# 2014 - BIENNIAL REPORT TO THE LEGISLATURE

## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDD VISION</td>
<td>1</td>
</tr>
<tr>
<td>EDD MISSION</td>
<td>1</td>
</tr>
<tr>
<td>EDD GOALS</td>
<td>1</td>
</tr>
<tr>
<td>INFORMATION TECHNOLOGY BRANCH (ITB) VISION &amp; MISSION</td>
<td>2</td>
</tr>
<tr>
<td>ITB STRATEGIES</td>
<td>2</td>
</tr>
<tr>
<td>EDD PROJECT SUMMARY</td>
<td>3</td>
</tr>
</tbody>
</table>
Beginning in 1994, the California Unemployment Insurance Code Section 4901, requires the director of the Employment Development Department (EDD) to prepare and submit a biennial report to the Legislature, on or before February 1 of each even-numbered year.

The report shall include the department's automation plans, including any recommendation on improvements for the purpose of consideration by both policy and fiscal committees of the Legislature. The report shall provide a strategic information plan that describes the long-term goals and strategies which shall be undertaken by the department to create an information technology (IT) environment that will not only support the achievement of the department's strategic business mission and goals but set the foundation for using information technology to make substantial and sustainable improvements in how it conducts business.

EDD VISION

The EDD strengthens the economic vitality of Californians and their communities.

EDD MISSION

The EDD enhances California’s economic growth and prosperity by collaboratively delivering valuable and innovative services to meet the evolving needs of employers, workers, and job seekers.

EDD GOALS

The following section contains EDD’s five Strategic Goals. See the section titled STRATEGIC & TACTICAL PROJECT DETAILS for a description of the projects that support our short-term and long-term strategies.

GOAL I: Fiscal Stewardship
Responsibly manage our public resources and align investments with strategic goals.

GOAL II: Skilled Workforce
Build a highly-skilled and responsive workforce with clear roles and responsibilities.

GOAL III: Sustainable Operations
Align system operations, administration, resources, and business processes with strategic priorities and budgetary parameters.

GOAL IV: Enabling Innovation
Invest in our future by supporting appropriate business and technology solutions.

GOAL V: Responsible Service
Negotiate clear commitments with stakeholders and focus on priorities.
Information Technology Branch (ITB) VISION & MISSION

ITB VISION

The ITB will be recognized and valued for its outstanding service, commitment to excellence, and leadership in technology.

ITB MISSION

The ITB enables the EDD’s business through the successful planning, deployment, and management of technology.

ITB STRATEGIES

The ITB plays an important role in achieving EDD’s mission within EDD’s values. As a service organization, ITB exists to help our program partners make a difference for Californians.

ITB Top Strategic Objectives for 2014

1. Re-align IT service level commitments with Program Partners to match current ITB capacity.
   • Aligns with EDD GOAL I & V

2. Successfully transition State Disability Insurance (SDI) online and Continued Claims Redesign (CCR) systems into a sustainable operational mode.
   • Aligns with EDD GOAL I, II, III & IV

