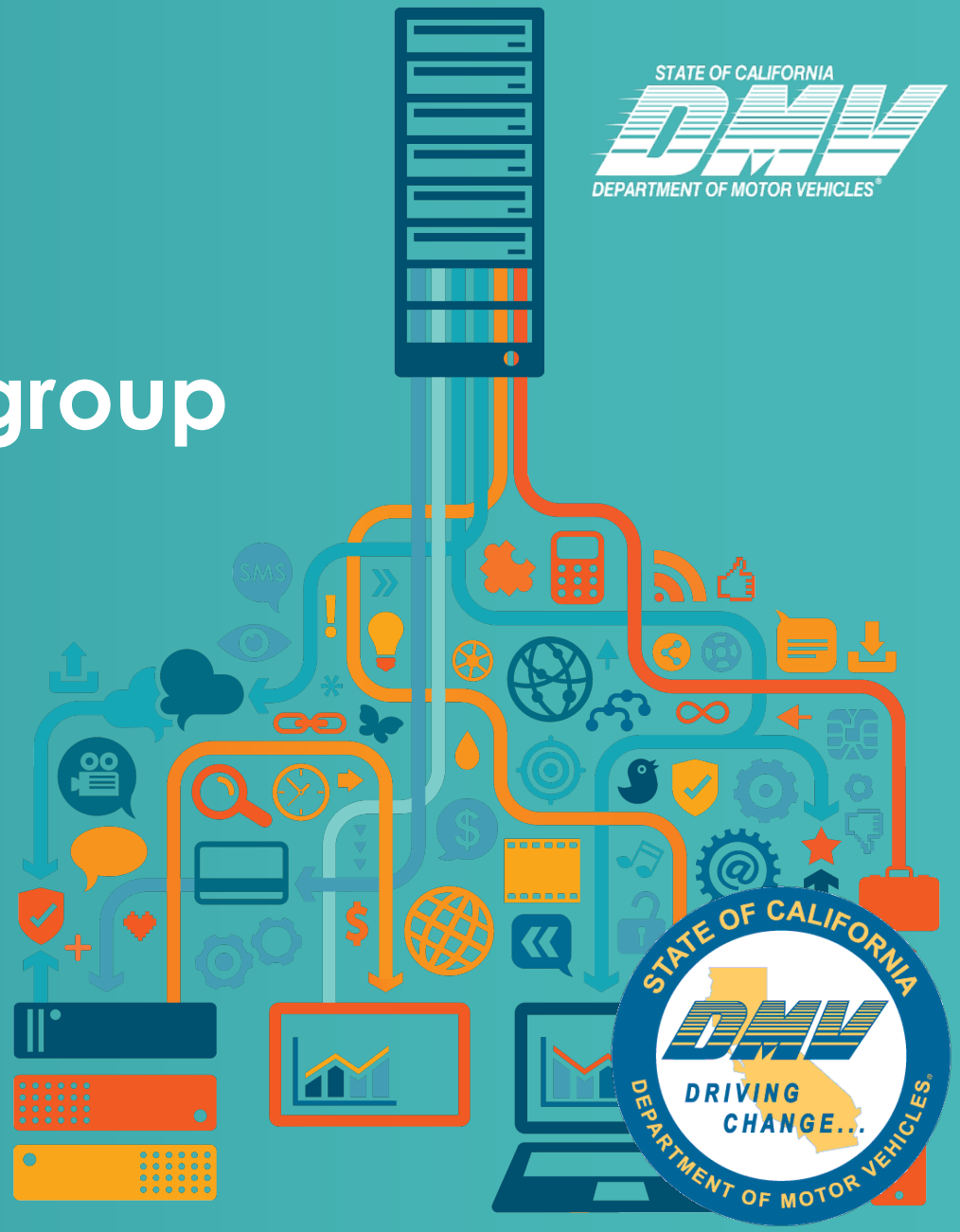
State of California

Intelligent Automation Workgroup



Sharing our IA journey

DMV, CDPH, DHCS, FI$Cal, Energy, DOT, EDD, JCC, Wildlife, CalPERS, CDT, CHP, CoveredCa, SCO, DGS, DOR, CalSTA, SCIF, HCAI, NV DMV, NASA, UC DAVIS

February 6, 2026

Agenda

- Welcome (5 mins)
- Roundtable introductions and topic collection (15 mins)
  - CDPH – Highlight RPA Successes (10 mins)
  - DHCS – Highlight RPA Successes (10 mins)
- DMV updates – (20 mins)
  - New COE Website
- Intelligent Document Processing Simplified with GenAI
  - ABBYY – Document Processing (5 mins)
  - MuleSoft – Document Processing (10 mins)
- Open Discussion/Q&A (15 mins)

Objectives of this forum:

To share ideas, experiences and our Intelligent Automation journey across the State to improve operations and gain efficiencies

DMV's **Intelligent Automation** COE

Manage the technology, process and governance to support department wide intelligent automation initiatives while creating secure, reliable and repeatable implementations of robotics, AI/ML and workflow-based automation

Introductions

Role, Need, Topics of interest

DMV, **FI$Cal**, Energy, **DOT**, EDD, JCC, Wildlife, **CalPERS**, CDT, CHP, **Covered Cal**, **SCO**, DGS, ***DOR***, **CalSTA**, SCIF, ***HCAI***, ***Nevada DMV***, **HSR**, UC Davis, **OTS,** FTB**, NASA, EY, OTSI, Rawlins IC, CDPH, DHCS,**

