Baby Steps in Artificial Intelligence (AI): A Case Study of The County of Monterey

Lakisha Brown-George, MBA

QAQI Program Support Analyst, Adult Protective Services

City and County of San Francisco Human Services Agency

Executive Summary

The County of Monterey Department of Social Services Adult Protective Service (APS) Program has been exploring the use of artificial intelligence (AI). This case study explores how San Francisco Human Service Agency (SF HSA) APS program may also find AI helpful given increasing demand for services. This paper discusses the potential benefits and considerations associated with AI implementation, including the importance of maintaining confidentiality, professional judgment and compliance with policies and regulations.

The result of this research supports continued exploration and cautious adoption of AI tools within the SF HSA APS program to create templates for case notes and auto populate case documents. This paper discusses information gathered from the County of Monterey and San Francisco County that suggests that AI may provide meaningful administrative and documentation support for the APS department when implemented with appropriate safeguards, and staff training, and ongoing oversight.

Introduction

Adult Protective Services (APS) social workers investigate allegations of abuse, neglect and exploitation involving seniors and dependent adults. With an aging population, the APS program is challenged with the number of reports and the complex nature of the reports received. Due to chronic understaffing and high caseloads, the County of Monterey APS program is actively exploring methods to streamline workload demands and improve efficiency, while standardizing the delivery of support service.

Background

The County of Monterey Department of Social Services has approved its APS unit to pilot the use of Microsoft Copilot Chat to summarize notes. San Francisco County approved guidance in July 2025 allowing all staff to utilize Copilot Chat for City use. Staff were advised to avoid AI tools that are not formally vetted and never enter sensitive data. However, APS has not discussed the use of AI with the Protective Social Workers or a date they can begin using the software for work (San Francisco Human Services Agency, 2025).

The County of Monterey APS unit is exploring options to invest in software that supports workers by integrating the information directly into standardized templates, such as the Risk Assessments, to improve consistency, efficiency and quality of documentation. Risk Assessment is an important tool used to assess clients and one of the most time-consuming components of APS investigations.

It would be beneficial to further evaluate these outcomes to determine whether AI-supported documentation tools should become a standard or mandatory resource within APS and potentially expand to other programs across the Aging and Adult Services Branch. A comparative analysis could be conducted using Quality Assurance (QA) reports to measure documentation quality and timeliness before and after implementation of Copilot use among social workers.

The Use of Artificial Intelligence

Current Usage

The County of Monterey APS unit currently uses artificial intelligence (AI) as a support tool to highlight key points and identify action items, themes or trends. Staff shared that AI provides detailed explanations and reasoning from the data entered, which can be especially helpful in complex cases where multiple factors must be considered. The use of AI does not replace the

professional judgment or decision-making responsibilities of the social worker; rather, it serves as a tool to help validate and support decisions that workers may already be considering.

Staff report that the use has been helpful in identifying possible follow-up questions that can strengthen assessments and improve the quality of interviews and case notes.

In addition, AI has assisted in developing local resource lists for clients. This is particularly useful when workers are not familiar with all available services in a specific geographic area. AI helps generate localized resource options so that workers are not limited to referring clients only to agencies or providers they already know, which may not always be conveniently located for the client. As with all resources, workers must still verify that agencies, vendors, and service providers are currently operating and available. However, AI can significantly improve the efficiency of identifying potential supports and services that may meet a client's needs.

Zoom AI is used to generate the staff meeting minutes. There are three to four pages of notes almost instantly generated after a meeting and within 10 minutes of reviewing and editing, the minutes are complete and ready to be distributed.

