

EDDNext Customer Centered Roadmap

FY22-23 – FY26-27



EDDNext Vision & Objectives

Vision:

EDDNext will empower program administration with a user-centric and secure technology environment to support timely and quality service to California's workers.

Project Objectives:



Customer-Centered Service Design – Ensure equity access via optimizing service channels (i.e. mobile social media, self-service website, chatbot, live chat) with multiple language access.



Increase Self-Service Opportunities – Simplify self-service functionality across all programs for claims intake and process.



Mitigate Fraud – Protect claimant identity, reduce fraudulent activities, and reduce the costly risk to the State by re-engineering claims processing and enhancing technology driven security.



Improved, Consistent, Integrated Program Delivery – Extend data analytics, improved dashboards, daily reporting on claim progress, fraud analysis, standardized user experience, and enhance EDD training to better serve claimants



Greater Adaptability for Faster Program Changes – Integrated system that enables rapid program changes and scalable to meet the unusual spikes in workload demand and modifications required for compliance with USDOL and California rules and regulations.

EDDNext Workstream Definitions

Project Workstream

Workstream Definitions

Shared Customer Portal

Provides a single portal for EDD online customers (e.g. claimants, employers, medical providers) including multi-language, ID-proofing, and self-service resulting in a more accessible streamlined customer experience.

Fraud Detection

Enhancement of current fraud solution that will allow for more robust monitoring of systems resulting in greater detection and prevention capabilities and the ability to flag suspicious activity.

Document Management System

Replacement of the current scanning/data capture, document storage, and remittance functionality resulting in the reduction of manual processes.

Integrated Contact Center & Integrated Voice Response System

A multi-language interactive IVR system offering end-to-end customer experience tracking and analytics for inbound engagement. By providing this integrated solution, we aim to decrease call center wait times and enhance the overall experience for customers interacting with EDD.

Knowledge Management

Improved training through staff access to self-service content supporting a more efficient rollout of new technologies and policies

Forms Redesign

Assessment, proposed changes, and mockups, of online and paper UI, DI, and PFL forms and notifications including design best practices, prioritization, language access and accessibility standards.

Reporting and Analytics

Enhancement of current analytics, and reporting functionality to allow for more granular monitoring and greater search capabilities allowing for more powerful analytics of EDD data.

