5.0 PROPOSED SOLUTION

5.1 Solution Overview

AWI's "extreme makeover" requires the seamless integration of the claimants' UC experience with the ability to find meaningful re-employment through a one-step, "work first" system. Accenture's AWI-specific experience means faster project start-up, lower delivery risk and proven large-state implementation success.

Fast Facts

- 6 of the 10 largest states operate Accenture-built UC systems
- 16 UC benefit and tax implementation projects during the last two decades
- 500 Unemployment industry-specific professionals trained on the latest technical and program areas
- Millions of unemployed around the world use our systems for their re-employment activities

FLAWI 149

AWI's requirements and the UC program goals are the foundation for the modernized UC system that Florida needs. The vision of a one step, "work first" system that seamlessly takes the claimant from initial filing all the way through to meaningful re-employment requires a contractor that knows Florida's UC business as well as one with proven Workforce Florida experience delivered at scale, across the entire state. **Accenture's AWI-specific experience and our proposed transfer solution, *myBIS*, provides the State with the confident choice for lower delivery risk, up-to-date, large-state functionality and successful completion of the mandated schedule.**

***myBIS* brings AWI the best thinking and leading practices from our current, large-state UC design, development and implementation project.** *myBIS* uses adaptable and up-to-date technology, is web-based and provides maintenance and updating ease. *myBIS* addresses the Agency's full automation requirements, freeing UC staff to concentrate on the most important activities while still providing options for required user intervention to deal with exception claims.

myBIS workflow queues allow for more efficient processing through automation of work and electronic documents capture. Automated scheduling contributes to streamlined operations and allows supervisors to modify workloads as needed. Centrally-stored documents provide UC staff with ready access to any claim information and documentation.

Figure 5-1 illustrates how the transfer of enhanced core UC functionality from our Illinois Benefits Information System (IBIS) project combined with our AWI-specific UC experience sets the solid foundation for AWI's "extreme makeover" of the UC system.

The functionally-rich enhanced application supports the Agency's UC Claims and Benefits processes. UC staff, UC management and AWI's customers will have easy access through multiple interaction channels. Customers will be able file claims through a self service portal that expedites the process and connects seamlessly with the Workforce Florida's Employ Florida Marketplace (EFM) for re-employment activities.

An Electronic Case Folder provides UC staff with electronic images of and makes information retrieval faster. *myBIS* infrastructure is easy to maintain and flexible to address evolving AWI, State, and Federal requirements. The *myBIS* rules engine can process complex information, handle large volumes, and provides flexibility for rule changes. By implementing *myBIS*, AWI acquires a system that can quickly incorporate changes, modifications and enhancements in the changing UC landscape.

Best Value

myBIS has intuitive screens and will have familiar descriptions of data fields. This reduces the burden on current UC staff and paves the way for future staff's success. We will capture and codify the subject matter expertise and knowledge your experienced workforce has and use it for the screen layouts. This means faster use, better understanding and fewer errors.