Choosing Artificial Intelligence Software

Some of the AI tools explored include:

- MS Copilot Chat, which is an AI tool included with Microsoft 365 subscriptions, and often referred to as the "free" version, since there is no additional cost to use it.
- MS Copilot Chat G3, which is included at no extra charge for users with eligible Government Community Cloud (GCC) licenses. It runs in a secure government cloud environment, so that anything type or uploaded is protected by the agency's security and compliance controls.
- Magic Notes, which is an AI tool designed for case workers to automatically record conversations and generate structured summaries. It requires reliable technology and internet access, and may raise privacy concerns.
- Bring Your Own Device (BYOD) Free Tools, which do not have a cost, but carry a high-risk level and are, therefore, discouraged.

Table 1: A summary of a tiered risk assessment approach to AI Tools

Option	BYODFree Tools	Copilot Chat G3	M365 Copilot
PII Allowed	No	No	Yes
Context Aware	No	Limited	Full MS Data
Cost to Organization	$0 (Staff pays)	$0	$360/user/yr limited rollout
Risk Level	High	Medium	Low
Recommendation	Discourage	General Use	Sensitive Work

(Plasencia, 2026)

The table above shows that MS Copilot uses a tiered approach to AI. Copilot Chat G3 is the version of AI that is available to all San Francisco employees, free of charge. It has medium risk but it does not allow personal identifiable information (PII). With the Microsoft 365 Copilot Tier, personal identifiable information (PII) is allowed. The cost is approximately $360.00 per year per user. Due to lower risk levels, it is the recommended version, if Copilot use is continued.

Future AI Elements and Capabilities

Ideally, the future version of AI will include the ability to create templates that will automatically populate with the data entered. Data including the client's name, date of birth, ethnicity, age, SOGI, disabling conditions and risk factors are currently entered into individual parts of a database. Software can take information dictated by an APS worker which is then used to populate the appropriate templates and forms.

Templates can include the:

- Risk assessment
- Needs assessment
- Initial face to face interview notes

Completing the administrative work after an initial visit can take 30 minutes to two hours depending on the complexity of the case and the number of allegations that were investigated. Using an AI supported documentation tool would improve efficiency by reducing the completion time to approximately 10 minutes. The worker would primarily need to review and edit forms for accuracy before transferring the completed templates into the appropriate software and or printing forms for distribution.

AI Successes

Early observations indicate that the County of Monterey's APS Program has seen a huge improvement with the use of AI, both in the quality and timeliness of APS documentation despite heavy caseload demands. The supervisors have reported that the investigation findings narratives are well written, easier to read and the findings determinations are accurate. Supervisors are finding fewer errors when reviewing cases, for the workers that utilize AI.

AI Obstacles

One of the greatest obstacles identified is that the California Department of Social Services (CDSS) has been silent on the use of AI. Currently, there are no formal All County Letters (ACLs) or Management Bulletins providing guidance or authorization for AI use in APS practice. As a result, agencies may face financial risks if they invest in software that is later determined to be noncompliant or unsupported by CDSS. Although CDSS is aware that many agencies are interested in exploring AI tools, the department has not yet issued a formal position or guidance on the matter.

Another challenge involves the limited transparency from AI vendors regarding their work with other public agencies. One of the primary AI companies explored, Magic Notes, conducted a presentation for the Monterey staff; however, during the presentation, the company was unable to provide information about other agencies in the United States currently using its platform. The company appears to have a stronger presence in the United Kingdom. It was also noted that Magic Notes is reportedly under contract with Los Angeles County, although the outcomes and effectiveness of that implementation have not yet been determined.

There are meaningful security and compliance concerns associated with the use of AI tools. While they are not unsafe by default, it is important to understand the limits. If staff were to use platforms, it may create risks related to unintended data exposure and noncompliance with confidentiality and information security standards. Additional concerns include AI-generated content being produced without sufficient oversight or quality controls, which may result in inaccurate information, biased responses, loss of context, or "hallucinations" generated by the AI system.