Data Management

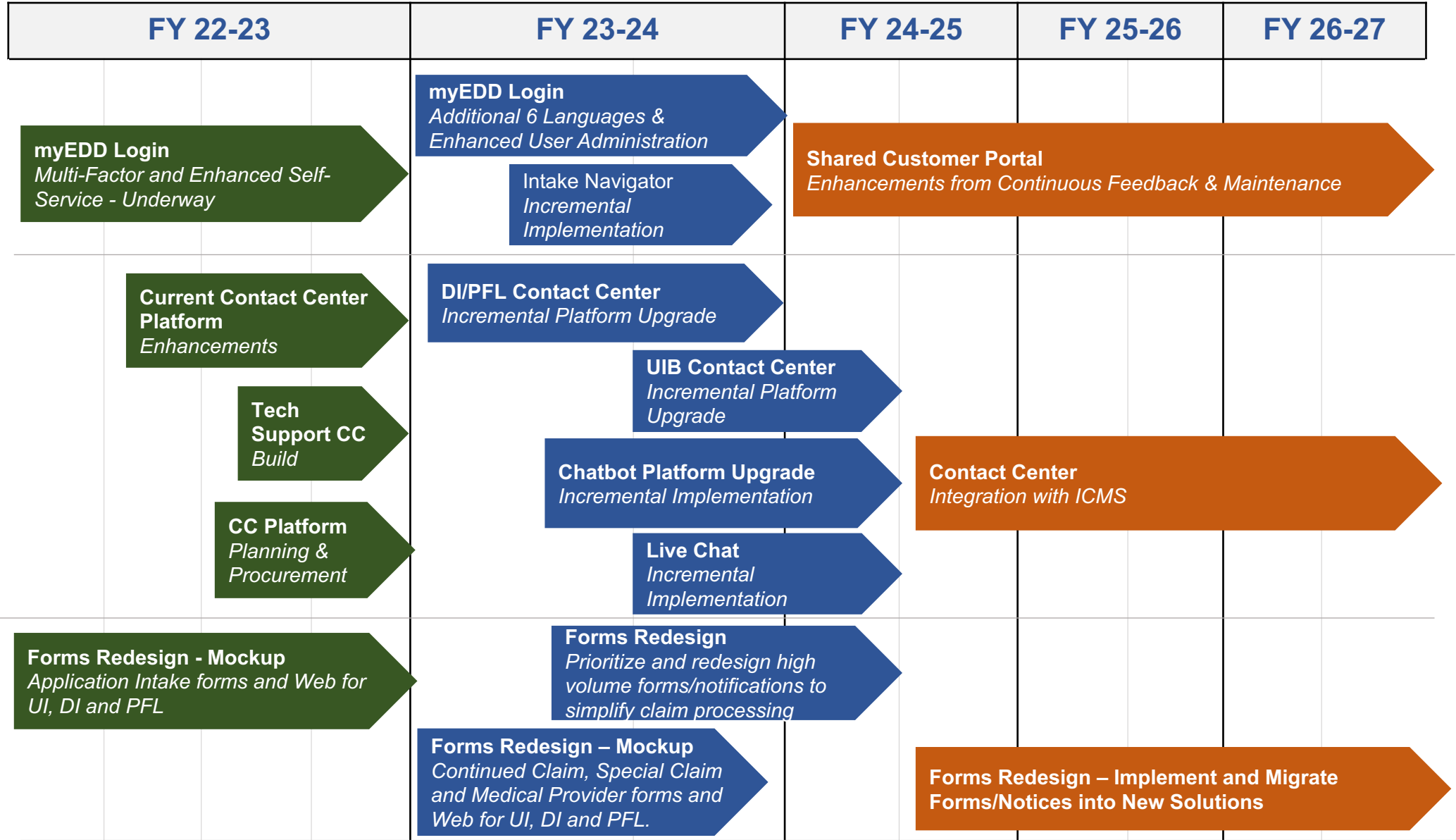
Enable data standardization making it easily accessible to both internal and external users, including access to their claim status, better decision making and improve productivity.

