2026
CA-300464/CSPM-85976 - Work Number Integration – Phase 2 - Prevent EDBC processing until report is verified by a worker.	3/1/2027
CA-303538/CSPM 85165--ACL 26-55 Extension of Eligibility for RCA/TCVAP Programs	10/1/2026
CA-299026/CSPM-84656 – Truv Income Verification Integration Phase 3	3/1/2027
CA-288562 - CFAP Expansion Phase 1	10/01/2027



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; 5 prioritized for the 12/7 release and 6 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 Update

Microsoft Outage

November 12-13, 2026

Outage

- Microsoft announces that users may be unable to connect to Microsoft 365 services at 10:10
- Microsoft reports an overload on infrastructure services
- Most services restored by 7:00 pm on November 12
- Microsoft states the root cause was a network change by Microsoft

Current

- This outage affected the ability of CalSAWS users to obtain one-time passwords (OTP)
- CalSAWS Service Desk worked with Counties to enter in over 100 phone numbers for individuals without a phone number on file
- 37 Counties have opted into text as a secondary option with various state of setup

Potential

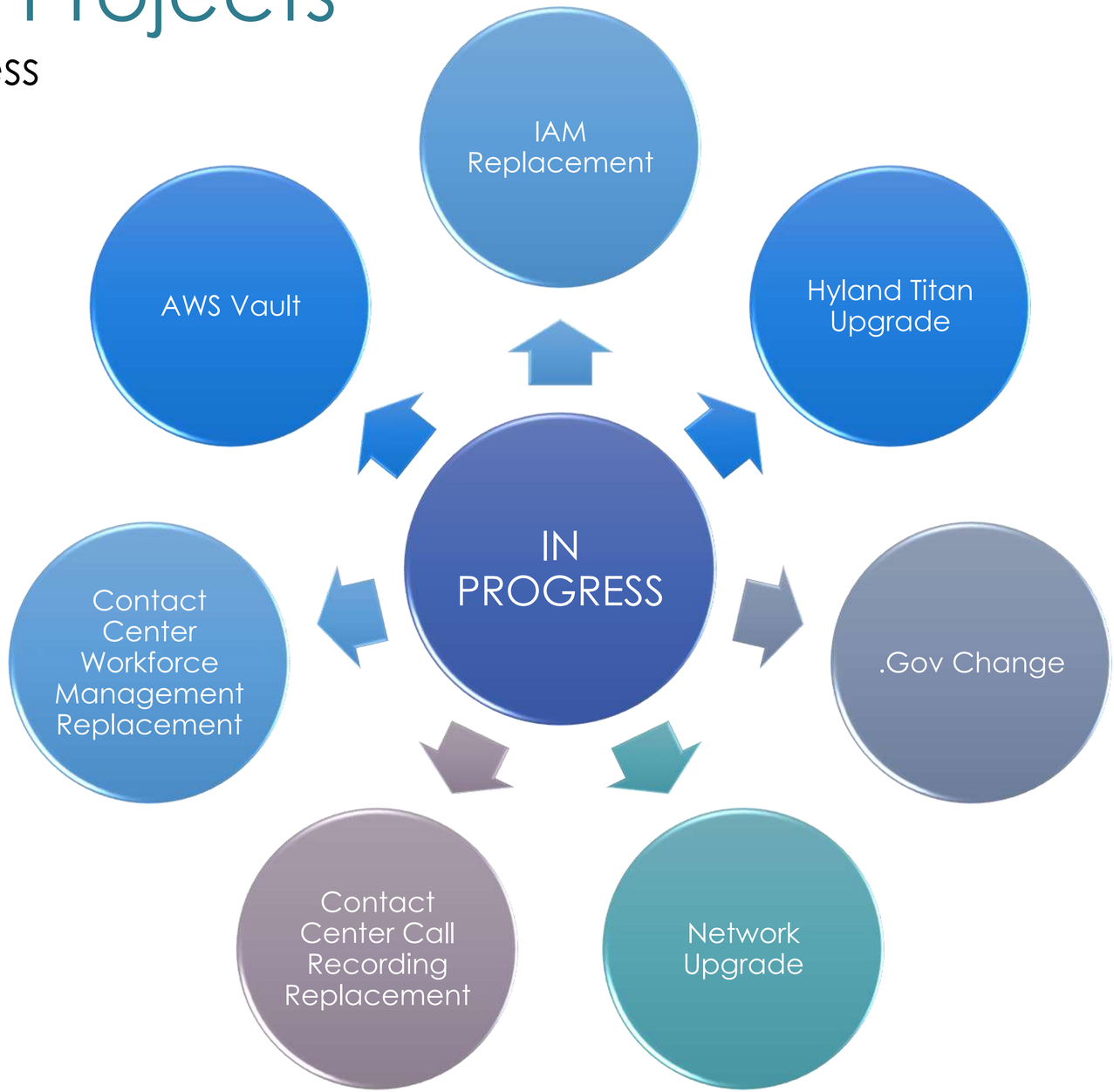
- Post the migration to Okta, additional options for login are available, including advanced login capabilities
  - These are under analysis and research for applicability in the CalSAWS environment and funding