Public Health use cases

CDPH

Healthcare use cases

DHCS

Department of Health Care Services

Robotic Process Automation Success Stories

DHCS
CALIFORNIA DEPARTMENT OF HEALTH CARE SERVICES

January 2025

Service Now RPA Implementation

MEDS Passphrase Reset

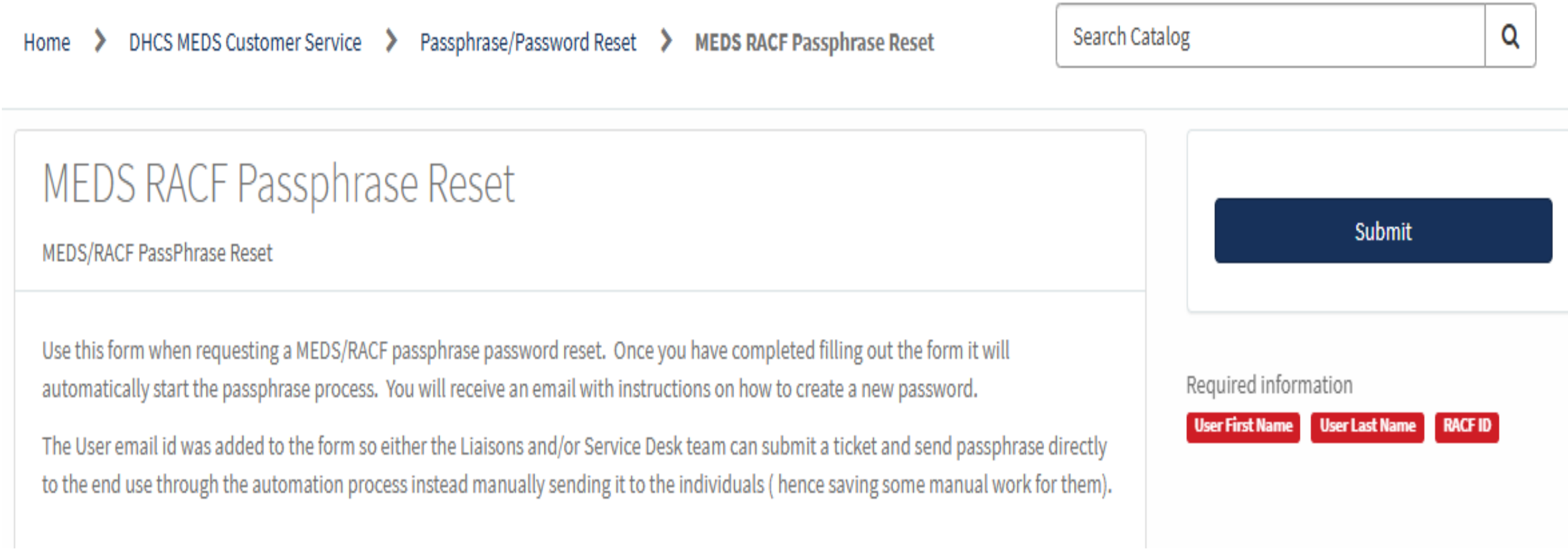
DHCS

Prior to MEDS PassPhrase Reset Process Automation

PAIN POINTS	Inbound	Inbound Handled	Avg Speed Of Answer	Handle Time	Avg Handle Time	Avg In Queue Time	Connect Rate	Abandons	% Abandons	Avg Abandon Time	Service Level
1 week prior automation	511	372	5.53	1700.32	4.57	5.73	73%	135	26%	5.69	72%

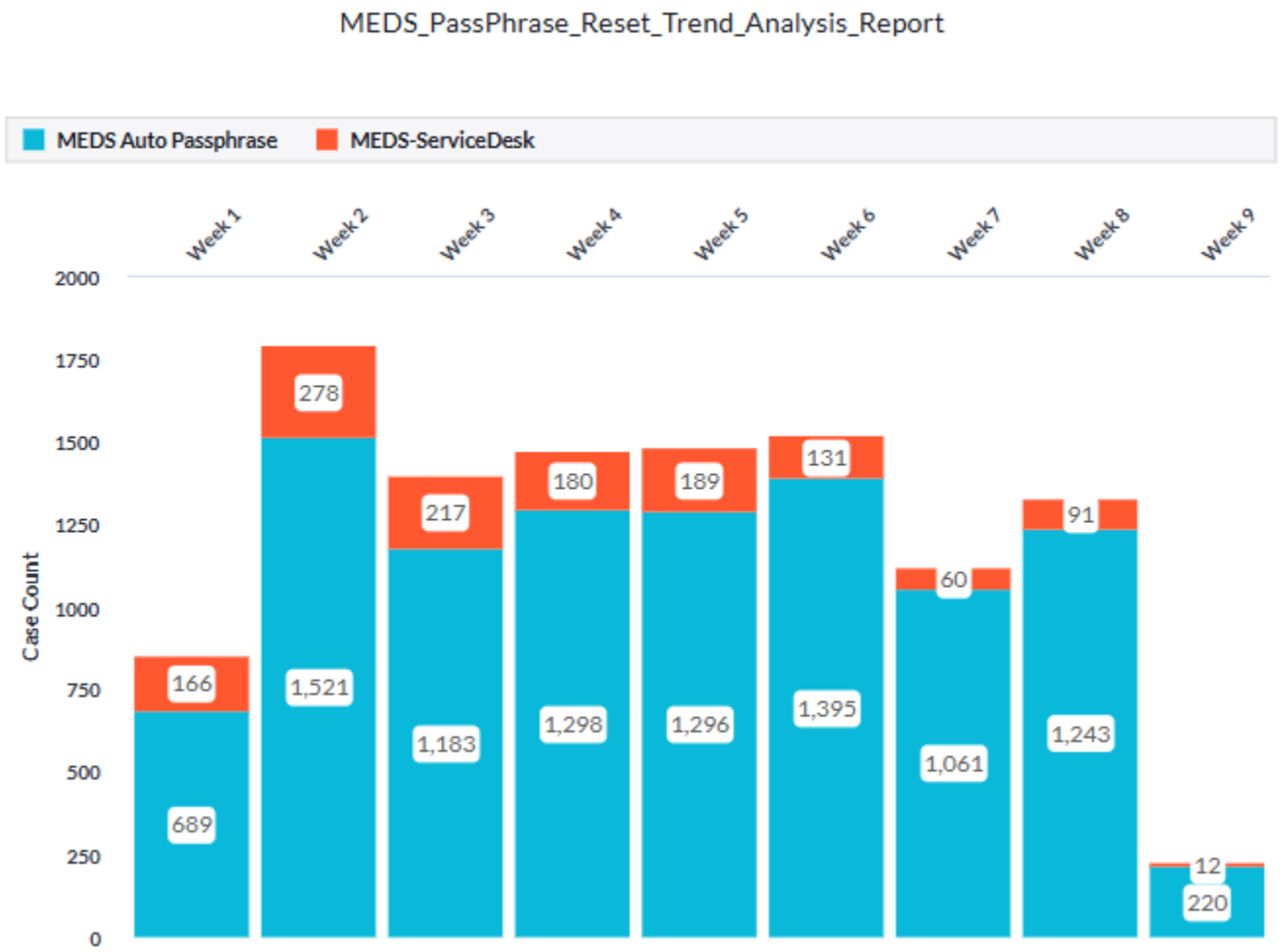
- Previously, the Service Desk was responsible for manually compiling metrics to track the performance of the outdated MEDS PassPhrase Reset processes.
- For several years, the Service Desk dedicated an estimated 4 full-time equivalents (FTE) annually to manually handle MEDS PassPhrase resets.
- Passphrases were overly generic and shared among all end users, posing a significant security risk as individuals could potentially know others' passphrases.
- Passphrases were communicated verbally to end users, introducing an additional security vulnerability.
- Users *lacked Self Service options for Passphrase Reset*.
- Liaisons from all counties in California relied heavily on the 4 FTE Service Desk staff to distribute passphrases to end users.
- End users were required to contact the Service Desk via phone or email to request passphrases.