Integrated Claims Management System

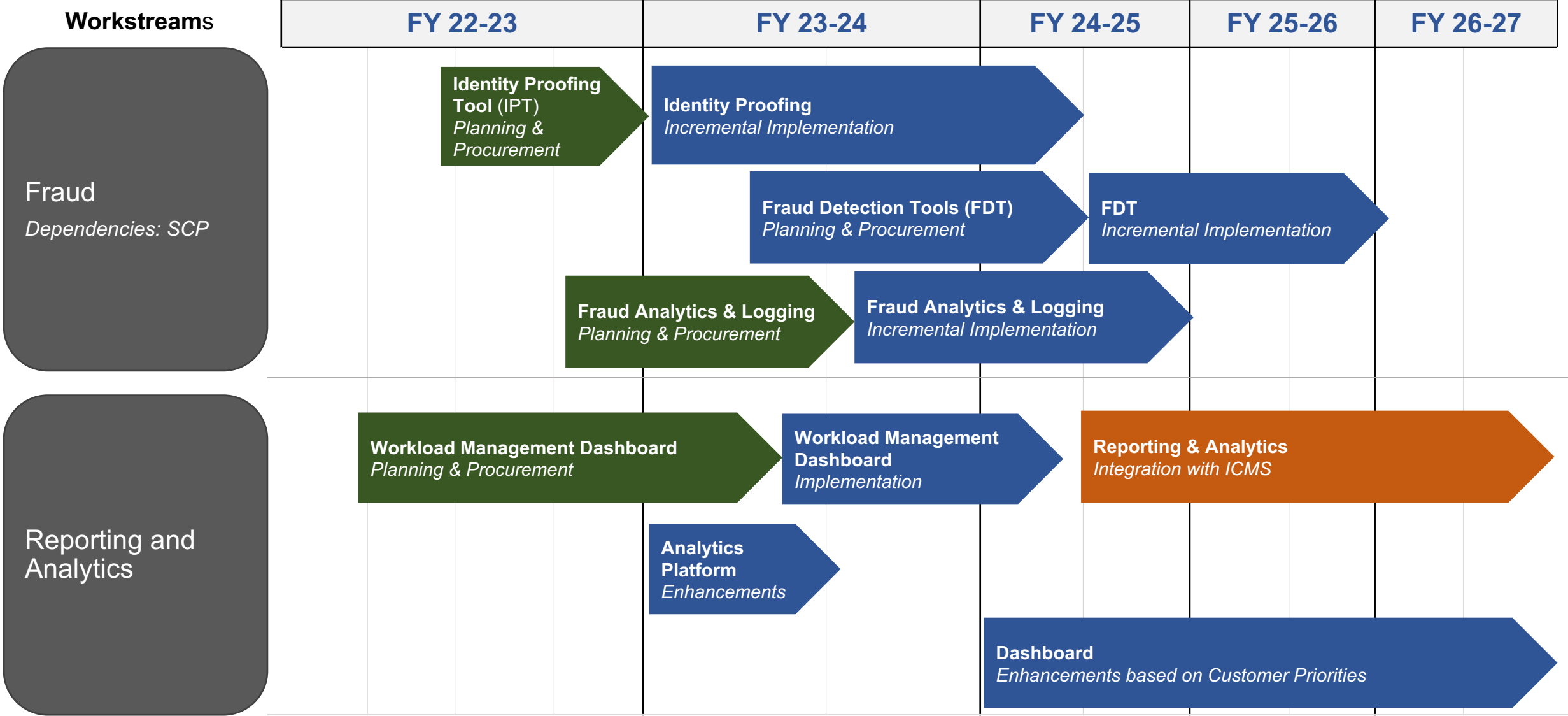
Benefits processing system that will occur in multiple phases to avoid interrupting the customer experience and allow EDD to continue serving customers while the modernization effort occurs concurrently. The new claim processing system will integrate with and leverage the Shared Customer Portal, Integrated Contact Center and the data management platform to ensure real time and integrated information is available for both claimants and EDD staff.