From a data protection standpoint, there are also concerns regarding the potential exposure of personally identifiable information (PII), vulnerabilities related to system integrations, and the possibility of exploitation. Improperly configured AI chatbots or systems could inadvertently disclose confidential information or provide responses outside the intended scope of use. These risks highlight the importance of establishing clear policies, security protocols, oversight measures, and approved-use guidelines before broader implementation of AI tools within APS programs, as is done in the County of Monterey.

San Francisco AI Adoption

The newest mayor of San Francisco, Daniel Lurie, is committed to bringing AI to the forefront of government operations. From the beginning, Mayor Lurie had Sam Altman, Founder of Open AI, serve on his transition team and he told voters that he would bring technology companies and workers back to San Francisco with a focus on AI (Johnson, 2024).

The mayor has an innovation department that focuses on AI, and the City and County of San Francisco has established itself as a global hub for artificial intelligence. AI has been integrated within the City and County, resulting in conducting "proof of concept" with AI in some of the Human Services Agency divisions. For example, Medi-Cal and CalFresh San Francisco Benefit Network (SFBN) concluded a pilot with Magic Notes at the end of April 2026. The IT Manager shared that the plan is to move forward by giving all eligibility workers access to Magic Notes. It can summarize calls, copy and paste in various languages, including live translation in Spanish and Russian.

"Proof of concept" activities focused on increasing the accuracy of case notes with inbound and outbound calls. Twenty-seven eligibility workers were responsible for clicking on the record button, choosing the template that best described the nature of their call (i.e. recertification, intake) and having a conversation, asking the pertinent questions of the client. Once the call was complete the templates were automatically generated with the information from the call. Workers in SFBN had the opportunity to review and edit the templates which saved a significant amount of time. Further, if information was missing, a worker could see the additional information needed for the case. Prior to "proof of concept" with Magic Notes, San Francisco's call center model included recording the calls, therefore the adoption of Magic Notes was easily received in San Francisco County.

In July 2026, The CalWORKs Department and CAAP Departments of San Francisco County are scheduled to pilot AI in CalSAWS, the California Statewide Automated Welfare System used in all 58 Counties. According to The Little Hoover Commission (2025), the initiative focuses on leveraging AI for tasks like summarizing case notes, improving worker efficiency, and streamlining access to public benefits. I met with the San Francisco AI team and learned that the

CalSAWS system has an AI function already embedded in the software. Workers will be able to record and get a transcript of the call, create a journal, edit and save it as part of the case. Languages can be converted to English or Spanish.

Also, the Department of Family and Children and Services will be using Allegheny Family Screening Tool (AFST) beginning October 2026.

San Francisco Adult Protective Services Division could benefit with the administrative support that would come with using an AI tool to dictate the findings of their home visit. It can create interview notes, and build templates to help complete mandatory forms, which will allow them to spend more time in the field responding to reports of abuse for the vulnerable older adults and disabled adults of San Francisco.

Conclusion

The County of Monterey and San Francisco County are approved to use Microsoft 365 Copilot Chat. Similar to the County of Monterey, San Francisco County APS workers may benefit from an AI tool that could be used to help with completing templates. This would decrease the amount of time used to write case notes and complete assessments. At this time, San Francisco workers are not utilizing AI to help support the efforts of completing their work. Although Microsoft 365 Chat is an option that the County of Monterey uses, it is my recommendation to work with the San Francisco AI IT Team to schedule time to discuss the Magic Notes with the APS Admin Team. APS can begin developing templates appropriate for the program and set a start date for a group of workers to begin proof of concept with the Magic Notes AI tool. The proof of concept with Medi-Cal and CalFresh Departments in Francisco County worked well and will be rolled out to the rest of the eligibility workers.

Overall, the exploration of using AI can be very beneficial within APS and other DAS programs to support the increased workloads. San Francisco APS workers receive 5-8 cases per week. Less time spent completing paperwork will give the field workers an opportunity to spend more time in the field responding and investigating reports of abuse. The work conducted by the social workers is very important and use of Magic Notes can serve as a helpful tool that can support the work conducted by the APS workers.

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