3. Establish and follow an IT workload governance process.
   • Aligns with EDD GOAL I & III

4. Improve teamwork within ITB and with Program Partners.
   • Aligns with EDD GOAL II & III

5. Adopt standard IT service delivery practices.
   • Aligns with EDD GOAL II & III
## EDD PROJECT SUMMARY

### COMPLETED IT PROJECTS SINCE LAST BIENNIAL REPORT

<table>
<thead>
<tr>
<th>Completed IT Projects</th>
<th>Description of Project</th>
<th>Implementation Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alternate Base Period (ABP) Project</strong></td>
<td>The ABP for determining UI eligibility was enacted by the Legislature in 2009 to allow California to claim an additional $840 million of incentive funds from the federal government. The ABP project allows unemployed persons who do not have sufficient wages in their regular base period to qualify for a UI claim, by considering wages earned in the four most recent completed calendar quarters.</td>
<td>March 2012</td>
</tr>
<tr>
<td><strong>California Workforce Services Network (CWSN)</strong> Phase 1A, CalJobs&lt;sup&gt;SM&lt;/sup&gt; replacement</td>
<td>The CWSN project will be implemented in three phases. Phase IA was successfully implemented and replaced the existing legacy systems (CalJOBS&lt;sup&gt;SM&lt;/sup&gt;) with a web based system that allows users to access the system through the Internet.</td>
<td>October 2012</td>
</tr>
<tr>
<td><strong>Disability Insurance Automation (DIA) Project</strong> (AKA: State Disability Insurance (SDI) Online)</td>
<td>This new system allows customers, medical providers, and employers to submit disability insurance claims and claim related information online and processes claims automatically based on embedded business rules.</td>
<td>October 2012</td>
</tr>
<tr>
<td><strong>Federal Unemployment Benefit Extensions</strong></td>
<td>EDD continues to respond to and implement the various Federal Unemployment Insurance Benefit Extensions as each new law is passed.</td>
<td>Continuous</td>
</tr>
</tbody>
</table>
## APPROVED AND DELEGATED IT PROJECTS

<table>
<thead>
<tr>
<th>Approved and Delegated IT Projects</th>
<th>Priority Ranking</th>
<th>Strategic Plan Connection</th>
<th>Project SFY Length</th>
<th>Approved Project Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unemployment Insurance Modernization (UIMOD)</td>
<td>1</td>
<td>3, 4, 5</td>
<td>03/04 – 13/14</td>
<td>$ 187,881,424</td>
</tr>
<tr>
<td>California Workforce Services Network (CWSN) Phase 1B and Phase 2</td>
<td>2</td>
<td>3, 4, 5</td>
<td>08/09 – 14/15</td>
<td>$ 20,142,440</td>
</tr>
<tr>
<td>Treasury Offset Program - Unemployment Insurance Compensation (TOP UIC)</td>
<td>3</td>
<td>1, 4, 5</td>
<td>13/14 – 13/14</td>
<td>$ 657,049</td>
</tr>
<tr>
<td>State Information Data Exchange System (SIDES)</td>
<td>4</td>
<td>1, 4, 5</td>
<td>13/14 – 14/15</td>
<td>$ 1,906,370</td>
</tr>
</tbody>
</table>

## PROPOSED IT PROJECTS

<table>
<thead>
<tr>
<th>Proposed IT Projects</th>
<th>Priority Ranking</th>
<th>Strategic Plan Connection</th>
<th>Project SFY Length</th>
<th>Estimated Project Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unemployment Insurance (UI) Call Center Enhancement</td>
<td>5</td>
<td>5</td>
<td>13/14 – 14/15</td>
<td>TBD</td>
</tr>
<tr>
<td>Disability Insurance Call Center Upgrade</td>
<td>6</td>
<td>2, 3, 4, 5</td>
<td>13/14 - 14/15</td>
<td>$ 690,000</td>
</tr>
<tr>
<td>Tax Call Center Upgrade</td>
<td>7</td>
<td>2, 3, 4, 5</td>
<td>13/14 - 14/15</td>
<td>$ 690,000</td>
</tr>
<tr>
<td>Benefit Overpayment Collection Automation (BOCA)</td>
<td>8</td>
<td>1, 3, 4</td>
<td>16/17 – 19/20</td>
<td>$ 9,333,000</td>
</tr>
<tr>
<td>Electronic Requester Information Abstract Services</td>
<td>9</td>
<td>1, 3, 4, 5</td>
<td>16/17 – 17/18</td>
<td>$ 750,000</td>
</tr>
<tr>
<td>Paid Family Leave (PFL) System integration into State Disability Insurance (SDI) Online Services</td>
<td>10</td>
<td>3, 4, 5</td>
<td>16/17 – 18/20</td>
<td>$ 15,002,000</td>
</tr>
<tr>
<td>Unemployment Insurance (UI) Forms</td>
<td>11</td>
<td>1, 3, 5</td>
<td>16/17 – 18/19</td>
<td>$ 5,008,000</td>
</tr>
<tr>
<td>Unemployment Insurance (UI) E-Apply Modernization</td>
<td>12</td>
<td>1, 3, 4, 5</td>
<td>16/17 – 20/21</td>
<td>$ 10,940,000</td>
</tr>
</tbody>
</table>
2014 - BIENNIAL REPORT TO THE LEGISLATURE