EDDNext High Level Roadmap – Customer Experience (CX) Workstreams

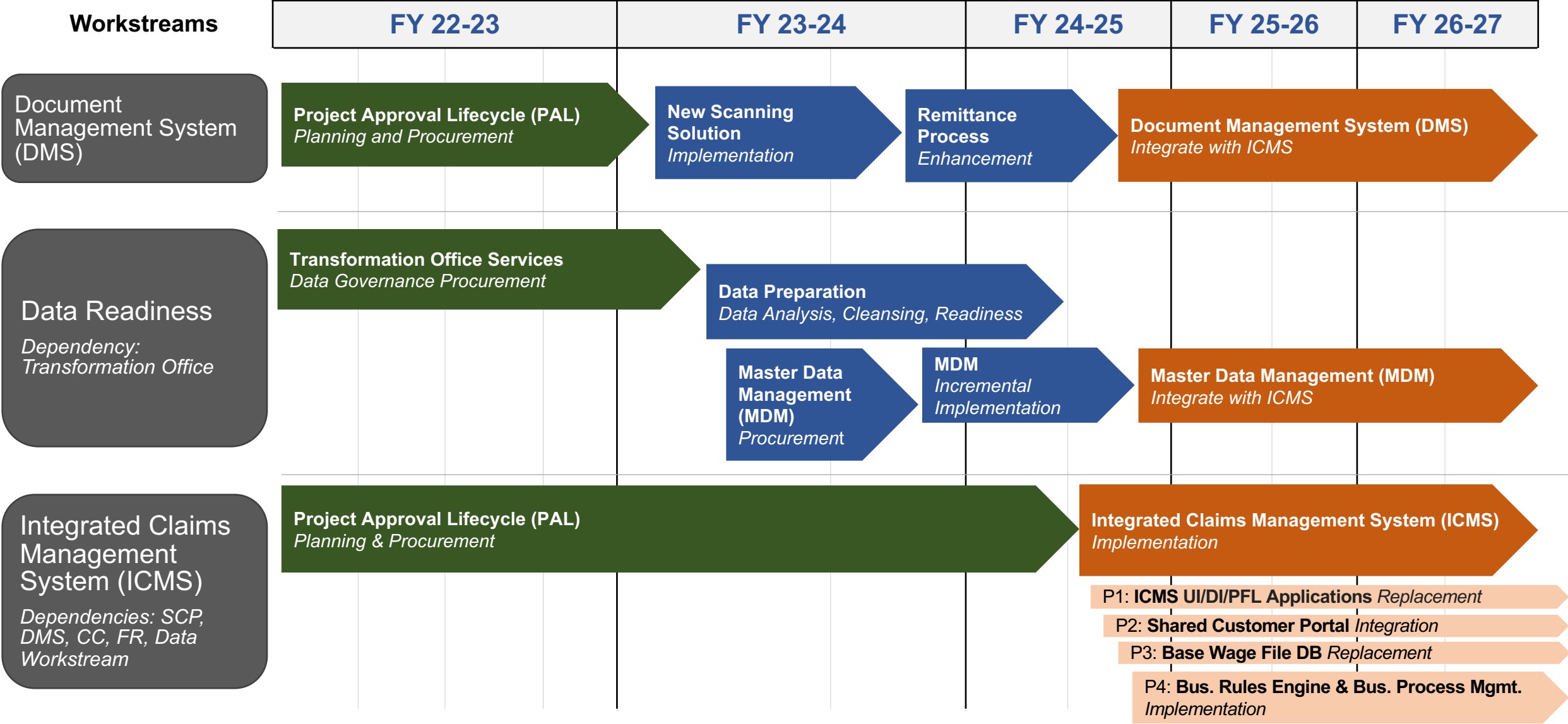
Workstreams







EDDNext High Level Roadmap - Fraud & Reporting Workstreams



EDDNext High Level Roadmap – Backend Workstreams



EDDNext Workstreams High Level Activities – Customer Experience (CX) & Reporting

Activity Areas	FY 22/23	FY 23/24	FY 24/25	FY 25/26	FY 26/27
 <p>Customer</p>	<ul style="list-style-type: none"> • Redesign myEDD portal to be more user friendly. • Implementation of myEDD portal for UI, DI, and PFL customers with Multi-Factor Authentication (MFA). • Redesign application intake application form and web with customers and advocacy group input for future implementation. 	<ul style="list-style-type: none"> • myEDD portal support of six additional languages. • Modernize user administration platform for future integrations. • Implement Intake Navigator to guide claimants to appropriate EDD services that will improve claims processing efficiency. • Redesign Continued Claim, Special Claim and Medical Provider forms and Web for UI, DI and PFL with constituents and advocacy group input for future implementation. • Prioritize and redesign high-volume forms/notifications to simplify claim processing. 	<ul style="list-style-type: none"> • Implement and Migrate Forms/Notices into New Solutions 	<ul style="list-style-type: none"> • myEDD portal integration with ICMS. 	
 <p>Call Center Modernization</p>	<ul style="list-style-type: none"> • Automated Call Routing - Implemented additional call TAGS to properly categorize the claimant calls. • Additional Service Channel – Deliver SMS capabilities to DI/PFL customers. • Technical Support - Implement a Technical Support Contact Center. 	<ul style="list-style-type: none"> • Interactive Voice Recognition (IVR) - Modernize the call center platform and extend IVR capabilities to increase first contact resolution. 	<ul style="list-style-type: none"> • Contact Center Implementation completed. • Chatbot and Live Chat implementation completed. 	<ul style="list-style-type: none"> • Integration - Contact Center with ICMS. 	<p>Maintenance & Operations</p>
 <p>Fraud Prevention</p>	<ul style="list-style-type: none"> • Improve Claimant Identity Security - Develop system logging and event management strategy in a FEDRAMP compliant IAM environment 	<ul style="list-style-type: none"> • Simplify ID Proofing - Implement real-time Identity Proofing tool to simplify the ID Proofing process. • Implement myEDD portal logging capabilities to improve cyber security/fraud actions against EDD benefits system. 	<ul style="list-style-type: none"> • Enhance fraud detection tools for efficiency and minimize the risk of fraud. 	<ul style="list-style-type: none"> • Enhancements - Continue enhancing fraud detection tools. 	
 <p>Reporting</p>	<ul style="list-style-type: none"> • Start workload dashboard procurement. 	<ul style="list-style-type: none"> • Enhance analytics and reporting platform to add new functionalities. 	<ul style="list-style-type: none"> • Workload Dashboard needed to effectively operate a Contact Center implementation completed. 	<ul style="list-style-type: none"> • Support the ICMS implementation. 	

