



## Implementation Plan

# Prefilled JobsNOW! Client Intake Form

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*This implementation plan was developed by Aspen Policy Academy leaders while participating in the 2026 Tech Executive Leadership Initiative (TELI). It outlines the process of building a prefilled JobsNOW! intake form to streamline eligibility and support Medi-Cal recipients ahead of 2027 requirements. The full project, including a policy brief explaining the leaders' core recommendations, is [available here](#). Please note that all authors' opinions published here are their own. This publication does not reflect the views of the Aspen Policy Academy or the Aspen Institute.*

This implementation plan serves as a reference for the City and County of San Francisco Mayor's Office of Innovation (MOI) as it coordinates the design, build, and launch of a prefilled JobsNOW! client intake form integrated with the California Statewide Automated Welfare System (CalSAWS). The prefilled web form would allow the Employment and Training Specialists (ETS) who verify benefits eligibility to reduce time-consuming data entry work and focus on supporting Medi-Cal recipients who are most at risk of losing their coverage.

This implementation plan defines the roles and responsibilities of each stakeholder agency and outlines the sequencing of stakeholder engagement required to ensure that the solution is operational before the work requirements mandated by the One Big Beautiful Bill Act (OBBBA, also known as H.R. 1) take effect on January 1, 2027. The budget estimate highlights assumptions and is broken down into one-time build costs and annual recurring costs.

## Implementation Stakeholders

| Stakeholder                        | Role and Stake                                                                      |
|------------------------------------|-------------------------------------------------------------------------------------|
| Mayor's Office of Innovation (MOI) | <u>Implementation organization</u> . Delivers and maintains the prefilled web form. |

| Stakeholder                                                              | Role and Stake                                                                                                                                                                   |
|--------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| San Francisco Human Services Agency (SFHSA)                              | <u>Business owner and subject matter expert.</u> Owns the JobsNOW! program.                                                                                                      |
| CalSAWS                                                                  | <u>Data provider.</u> Serves as the system of record for the Medi-Cal data that would populate the web form.                                                                     |
| City and County of San Francisco (CCSF)<br>Department of Technology (DT) | <u>Infrastructure owner.</u> Manages CCSF's single sign-on (SSO) to be used for ETS accounts, security, services such as DocuSign, and cloud hosting for the prefilled web form. |

## Implementation Phases

The time estimates below are subject to change based on predevelopment learnings.

### Predevelopment (1 month)

- **MOI and SFHSA:** Obtain formal sign-off from leadership to build the prefilled web form. Secure budget approval. SFHSA designates a business owner to serve as MOI's primary point of contact throughout the implementation. SFHSA identifies which service center will host the pilot.
- **MOI and DT:** Set up development, staging, and pilot environments for building and testing. Integrate with CCSF's existing SSO infrastructure. Provision access to DocuSign, which is already used by CCSF. Define service level agreement (SLA) for infrastructure uptime and support.
- **MOI and CalSAWS:** Map intake form fields against CalSAWS application programming interface (API) and confirm that the existing API provides the necessary data. Obtain API credentials and documentation.

### Development (2 months)

- **MOI:** Build prefilled web form while gathering input from the SFHSA business owner.
- **SFHSA:** Respond to any MOI team questions about JobsNOW! and the intake process. Provide feedback on the form throughout development.
- **CalSAWS:** Respond to any MOI team questions about the API.
- **DT:** Host the infrastructure for development.

## Pilot (1 month)

- **MOI:** Deploy to one service center to be used in real client intake meetings before full rollout across all service centers. Collect, analyze, and address usability data and feedback on the following questions:
  - **Usability:** Can ETS navigate the form easily?
  - **Time to completion:** Does the prefilled form meaningfully shorten the clerical intake time compared with the current process?
  - **Data quality:** Are the CalSAWS data accurate? How often do staff need to manually correct fields?
  - **Conversation richness:** Does time saved from data entry enable staff to spend more time on substantive client needs?
- **SFHSA:** Manage pilot logistics and facilitate MOI feedback collection.
- **CalSAWS:** On call for troubleshooting if API issues arise during the pilot.
- **DT:** Set up and support the pilot environment.