STRATEGIC & TACTICAL PROJECT DETAILS

<table>
<thead>
<tr>
<th>Project Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unemployment Insurance Modernization (UIMOD)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Start &amp; Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFY 03/04 – SFY 13/14</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>11 years</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Estimated Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>$187,881,424</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Related Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>none</td>
</tr>
</tbody>
</table>

Strategic Plan Connection

GOAL III: Sustainable Operations
GOAL IV: Enabling Innovation
GOAL V: Responsible Service

Project Description and Scope

The UIMOD project replaces the existing telephonic platform implementing a Voice over Internet Protocol (VoIP) and Service Oriented Architecture (SOA) which allows customers to have greater and faster access to EDD services and information.

From a program perspective, implementation of the UIMOD Project will improve service quality through the use of improved systems to assist our customers, and will help resolve current system limitations. This system will also assist with fraud detection and prevention efforts by providing additional data that can be queried in databases for potential fraudulent trends and patterns.

From a customer’s perspective, the UIMOD Project improves customer service by providing the claimant greater access to information on a self-service basis and upgrades the systems that operate the business functions. It further provides new ways for customers to certify for benefits via telephone and the Internet, and allows customers 24 hour access, seven days a week to obtain and view information online regarding their claims.

Estimated Benefits and Services Improvements

- Offers UI claimants the ability to view and manage claim information via the Internet.
- Allows for redirection of staff resources to other business functions within the UI Program.
- Allows claimants to re-open existing claims on-line via self-service functionality without EDD staff intervention.
- Reduces paper handling and associated costs and creates greater efficiencies in UI payment processes.
- Improves the Department’s ability to meet federal performance standards (e.g., first payment time lapse.)
- Improves the EDD Tele-Cert and on-line process to handle more types of claims and adds clarifying questions to determine if eligibility issues exist and reduces determination workload.
- Allows the EDD to provide announcements directly to claimants about disasters, federal extensions, etc. and allows claimants easy access to other EDD services.

Automation Projects only:

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redirection to mission critical program areas</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PY Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>165.3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
</tbody>
</table>
### Proposed Project Name
*California Workforce Services Network (CWSN)*

### Project Start & Finish
**SFY 08/09 – SFY 14/15**

**Duration**
7 years

**Project Priority**
2

### Estimated Cost
$20,142,440

**Related Projects**
None

### Strategic Plan Connection
- **GOAL III:** Sustainable Operations
- **GOAL IV:** Enabling Innovation
- **GOAL V:** Responsible Service

### Project Description and Scope
The CWSN proposed solution is an effective, web-based solution that will support integrated EDD workforce services to One-Stop Career Center customers. The EDD staff, Employment Training Panel (ETP) staff, Local Workforce Investment Area (LWIA) staff, and other One-Stop partner agency staff will use an intuitive self-service application to administer WIA and ETP programs. Partner agency staff and training providers will have access to their information at the One-Stop or through the Internet. The proposed solution will also supply enhanced access service reporting, data exchange, and security.

### Estimated Benefits and Services Improvements
- Improve services to all Californians, but especially employers, job seekers, and EDD partners. Staff will be able to assist more customers through a system that can track clients across employment programs, training programs and funding streams.
- Combine separate systems into one single unified system providing data entry efficiency, improve data integrity, and allow the State to submit a single employer and a single job seeker record.
- Reduce data center costs to help offset the vendor monthly subscription fees and reduce the risk of system failure due to unsupported technology.