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

IAM Replacement

Project Watch Items

Change Management and Non-Technical

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

Technical

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

Risk 338

Replacement of Identity Access Management Solution

Risk:

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

Mitigation Actions:

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

Risk 350

IAM Cutover Weekend Timing Could Result in Delays

Risk: If coordination and timing is incorrect across the various efforts during cutover weekend are incorrect, the IAM testing period for the Counties may shift or the cutover may not be completed in time. IAM cutover weekend includes a COLA and batch run in addition to the IAM cutover.

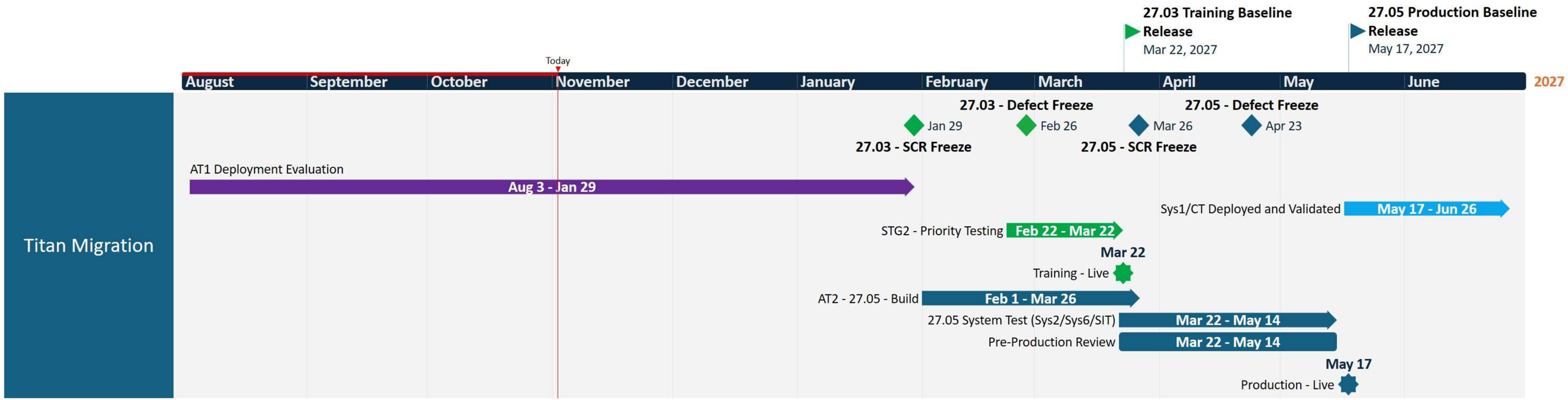
Mitigation Approach:

- Create a coordinated IAM cutover plan that includes timing of the COLA run, batch and the IAM implementation activities.
- Establish a point of contact for task completion reporting and escalation path, if needed.
- Establish a communication path with the Counties conducting testing to provide updates on the progress to testing.

Infrastructure Projects

Hyland Titan

Hyland Titan Upgrade



Adjourn Meeting