## Rollout (2 months)

- **MOI:** Deploy across all services centers. Fix high-priority bugs discovered during initial usage. Provide SFHSA with training materials and FAQ.
- **SFHSA:** Deliver training to staff. Provide close support to staff during ramp-up of usage.
- **DT:** Own production infrastructure and SLAs. Resolve any initial launch problems.

## Annual Maintenance

- **MOI:** Modify income tier categorization logic if and when criteria change. Make changes to the API as necessary. Address workflow issues, bugs, and client data errors as they arise from SFHSA and security recommendations from DT.
- **SFHSA:** Communicate any workflow issues, bugs, or client data errors. Train new staff.
- **DT:** Conduct security reviews. Maintain SLAs, address sign on help requests from staff, close accounts as staff leave, and create accounts as staff join.

# Budget Estimate

## One-Time Costs

This proposal would likely qualify for a 90% federal Centers for Medicare and Medicaid Services (CMS) match because it involves the design, development, installation, or enhancement of Medicaid eligibility and enrollment (E&E) systems.

| Item                    | SFHSA Est. Cost | MOI Est. Cost | Assumptions                                                                                                                                                                                                                                                 | Notes                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------|-----------------|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| MOI staff               | \$0             | \$210,000     | <p>Development would require a half-time product manager, a half-time designer, and a software developer.</p> <p>Implementation would take 6 months.</p> <p>MOI development costs would be absorbed by the Mayor's Office and not billed back to SFHSA.</p> | <p>Estimate is derived from salary band data (prorated to 6 months) and a standard fully loaded cost multiplier.</p> <p>Roughly \$210,000 per person (based on midpoint of <u>MOI senior engineer salary post</u>) fully loaded (20% estimate for fringe), \$17,500 per person-month.</p> <p>\$210,000 total estimated cost (\$17,500 per person-month)</p> |
| CalSAWS API Integration | \$0-TBD         | \$0           | <p>The existing API exposes all the required fields.</p> <p>CCSF's existing co-ownership of CalSAWS would absorb the integration costs. CalSAWS staff have the capacity to support this initiative in time for H.R. 1 to take effect.</p>                   | <p>If the necessary data do not exist in the API today, then there may be a fee billed to SFHSA.</p>                                                                                                                                                                                                                                                        |

| Item        | SFHSA Est. Cost | MOI Est. Cost | Assumptions                                                                                                                                                                                                                                                                                                                                                                                                                       | Notes |
|-------------|-----------------|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| DT services | TBD             | \$0           | DocuSign (or equivalent) is an approved service with available licenses for SFHSA staff; it would be used for the client signature feature in the web form. DT services would bill costs for SSO integration, security, and cloud environment setup, hosting, DocuSign licenses, and DocuSign cost per signature back to SFHSA. DT services staff have the capacity to support this initiative in time for H.R. 1 to take effect. |       |
| Training    | TBD             | \$0           | SFHSA would be responsible for training.                                                                                                                                                                                                                                                                                                                                                                                          |       |

### Annual Recurring Costs

This proposal would likely qualify for a 75% federal CMS match for the maintenance and operation of Medicaid E&E systems.

| Item            | SFHSA Est. Cost | MOI Est. Cost     | Assumptions                                                                                                                                                                                | Notes                                                   |
|-----------------|-----------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| MOI maintenance | \$0             | \$21,000–\$31,500 | 10%–15% of original MOI staff time would be spent addressing bugs, security, workflow changes. MOI development costs would be absorbed by the Mayor’s Office and not billed back to SFHSA. | Level of involvement depends on the severity of issues. |

| Item        | SFHSA Est. Cost | MOI Est. Cost | Assumptions                                                                                                                                               | Notes |
|-------------|-----------------|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| DT services | TBD             | \$0           | DT services would bill costs for SSO integration, security, cloud environment, hosting, DocuSign licenses, and DocuSign cost per signature back to SFHSA. |       |