### Automation Projects only:

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
Project Name
*Treasury Offset Program - Unemployment Insurance Compensation (TOP UIC)*

**Project Start & Finish**
SFY 13/14 – SFY 13/14

**Duration**
1 year

**Project Priority**
3

**Estimated Cost**
$657,049

**Related Projects**
Benefit Overpayment Collection Automation (BOCA)

---

**Strategic Plan Connection**

**GOAL I:** Fiscal Stewardship  
**GOAL IV:** Enabling Innovation  
**GOAL V:** Responsible Service

---

**Project Description and Scope**

The EDD currently requests offsets (monetary deductions) against the Federal Income Tax refunds of employers owing delinquent EDD tax liabilities for the purpose of collecting the outstanding balance due. EDD obtains Federal Income Tax refund offsets through the Treasury Offset Program (TOP), which is administered by the Bureau of Fiscal Service (BFS) of the U.S. Department of Treasury. The TOP UIC effort will allow Tax Branch to submit UI benefit overpayments to the BFS to recover recipients’ UI compensation liabilities. The automated solution will leverage existing processes and systems, making required changes to add UI benefit overpayments to those liabilities submitted to TOP, resulting in an increase in revenue generation capabilities for the state, improving the effectiveness of the collection program, increase UI trust fund resources, and increase collections outside of California.

---

**Estimated Benefits and Services Improvements**

- Enhance the Benefit Overpayment Collection programs to extract subject employers, individuals and liabilities to populate the TOP database and generate offset letters to individuals or employers.
- Develop and implement a separate application and database to track and store TOP data and generate files to and receive files from BFS,
- Generate reports to track revenue, refunds, overpayments, and error suspense items.
- Periodic updates of liability to BFS.
- Continue annual extract and mailing.
- Archive, retrieval and purge functionality for TOP data.

---

**Automation Projects only:**

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
**Project Name**  
*State Information Data Exchange System (SIDES)*

**Project Start & Finish**  
SFY 13/14 – SFY 14/15

**Duration**  
2 years

**Project Priority**  
4

**Estimated Cost**  
$1,906,370

**Related Projects**  
None

---

### Strategic Plan Connection

**GOAL I:** Fiscal Stewardship  
**GOAL IV:** Enabling Innovation  
**GOAL V:** Responsible Service

---

### Project Description and Scope

The SIDES and SIDES E-Response were developed through a strategic partnership between the U.S. Department of Labor (USDOL) and state UI agencies. SIDES provides a nationally-standardized format in which employers and third-party administrators (TPAs) can receive and easily respond to UI information requests, attach documentation when needed and receive a date-stamped confirmation of receipt. Employers and TPAs that use SIDES are able to better anticipate and supply the data needed for UI information requests.

California’s EDD currently requests separation information from employers or their agents through a paper-based process using the U.S. Postal Service. Responding to paper-based UI information requests fully and within tight deadlines also creates a significant and costly administrative burden on companies today. The top root causes of UI overpayments in California include separation issues and benefit year earnings based on samples from the Benefit Accuracy Measurement program. Over a period of time, it is anticipated that California will be able to better detect separation issues and benefit year earnings sooner with the implementation of SIDES, thereby resulting in decreased improper payments.

### Estimated Benefits and Services Improvements

- Reduces follow-up phone calls.
- Helps prevent payments to those who don’t meet eligibility requirements.
- Eliminates unnecessary appeals.
- Streamlines the UI response processes, which reduces paper work while saving time and money.