What is MEDS Mainframe PassPhrase Automation?



Here is a trend of how effort from Service Desk has been reduced over time…..

"Reduced from 100% SD work to about 6%, freeing up at least 3 FTEs to focus on higher-value tasks such as troubleshooting and resolving real incidents."



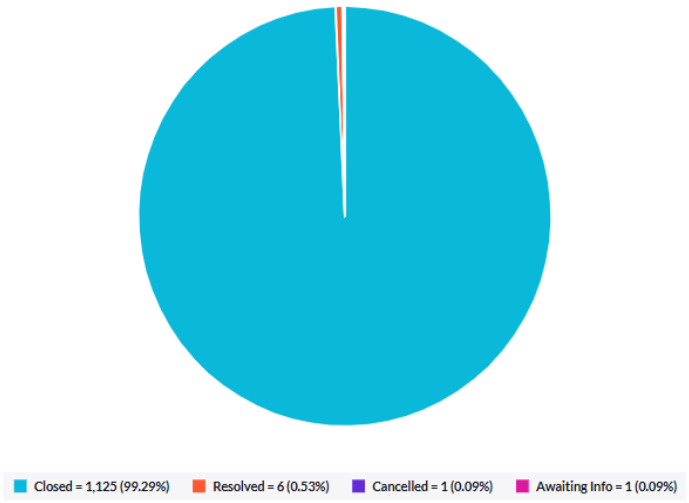
Opened	Assignment group	Case Count	Percentage of Count
Week 1 (Dec 30 2024 - Jan 6)	MEDS Auto Passphrase	689	80.58%
	MEDS-ServiceDesk	166	19.42%
Week 2 (Jan 6 - Jan 13)	MEDS Auto Passphrase	1,521	84.55%
	MEDS-ServiceDesk	278	15.45%
Week 3 (Jan 13 - Jan 20)	MEDS Auto Passphrase	1,183	84.5%
	MEDS-ServiceDesk	217	15.5%
Week 4 (Jan 20 - Jan 27)	MEDS Auto Passphrase	1,298	87.82%
	MEDS-ServiceDesk	180	12.18%
Week 5 (Jan 27 - Feb 3)	MEDS Auto Passphrase	1,296	87.27%
	MEDS-ServiceDesk	189	12.73%
Week 6 (Feb 3 - Feb 10)	MEDS Auto Passphrase	1,395	91.42%
	MEDS-ServiceDesk	131	8.58%
Week 7 (Feb 10 - Feb 17)	MEDS Auto Passphrase	1,061	94.65%
	MEDS-ServiceDesk	60	5.35%
Week 8 (Feb 17 - Feb 24)	MEDS Auto Passphrase	1,243	93.18%
	MEDS-ServiceDesk	91	6.82%
Week 9 (Feb 24 - Ma 3)	MEDS Auto Passphrase	220	94.83%
	MEDS-ServiceDesk	12	5.17%
Total		**11,230**	**100%**

Here are some statistics that can be obtained from Service Now reports and analytic tools.....

Qualitative benefit - **Visibility** –
Exceptions could be captured and provided a deeper learning for the liaisons and end uses
Passphrases and any communication to fix errors >>>>>delivered directly to end users so there is no need for someone in the middle (SSPR)

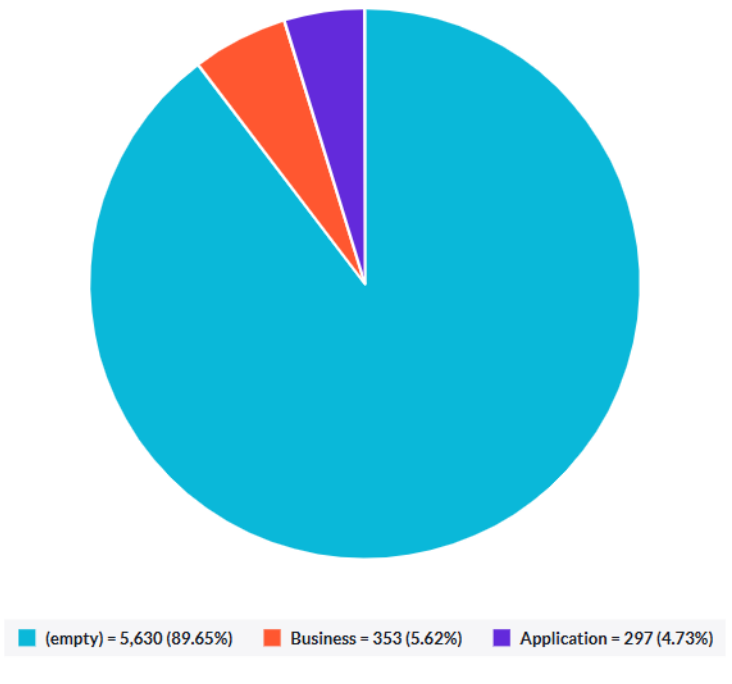
All > Users Email Address != NULL

End Users who got Passphrase delivered directly to them



State	Case Count	Percentage of Cases
Closed	1,125	99.29%
Resolved	6	0.53%
Cancelled	1	0.09%
Awaiting Info	1	0.09%
Total	1,133	100%