EDDNext Workstream High Level Activities – Document Management



FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27
<ul style="list-style-type: none"> Process Approval Lifecycle (PAL) Process Completion 	<ul style="list-style-type: none"> Replace scan/data capture and document storage technologies to improve submission and intake of paper forms, letters, and correspondence 	<ul style="list-style-type: none"> Replace remittance processing solution 	<ul style="list-style-type: none"> Migrate existing data storage documents into the new document storage solution. 	<ul style="list-style-type: none"> Integrate Claim records with mail/OCR/noticing solution to attach inbound forms and correspondence to claimant accounts and their associated claims processing workflow queues.

EDDNext Workstream High Level Activities - Data Management



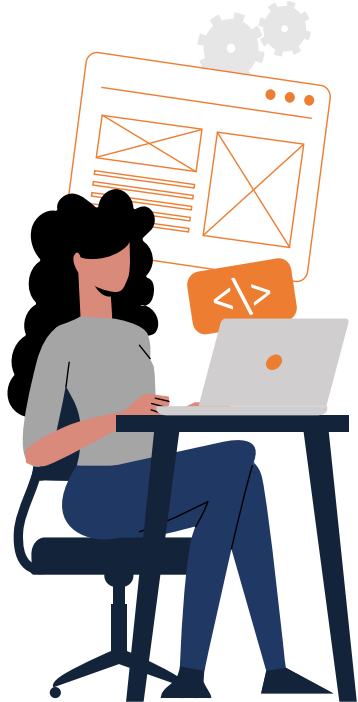
FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27
<ul style="list-style-type: none"> • Plan for EDD Data Management to improve business processes and decision-making, leading to better customer experiences. 	<ul style="list-style-type: none"> • Develop Data Management Strategy and Roadmap to ensure efficient and effective use of the data assets. • Assess existing data capabilities to identify areas for improvement to better manage and leverage EDD data, • Map and understanding data flow to identify potential bottlenecks or efficiency improvements in customer interactions. • Identify data sources and users to ensure that customer data is protected leading to greater trust and satisfaction among customers. • Implement a Master Data Management (MDM) solution to ensure data used by EDD is accurate, consistent and reliable. 	<ul style="list-style-type: none"> • Set Target Data Management Capabilities to define business processes and customer experiences metrics. 	<ul style="list-style-type: none"> • Continue collecting and improving customer information to help EDD make better data driven decisions. • Continue analyzing the data from across the programs, to get a better understanding of our customers needs, and use that knowledge to continue to improve our business and provide the best service possible. 	<ul style="list-style-type: none"> • Continue collecting and improving customer information to help EDD make better data driven decisions. • Continue analyzing the data from across the programs, to get a better understanding of our customers needs, and use that knowledge to continue to improve our business and provide the best service possible.