### Automation Projects only:

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>35% savings in Postage and Printing over two years.</td>
</tr>
</tbody>
</table>
### Strategic & Tactical Project Details

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Project Start &amp; Finish</th>
<th>Estimated Cost</th>
<th>Related Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unemployment Insurance (UI)</td>
<td>SFY 13/14 – SFY 14/15</td>
<td>TBD</td>
<td>UIMOD CCNPAU</td>
</tr>
<tr>
<td>Call Center Enhancement</td>
<td>1 year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Priority</td>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Strategic Plan Connection

**GOAL V: Responsible Service**

#### Project Description and Scope

The Employment Development Department (EDD) Unemployment Insurance (UI) continually looks to improve UI service delivery especially with regards to Call Centers. The EDD UI is reviewing several call center features that would improve claimants’ access and experience into call centers. Specifically, technologies such as Virtual Hold and claimant message transcription are being reviewed to reduce claimants’ frustration and repeat call attempts. In addition, EDD UI has researched call center enhancements including:

- **Enterprise Workforce Management**
- **Skills Assessment**
- **Outbound Notification**

The EDD UI is determining which enhancements would allow EDD to better serve their claimants and greatly improve callers’ experience.

#### Estimated Benefits and Services Improvements

- **Virtual Hold technology** allows callers to automatically get a call back when it is their turn to talk with an EDD representative.
- **Enterprise Workforce Management** tool will allow the EDD UI to forecast and schedule agents across their enterprise based on actual metrics and trends. Also, this provides real-time adherence data and automated forecasting.
- **Skills Assessment** will allow the EDD UI the ability to identify and manage skills levels across their enterprise. In addition, EDD UI can develop customized training plans to monitor performance improvements.
- **Outbound Notification** will allow the EDD UI to perform outbound campaigns (i.e., new Reminder of UI telephone appointment, legislation changes, etc.). Also, enables EDD UI to provide customer centric outreach and increase communication with their customers.

#### Automation Projects only:

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
### Proposed Project Name

**Disability Insurance Call Center Upgrade**

### Project Start & Finish

- **SFY 13/14 – 14/15**
- **Duration**
  - 1 year
- **Project Priority**
  - 6

### Estimated Cost

- **$690,000**

### Related Projects

- Tax Call Center Upgrade

---

#### Strategic Plan Connection

**GOAL II:** Skilled Workforce  
**GOAL III:** Sustainable Operations  
**GOAL IV:** Enabling Innovation  
**GOAL V:** Responsible Service

---

#### Project Description and Scope

This project will upgrade the Disability Insurance Branch (DIB) Call Center Platform to:

- Replace the DIB’s end-of-life and unsupportable call center system equipment with the enterprise solution to reduce the risk of system failure and ensure redundancy.
- Upgrade five DIB call centers to one virtual call center that allows for a statewide skills-based and real-time call routing.
- Implement an automated system that provides timely and accurate consolidated management reports to help administer the call center operation.
- Apply electronic security features for identity management and authentication of incoming callers for increased fraud protection.
- Implement an automated system that enables a 24/7 contingency design in the event of disaster or emergency.

---

#### Estimated Benefits and Services Improvements

- Improve service access to customers.
- Use telephone technology to assist in the detection of fraud against the DIB programs.
- Provide timely and accurate 24/7 access to services for customers.
- Attain a system that is scalable, allows for increased staff capacity and system enhancements to meet customer service demands in the future.

---

**Automation Projects only:**

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
Proposed Project Name: Tax Call Center Upgrade

Project Start & Finish:
SFY 13/14 – 14/15
Duration: 1 year
Project Priority: 7

Estimated Cost:
$690,000

Related Projects:
Disability Insurance Call Center Upgrade

Strategic Plan Connection
GOAL II: Skilled Workforce
GOAL III: Sustainable Operations
GOAL IV: Enabling Innovation
GOAL V: Responsible Service

Project Description and Scope
This project will upgrade the Tax Branch Employment Tax Call Centers Platform and all related Tax customer service areas. The current call center technology is outdated and is no longer effective. The Tax Branch would like to leverage new technologies with additional functionality and features that would enable Employment Tax Call Centers to increase customer service levels and potentially increase revenue.