Distribution of cases by Exception Types

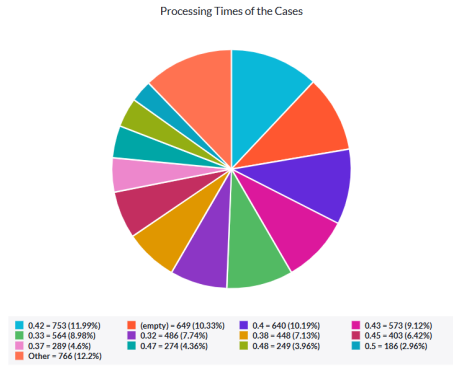


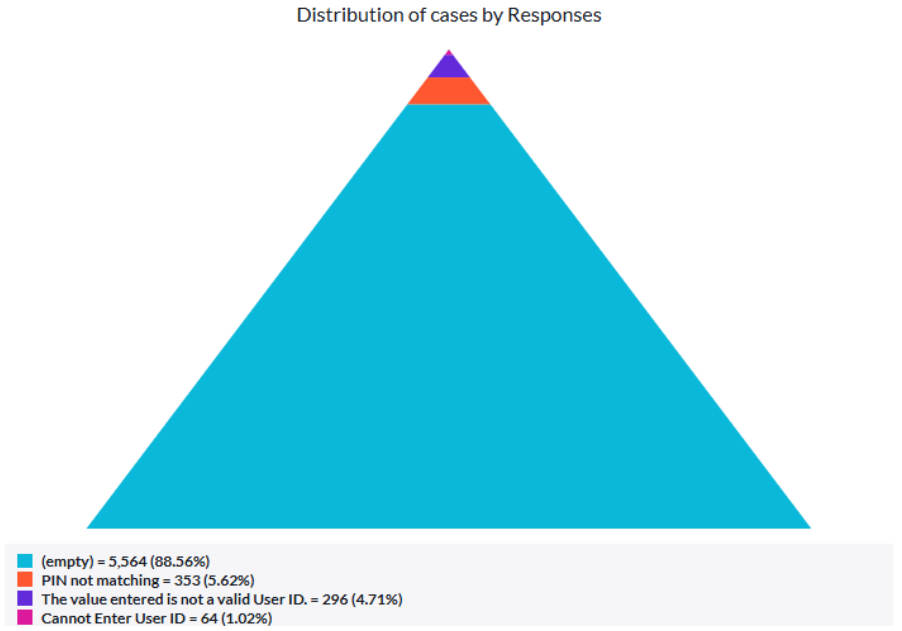
Velocity and Veracity

"Accurate processing times are now captured since no human intervention is required. As a result, most cases complete successfully within seconds—compared to the three minutes they typically took before automation."

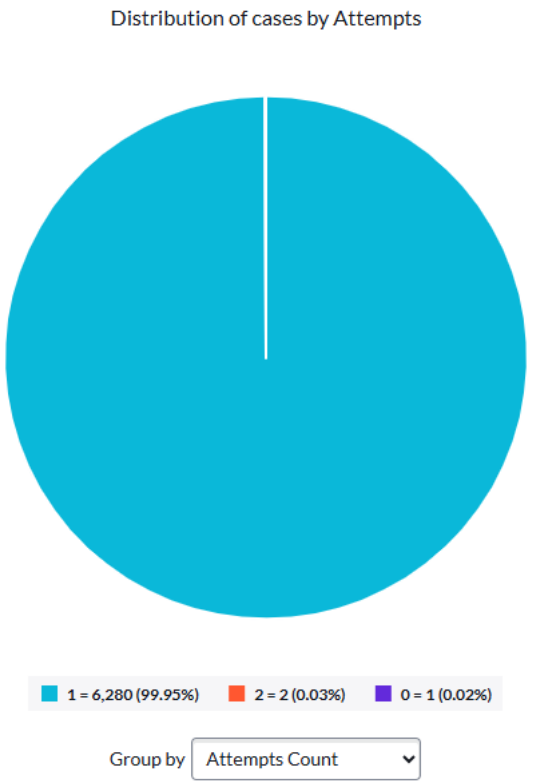
How long it took from end to end	Count of calendar_duration
> 1 min	11497.00
< 1 min	4813.00
> 3 min	1027.00
> 5 min	156.00
> hour	123.00
> .5 hour	106.00
> .25 hour	94.00
Grand Total	**17816.00**

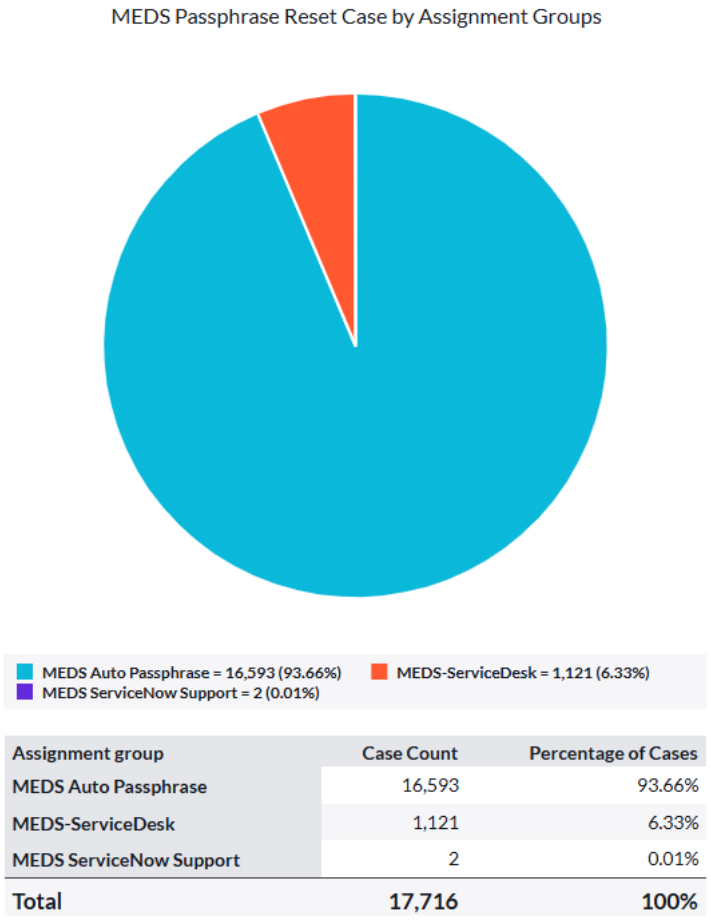






Reprocessing of suspended or abandoned cases is a possibility now with automation.....
Clear reduction in the tickets that comes to Service Desk as against taken over by the liaisons directly





Assignment group	Case Count	Percentage of Cases
MEDS Auto Passphrase	16,593	93.66%
MEDS-ServiceDesk	1,121	6.33%
MEDS ServiceNow Support	2	0.01%
Total	**17,716**	**100%**

UiPath RPA Implementation

Bank Reconciliation (Bank Recon)

Future (Skilled Nursing Facility, TPLRD Automation)

DHCS

Bank Recon Automation Success Story

Automating Fi$Cal Reporting

DHCS
CALIFORNIA DEPARTMENT OF
HEALTH CARE SERVICES

Background

- Bank Reconciliation involves recording the differences between the STO Bank Statement and our F$ Trial Balance records.
- Before automation, this process was entirely manual, especially the validation of each individual record against the bank statements—a time-consuming task that could take up to three weeks for a team of three analysts.
- This presented an opportunity to implement UiPath as our RPA solution to automate this highly repetitive and labor-intensive process.

Automation Solution

- To avoid disrupting the existing business process, which depended heavily on the generated reports, we determined that Robotic Process Automation (RPA) was the most effective automated solution available at that time.
- We deployed the RPA-based solution to replicate all repetitive manual tasks, including more complex functions such as data validation (also known as reconciliation).
- The automation captured the users' current workflow by recording each step and transformed it into a practical solution that fully automated the end-to-end Bank Reconciliation process, allowing users to operate hands-free.

Benefits & Outcomes

- Significant time reduction: from weeks to hours
- Enhanced resource efficiency: lower FTE workload
- Ability to scale with future expansion
- Increased accuracy and adherence to compliance standards

DHCS Automation Future

The implementation of automations like MedsPassPhrase Reset and Bank Recon has allowed DHCS to establish effective RPA Frameworks, leveraging ServiceNow and UiPath as the main RPA platforms. These initiatives have significantly advanced DHCS's Automation Journey…

Test Automation Framework – Service Now

Skilled Nursing Facility – UiPath

TPLRD Automation - UiPath

DHCS
CALIFORNIA DEPARTMENT OF
HEALTH CARE SERVICES

Questions?