EDDNext Workstream High Level Activities - ICMS



FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27
<ul style="list-style-type: none"> • PAL Stage 1 Business Analysis - Identified business sponsorship, stakeholder assessment, business program & project justification, business outcomes desired, initial project and funding readiness • PAL Stage 2 Alternative Analysis - Requirements gathering and solicitation input: Market Research Prep, Roadmap (Estimates, Schedule), Viable Alternative Solutions, Cost Estimates 	<ul style="list-style-type: none"> • PAL Stage 3 Procurement Management - Project and Procurement Roadmap, Build and Conduct Solicitation, Ancillary Procurements • PAL Stage 4 Project Readiness - Contract Organization, and Project Readiness, Schedule and Cost Baselines, Business Objective Valuation, Solicitation Results, Initial Risk Register • Refine requirements and prepare/release RFP solicitation. 	<ul style="list-style-type: none"> • Award System Integrator Contract - Start the implementation of ICMS integrated services platform and data hub technology. Integrate capabilities of the enterprise service bus and API service management connecting all other systems in a modern architecture. Enterprise content management will provide key functionality required to be in place for modern ICMS capabilities. Enhanced data services will facilitate additional progress in analytics and reporting capabilities. • Integrated Claims Management (Phase 1 – Intake & Eligibility): Replacement of the core claims system in two major phases. The first phase - integrate the Shared Customer Portal to input claimant data, manage claim eligibility rules and apply them to active claims, automate business workflow and claim management logic, and manage staff activity. 	<ul style="list-style-type: none"> • Incorporate staff portal and a configurable English language rules engine. Leverage the integration platform and ID Proofing solution to establish integrations with internal and external data sources to validate identify in real-time. • Develop a replacement for UI State Information Data Exchange System (SIDES) and the base wage database to integrate with new claims processing system and its business logic associated with the full claim lifecycle. 	<ul style="list-style-type: none"> • Integrated Claims Management (Phase 2 – Payments & Overpayments): Transform the financial processing of paying claims and integrating with financial systems. Calculate payments based on eligibility and communicating these payment remittances to core financial systems. Modernize payment and improve overpayments collection options, including the implementation of more modern technologies to support claimants making payments and EDD collection of overpayments. EDD may opt to maintain leveraging the collection capabilities in ACES for overpayment collections as one of those options.

EDDNext Customer Outcomes & Benefits



FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27
<ul style="list-style-type: none"> • Deploy Shared Customer Portal to enhance online experience and security through a single sign-on, multi-factor authentication, and mobile responsiveness. • Expand language access to support non-English speaking applicants. English and Spanish by June 2023. • Forms Redesign recommendations for more accessible applicant filing for paper and online claims. • Improve customer service consistency with centralized Knowledge Base for call center agents. 	<ul style="list-style-type: none"> • Expand language access to support non-English speaking applicants. Simplified Chinese, Traditional Chinese, Vietnamese, Tagalog, Korean and Armenian. • Forms Redesign recommendations for more accessible continued claim, special claims and medical provider filing for paper and online claims. • Improved service with enhanced document upload capability. • Pilot new contact center to improve customer service to call in claimants. • Improved service through unified caller view of a customer's profile with the most up to date information. • Decrease manual claims processing with improved scanning system. • Minimize claimant proof of ID burden by expand online fraud capabilities. • Improve business efficiency with expanded reporting visualization tools. 	<ul style="list-style-type: none"> • Expand Self-Service Access for applicant notification and self-service capabilities by implementing claimant Menu Displaying Integrated Claims (UI/DI/PFL) status, payments, notifications, etc. • Improve processing times by providing expanded capability of Medical Providers and Employers to provide claims information online. • Access to online ChatBot (enhanced Intelligent assistant) that services both web and dial in claimants. • Online Live-Chat Access • Begin integration and modernization of Claims eligibility System and Work queues to modern platform. • Begin transformation of backend system to new Systems of Records. • Expand self-service options for dial-in customers with access to modern integrated contact center. 	<ul style="list-style-type: none"> • Integrate customer feedback to continue streamlining claims processing and benefits payment, communications standardized across programs. • Continue integration of Claims eligibility System and Work queues. • Continue integration of backend system to new Systems of Records. 	<ul style="list-style-type: none"> • Integrate customer feedback to continue streamlining claims processing and benefits payment, communications standardized across programs. • Integrate customer feedback to continue enhancements to phone support for customer experience. • Retire UI and DI Legacy Systems.