Estimated Benefits and Services Improvements
- Improve service access to customers.
- Use telephone technology to assist in the detection of fraud against the EDD programs.
- Provide timely and accurate 24/7 access to services for customers.
- Attain a system that is scalable, allows for increased staff capacity and system enhancements to meet customer service demands in the future.

Automation Projects only:

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
Proposed Project Name

*Benefit Overpayment Collection Automation (BOCA)*

<table>
<thead>
<tr>
<th>Project Start &amp; Finish</th>
<th>Estimated Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFY 16/17 – SFY 19/20</td>
<td>$9,333,000</td>
</tr>
</tbody>
</table>

Duration

4 years

Project Priority

8

Related Projects

*Treasury Offset Program - Unemployment Insurance Compensation (TOP UIC)*

Strategic Plan Connection

**GOAL I:** Fiscal Stewardship  
**GOAL III:** Sustainable Operations  
**GOAL IV:** Enabling Innovation

Project Description and Scope

This project will convert the existing Tax Branch Benefit Overpayments Collection System (BOCS) from an outdated programming language that is no longer supported by the vendor to currently supported technology.

The Tax Branch within the EDD collects Unemployment Insurance (UI) and Disability Insurance (DI) overpayments. A benefit overpayment occurs when a claimant applies for and receives full or partial benefits for week(s) in which they are not eligible. The UI and DI programs support the collection of benefit overpayments made to recipients in each respective program.

The UI program provides temporary, partial wage replacement to individuals who have lost their jobs through no fault of their own.

The DI program provides temporary, partial wage replacement to eligible disabled workers of California who suffer a loss of wages when they are unable to work due to illness or injury.

**Estimated Benefits and Services Improvements**

- The increased revenue will benefit the UI, DI and General Fund balances and the increased collection of UI and DI fraud overpayments will be reimbursed to the employers’ accounts.
- Moves the BOCS to a supported technology platform that can sustain operation.
- Modernization of the BOCS application will improve data handling capabilities and will provide a more structured and documented program.

Automation Projects only:

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
</tr>
</tbody>
</table>

TBD: To Be Determined
### Project Details

**Project Name**
Electronic Requester Information Abstract Services

**Project Start & Finish**
SFY 16/17 – SFY 17/18

**Duration**
1 year

**Project Priority**
9

**Estimated Cost**
$750,000

**Related Projects**
N/A

### Strategic Plan Connection

**GOAL I:** Fiscal Stewardship
**GOAL III:** Sustainable Operations
**GOAL IV:** Enabling Innovation
**GOAL V:** Responsible Service

### Project Description and Scope

The EDD currently provides both paper and electronic confidential information abstracts to external, legally authorized governmental agencies and requesters. This project would replace an aged, and difficult to maintain, 1970’s Mainframe batch processing system with access to confidential information via secure file transfer processes and authorized on-line services. Full accountability for external requester account agreements, electronic access, requester authentication, authorization, and a detail audit trail of activity would be established.

### Estimated Benefits and Services Improvements

- The ability to leverage new automation technologies to replace outdated systems.
- The electronic process will be able to handle requests more timely and accurately.
- Electronic processing eliminates manual processing time in order to handle entry and outputs, to package and ship abstract products.
- Allows customers to access their data on an as-needed basis.

### Automation Projects only:

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
</tr>
</tbody>
</table>
## Proposed Project Name

*Paid Family Leave (PFL)*  
System integration into State Disability Insurance (SDI) Online Services

## Project Start & Finish

SFY 16/17 – SFY 18/19  

**Duration**  
3 Years

## Estimated Cost

$15,002,000

## Related Projects

none

## Project Description and Scope

This project will be designed to incorporate the PFL into the newly redesigned SDI Online system. By leveraging the SDI Online platform, the SDI Online and PFL would be one application, one training environment, and one test environment. The PFL reports would be modified to include data that is captured on the SCDB.