Email Vijay.venkataramani@dhcs.ca.gov
Sruthi.Gottipati@dhcs.ca.gov
Vijayalaxmi.Daaram@dhcs.ca.gov

DHCS

DMV Update

Annual Automation Stats (2025)

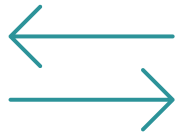
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DMV
Department of Motor Vehicles



53

Use Cases in Production



> 7.3M

Transactions Processed



> 2.94M

Sheets of Paper Saved



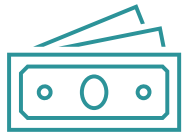
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AI / ML Use Cases



> 352k

Tech Hours Saved



> $15.5M

Cost Avoidance

Automation Stats since inception

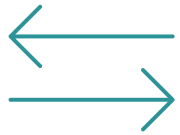
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72*

Use Cases in Production



> 22.5M

Transactions Processed



> 9.94M

Sheets of Paper Saved



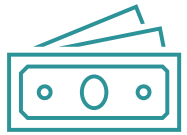
4

AI / ML Use Cases



> 806k

Tech Hours Saved

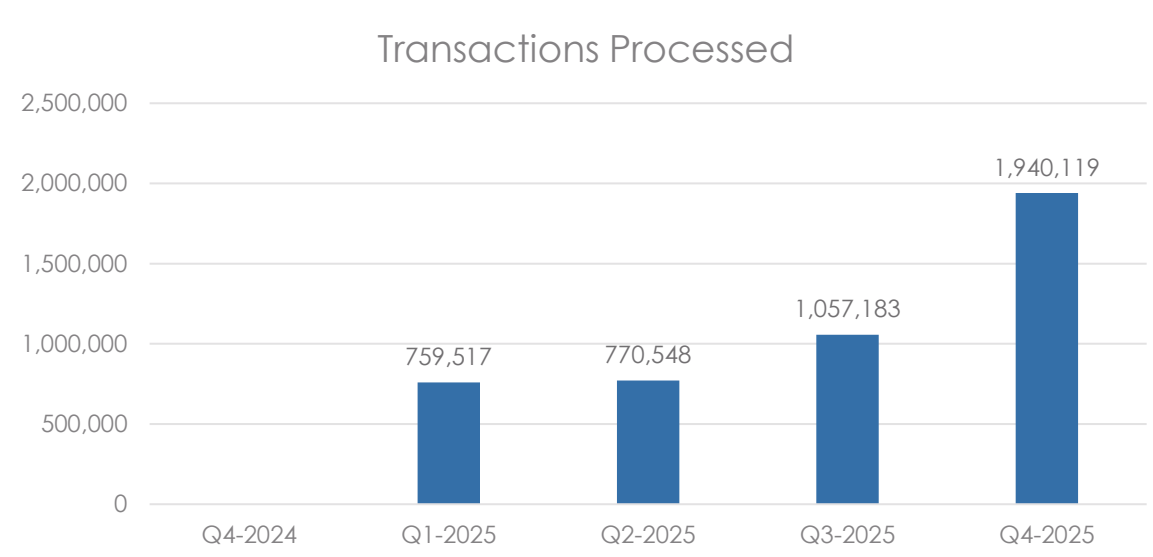


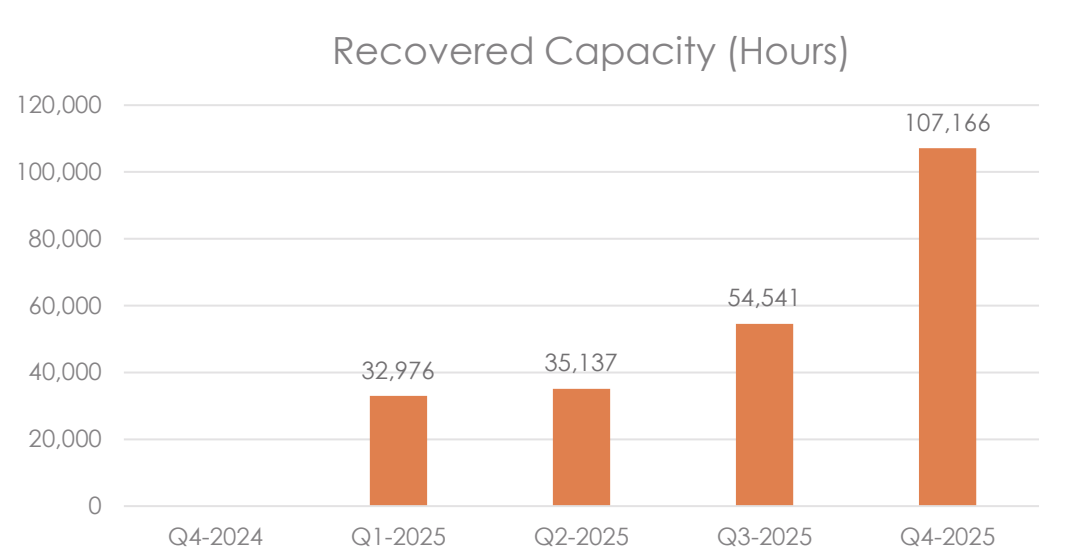
> $36.1M

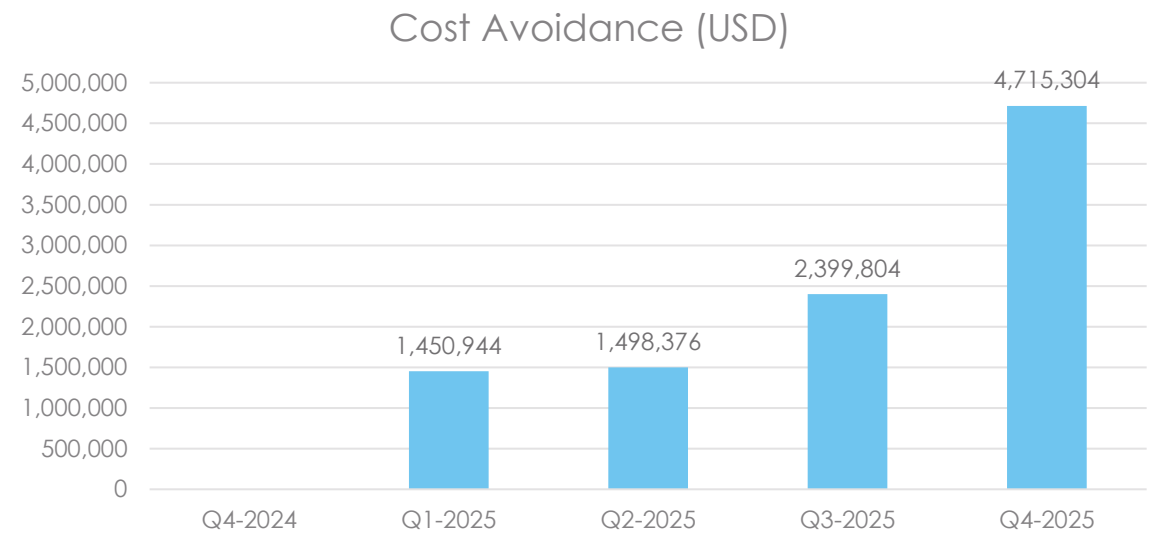
Cost Avoidance

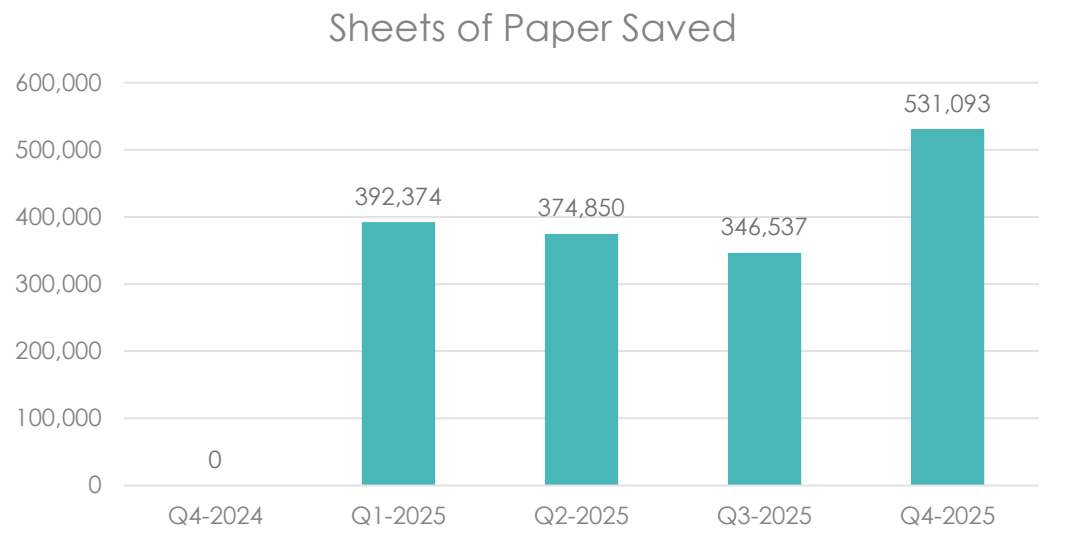
* 12 use cases end of life/fully realized