### Demo of Intake Form Assistant

The following is a step-by-step demonstration of the new intake form assistant. These images are for demonstration purposes only and not affiliated with the City and County of San Francisco or any government agency. [You can view a video walkthrough here.](#)

**Images 1 and 2:** Staff sign in to the intake assistant with their SFHSA credentials.

The screenshot shows the login interface for the Intake Form Assistant. At the top left is the San Francisco Human Services Agency logo. Below it, the text reads "SAN FRANCISCO HUMAN SERVICES AGENCY" and "Intake Form Assistant". There are two input fields: "Username" with the placeholder text "Enter username" and "Password" with the placeholder text "Enter password". A teal "Sign In" button is located at the bottom.

This screenshot shows the same login interface as the previous one, but with the Username field filled with the text "jsmith" and the Password field filled with a series of dots, indicating a password has been entered. The "Sign In" button is now a darker teal color, suggesting it is active.

Image 3: Staff log in to the platform.

DEMO ONLY — Not affiliated with the City and County of San Francisco or any government agency. No data is stored or transmitted. Any information can be used to proceed through the demo.

SAN FRANCISCO HUMAN SERVICES AGENCY Intake Form Assistant jsmith - Downtown Office

### New Intake

First Name \* Last Name \* Date of Birth \*

Magdalena Esposito 01/01/1970

Look Up

Enter the applicant's name and date of birth above to pull their information and begin the intake.

Image 4: Staff input the applicant's first and last name and date of birth and look them up in the system to begin the intake process.

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SAN FRANCISCO HUMAN SERVICES AGENCY Intake Form Assistant jsmith - Downtown Office

### New Intake

16 FIELDS PREFILLED 1 DATA SOURCES 0 FIELDS CORRECTED

First Name \* Last Name \* Date of Birth \*

Magdalena Esposito 01/01/1970

Look Up

#### Personal Information Prefilled

First Name: Magdalena (Source: Medi-Cal)  
Last Name: Esposito (Source: Medi-Cal)  
Pronouns: She/Her (Source: Medi-Cal)  
Date of Birth: 01/01/1970 (Source: Medi-Cal)  
Street Address: 1234 Oak Street, Apt 5B (Source: Medi-Cal)  
City: San Francisco (Source: Medi-Cal)  
State: CA (Source: Medi-Cal)  
Zip Code: 94110 (Source: Medi-Cal)  
Phone Number: (415) 555-0147  
Email Address (Optional): email@example.com

#### Race, Ethnicity & Identity Prefilled

Ethnicity: Hispanic/Latino (Source: Medi-Cal)  
Language Spoken at Home: Spanish (Source: Medi-Cal)  
Race (select all that apply):  
 American Indian/Alaskan Native  
 Asian  
 Black/African American  
 Native Hawaiian/Other Pacific Islander  
 White (Source: Medi-Cal)  
Gender Identity: Female (Source: Medi-Cal)  
Sexual Orientation: Straight/Heterosexual (Source: Medi-Cal)

**Image 5:** The system pulls the applicant’s records from Medi-Cal. Personal information, demographics, and income data are all prepopulated. Fields with a teal background come from Medi-Cal. Fields with a gray background are locked because they are derived directly from the source record.

**Personal Information** Prefilled

First Name: Magdalena (Source: Medi-Cal)  
Last Name: Esposito (Source: Medi-Cal)  
Pronouns: She/Her (Source: Medi-Cal)  
Date of Birth: 01/01/1970 (Source: Medi-Cal)  
Street Address: 1234 Oak Street, Apt 5B (Source: Medi-Cal)  
City: San Francisco (Source: Medi-Cal)  
State: CA (Source: Medi-Cal)  
Zip Code: 94110 (Source: Medi-Cal)  
Phone Number: (415) 555-0146 (Edited) (Reset to Medi-Cal source)  
Email Address (Optional): email@example.com