## Estimated Benefits and Services Improvements

- The DIB would improve their capability to provide timely, comprehensive, reliable and accurate data to the Legislature and to other states and organizations who seek data regarding the PFL program.
- Provides comprehensive and reliable data upon request demonstrates that California recognizes its responsibility as the first and only state to offer a PFL program and provide assistance to other states who may be considering a similar program.
- Time currently spent researching and obtaining aggregate data will be reduced or eliminated.
- Provides DIB staff with the proper tools to correct and improve business processes with minimal dependence on Information Technology Branch resources.
- Fewer PFL production problems will be referred to IT staff.

## Automation Projects only:

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
## Project Name

*Unemployment Insurance (UI) Forms*

## Project Start & Finish

SFY 16/17 – SFY 18/19  
**Duration**  
3 years  
**Project Priority**  
11

## Estimated Cost

$5,008,000

## Related Projects

None

### Strategic Plan Connection

**GOAL I:** Fiscal Stewardship  
**GOAL III:** Sustainable Operations  
**GOAL V:** Responsible Service

### Project Description and Scope

This project will allow for critical Unemployment Insurance (UI) program forms to be scanned at the Document and Information Management Center (DIMC) and processed using the InfoImage system. InfoImage captures, manages, stores and allows electronic access to paper forms for UI claims. The UI forms are related to determinations of UI benefit eligibility, identity verification, employer responses, appeals, overpayments, benefit audits, and rulings.

It will allow electronic images of the specified forms to be processed electronically by UI staff in any office allowing for greater flexibility in the distribution of the work.

### Estimated Benefits and Services Improvements

- Provide access to the Unemployment Insurance (UI) forms from any location within the state.
- Stored images of forms reduces the current risk of lost and misplaced paper files containing these critical forms which then cannot be located and retrieved for required activities, including determinations of benefit eligibility and employer and claimant appeals.
- With the UI forms available by image throughout California, EDD will improve services to their customers.

### Automation Projects only:

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
</tr>
</tbody>
</table>

15
**Project Name**  
*E-Apply Modernization*

**Project Start & Finish**  
SFY 16/17 – SFY 20/21

**Duration**  
5 years

**Project Priority**  
12

**Estimated Cost**  
$10,940,000

**Related Projects**  
None

**Strategic Plan Connection**

- **GOAL I:** Fiscal Stewardship  
- **GOAL III:** Sustainable Operations  
- **GOAL IV:** Enabling Innovation  
- **GOAL V:** Responsible Service

**Project Description and Scope**

This project will provide improvements to the existing Unemployment Insurance (UI) claim filing application, known as the eApply4UI that is used to file and reopen most types of UI claims. The proposed enhancements to this existing Internet application will enable claims to be auto-filed when staff intervention is not required and to classify exceptions requiring staff intervention. The improvements will also allow additional UI claim types (i.e., former military members, federal government employees, etc.) to be entered and processed through this channel. Improvements will enable UI staff to be redirected to other priority workload items who currently review and process each claim request through the eApply4UI applications.

Improvements will enable claims to be auto-filed when staff intervention is not required and to classify exceptions requiring staff intervention. The improvements will also allow other UI claim types as cited in the aforementioned to be entered and processed through this channel. Improvements will enable UI staff who currently must review and process each claim request through eApply4UI to be redirected to other high priority workload items such as information and Internet inquiries and determinations.

**Estimated Benefits and Services Improvements**

- Improved services to EDD and its customers by expanding use of the application to all individuals who elect to file using this on-line application.
- The E-Apply Modernization project will create efficiencies by enabling the UI Program to redirect staff to other high priority workload items.

**Automation Projects only:**

<table>
<thead>
<tr>
<th>PY/Cost Savings Utilization</th>
<th>PY Reductions</th>
<th>OE&amp;E Reductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redirection to mission critical program areas</td>
<td>TBD</td>
<td>None</td>
</tr>
</tbody>
</table>