Quarterly Automation Statistics

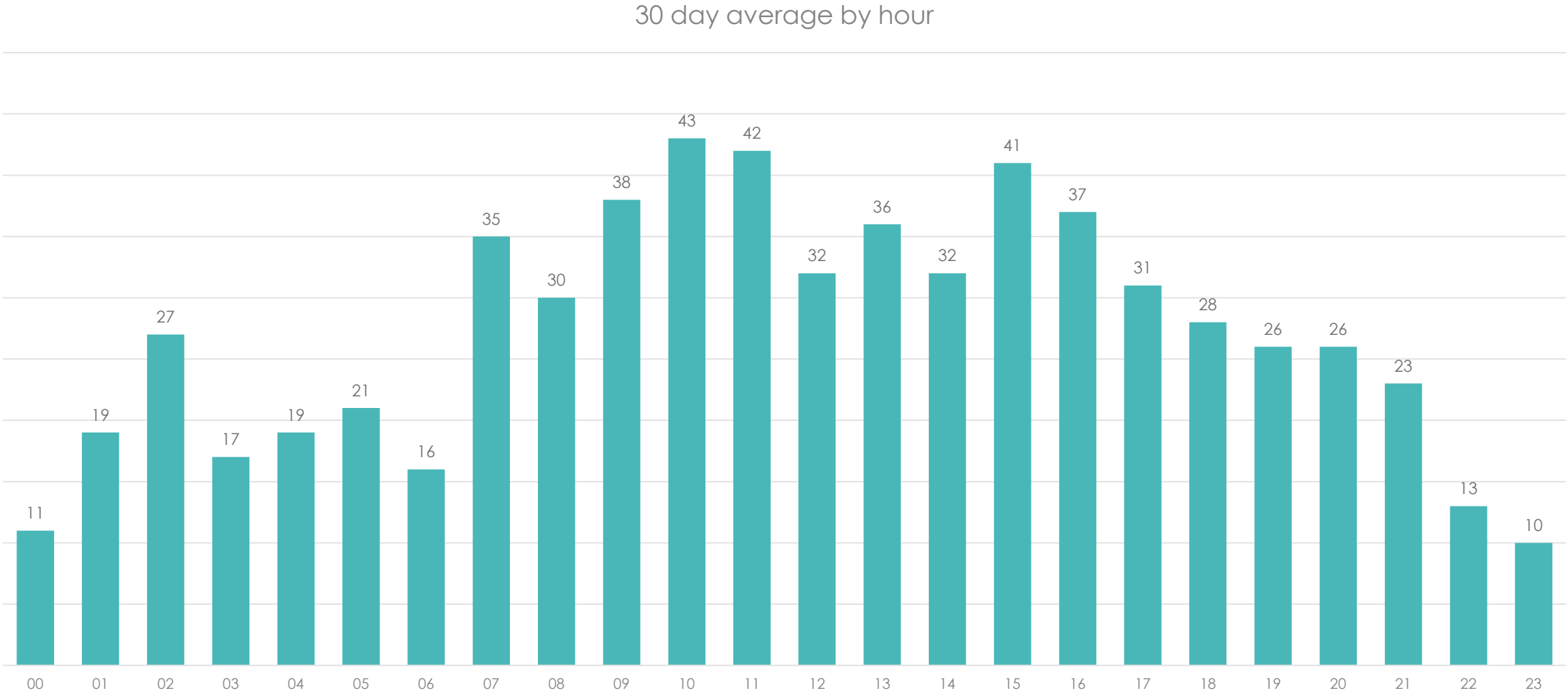






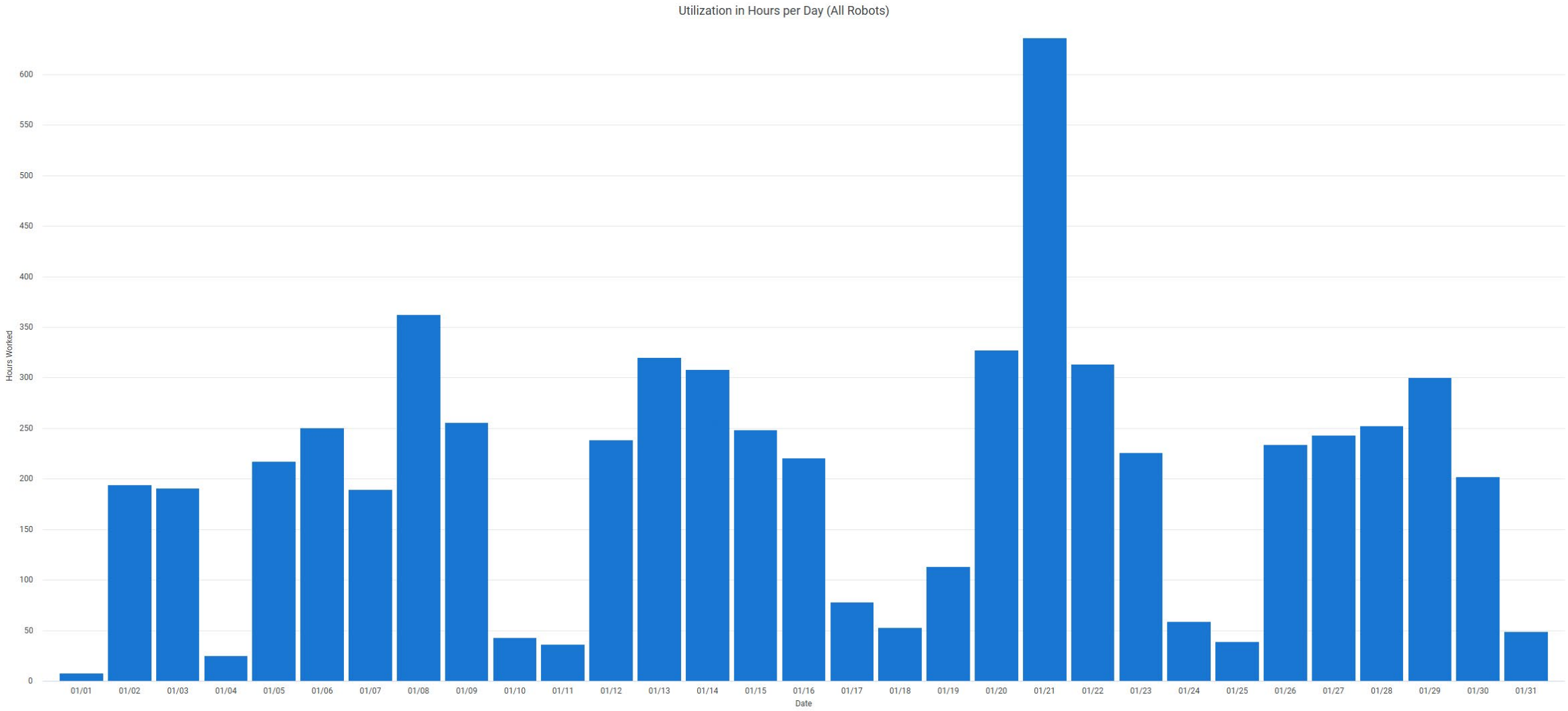


Automation bots at work



* Data current as of 1/31/2026

Bot Hours/day (January 2026)



* Data range 1/1/2026 – 1/31/2026

AG

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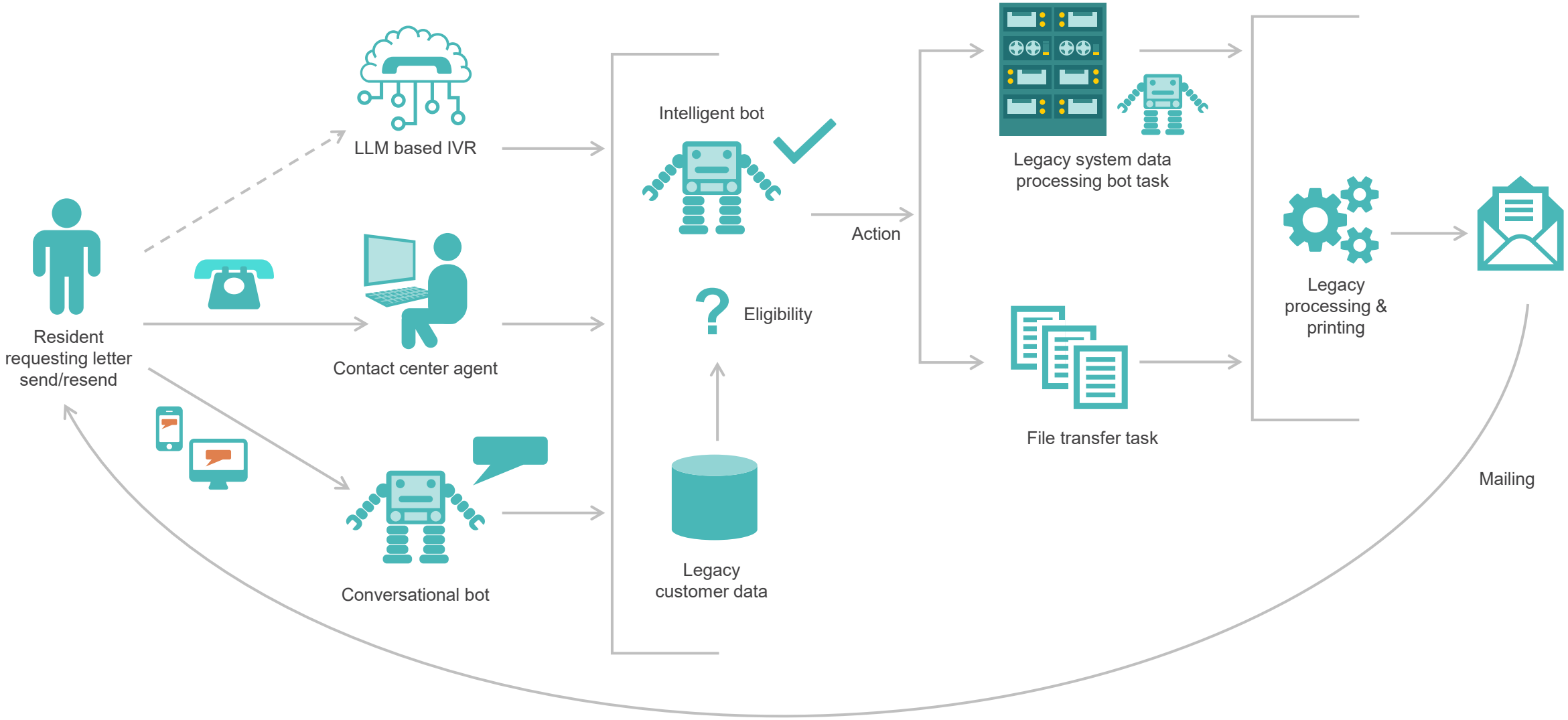
New design patterns

Previously shared bot patterns: Web Bots with Workflow Engines and Payment Processing, Intelligent Document Processing/Decision Bots with AI Augmentation, Legacy Integration Bots, Contact Center Bots, Batch Processing/Queue Bots, Long Running Workflow Bots, Human-in-the-loop workflows (Secure credentials / MFA)..