**Race, Ethnicity & Identity** Prefilled

Ethnicity: Hispanic/Latino (Source: Medi-Cal)  
Language Spoken at Home: Spanish (Source: Medi-Cal)  
Race (select all that apply):  
 American Indian/Alaskan Native  
 Asian  
 Black/African American  
 Native Hawaiian/Other Pacific Islander  
 White (Source: Medi-Cal)  
Gender Identity: Female (Source: Medi-Cal)  
Sexual Orientation: Straight/Heterosexual (Source: Medi-Cal)

**Image 6:** If information in a field is corrected by the client, such as a phone number, it displays with an amber background and is labeled “Edited.” Staff can reset edited fields back to the Medi-Cal-generated value with a single click.

**Family Size, Income & Certification** Prefilled

Family Type: Single Headed Family (Source: Medi-Cal)  
Family Size: 4 (Source: Medi-Cal)  
Estimated Income (next 12 months): \$32,400 (Source: Medi-Cal)  
Income Level: Extremely Low Income (Auto-calculated from family size and income)  
Income Verification Source:  
 Payroll Stub  
 Tax Return  
 Unemployment Benefits  
 Veteran's Benefits  
 Public Benefits (Medi-Cal)  
 Rental Assistance  
 Self-Certified  
Please explain...

**Applicant Confirmation & Signature**

By signing below, I acknowledge the information provided is true and correct and consent to sharing it for workforce services enrollment.

**Image 7:** Income level is auto-calculated from family size and income, so staff do not need to look it up manually. Once all the information is verified, the applicant signs directly on the screen. As soon as they sign, the “Submit” button is activated.

The screenshot shows a web form titled "Family Size, Income & Certification" with a "Prefilled" label in the top right. The form is divided into three main sections: "Family Type", "Family Size", and "Income Verification Source".

- Family Type:** A dropdown menu is set to "Single Headed Family". Below it, the source is noted as "Source: Medi-Cal".
- Family Size:** A text input field contains the number "4". Below it, the source is noted as "Source: Medi-Cal".
- Estimated Income (next 12 months):** A text input field contains "\$32,400". Below it, the source is noted as "Source: Medi-Cal".
- Income Level:** A dropdown menu is set to "Extremely Low Income". Below it, a note states "Auto-calculated from family size and income".
- Income Verification Source:** A list of checkboxes includes:
  - Payroll Stub
  - Tax Return
  - Unemployment Benefits
  - Veteran's Benefits
  - Public Benefits (Medi-Cal)
  - Rental Assistance

A modal overlay is centered on the screen, featuring a green checkmark icon and the text "Intake Submitted". Below this, it reads "Magdalena Esposito — Workforce Services Intake" and "Submitted 3/14/2026 at 11:58 AM". A blue button labeled "Start New Intake" is positioned at the bottom of the modal. A hand-drawn signature is visible in the background of the modal.

Below the modal, the form continues with the "Applicant Confirmation & Signature" section, which includes a checkbox for "By signing below, I acknowledge the..." and a "Clear" button. At the bottom of the form, a large blue button labeled "Submit Intake" is visible, with a mouse cursor hovering over it.

That’s it! The intake is submitted and staff can immediately begin the next one. What used to be a full data entry process is now a quick verification process.

If you’d like to learn more, see the full project, including a policy brief explaining the leaders’ core recommendations, at [aspenpolicyacademy.org/project/sf-jobsnow-intake-2026](https://aspenpolicyacademy.org/project/sf-jobsnow-intake-2026).



Photo by William Bout



## About the Tech Executive Leadership Initiative (TELI)

This project was completed as part of TELI, a partnership between the Aspen Institute’s Policy Academy and the Tech Talent Project. TELI is a multiweek skills-building initiative that prepares experienced technology leaders to engage effectively with public sector challenges. Learn more at [aspenpolicyacademy.org/teli](https://www.aspenpolicyacademy.org/teli).