Statewide reuse cases: State Controller's Office Time Reporting, HR Employee Accounts Receivable, CalHR ECOS/eRecruitment, Identity / Account Recovery Bots

AND NOW.. Omnichannel UI Integration Bots

Omni Channel Integration Bot Pattern



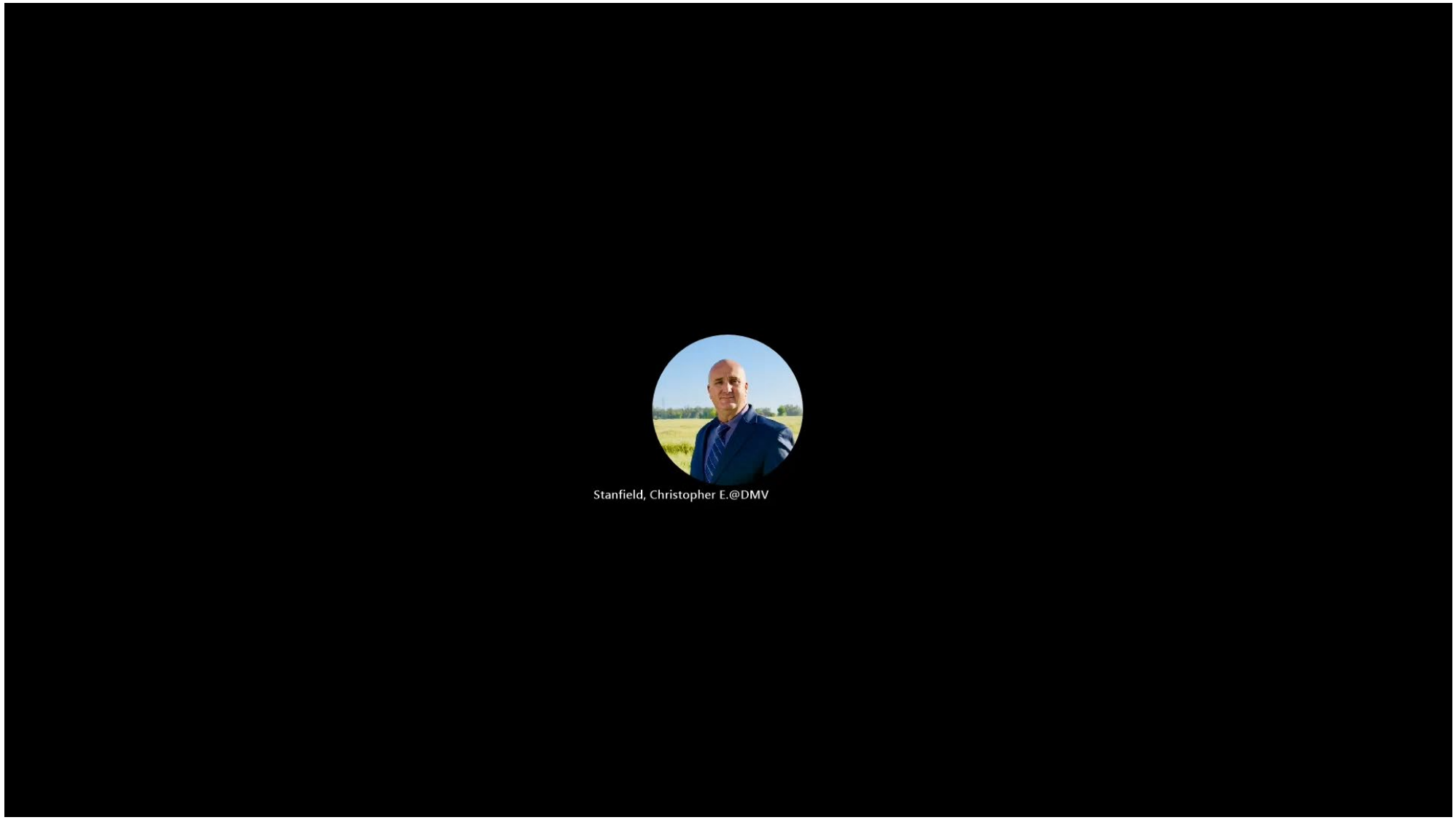
Intelligent Automation Community

STATE OF CALIFORNIA
DMV
Department of Motor Vehicles

Website Tour

California Intelligent Automation COE

Intelligent Document Processing - ABBYY



Intelligent Document Processing - GenAI

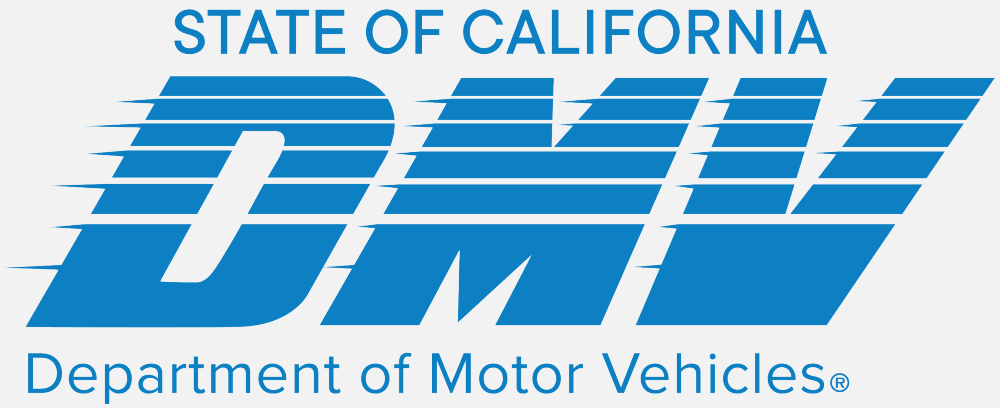
- Mulesoft Live Demo

Open discussion

What's New? - Roundtable

Latest trends, upcoming opportunities, possible needs, Topics of interest

DMV, **FI$Cal**, Energy, **DOT**, EDD, JCC, Wildlife, **CalPERS**, CDT, CHP, **Covered Cal**, **SCO**, DGS, ***DOR***, **CalSTA**, SCIF, ***HCAI, Nevada DMV***, **HSR**, UC Davis, **OTS,** FTB**, NASA, EY, OTSI, Rawlins IC, CDPH, DHCS,**



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