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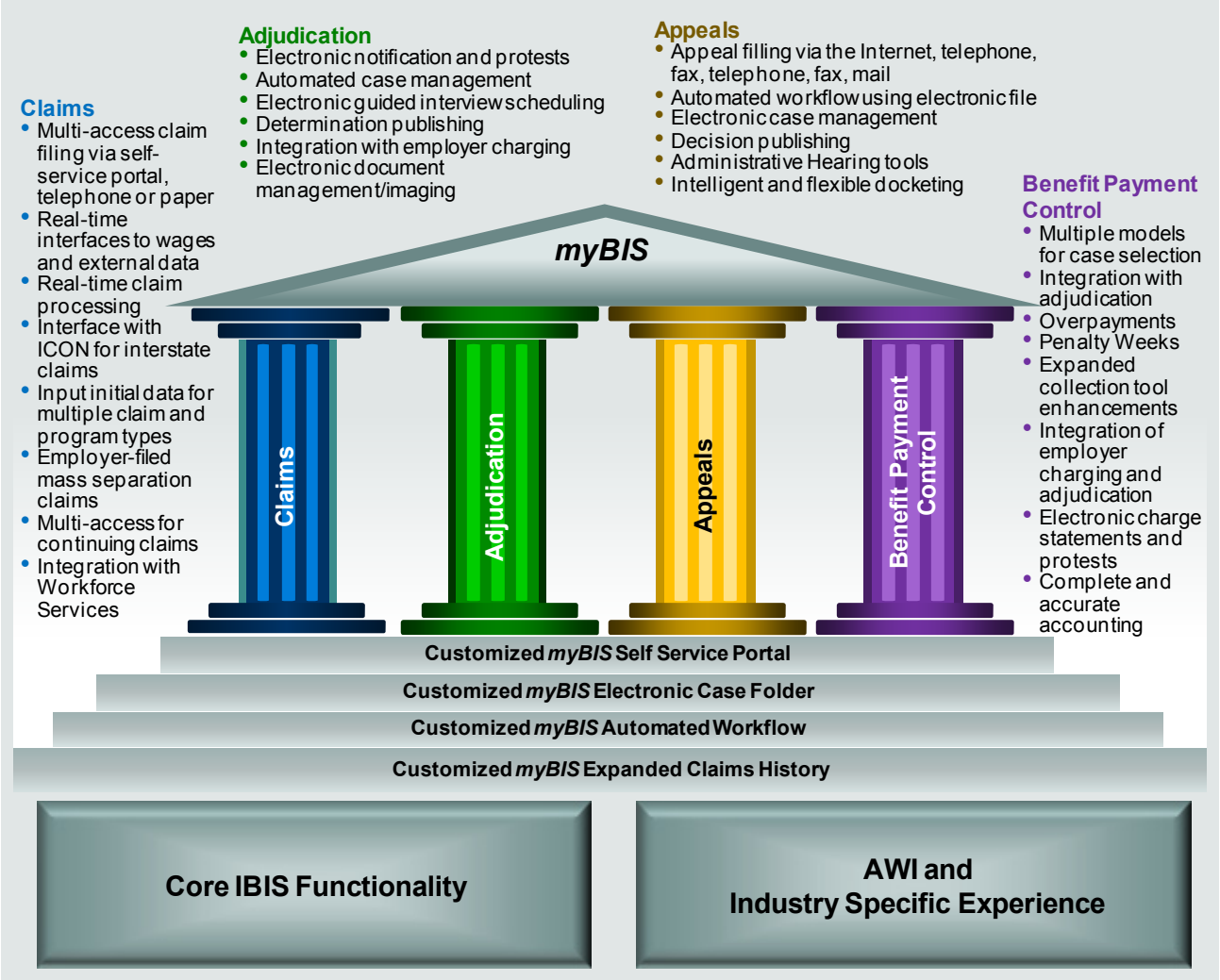

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Figure 5-1. Accenture's myBIS solution is founded on the most current large-state UC solution in the country designed and enhanced as an integrated platform providing more reliable customer service

myBIS presents a significant time and cost savings opportunity through less re-work as well as positioning the Agency for lower training cost and faster staff readiness in the future, as your current workforce changes over the next several years. *myBIS* core functionality is current and contains all the latest mandated changes. Our solution saves time and effort right from the start.

The *myBIS* solution is enhanced to provide AWI with the most current design, development and implementation of these complex systems from a large state and offers the low risk choice for modernizing the Florida UC system through an "extreme makeover".

5.1.1 Detailed Overview

The following section provides AWI with details about *myBIS* functions and features beginning with the claims intake activities and continuing through adjudication, appeals and benefit payment control.

For each of these enhanced core functions, *myBIS* provides a simplified user interface, better integration between functions, faster data retrieval and access and less cumbersome workflow. This removes the need to be a UC policy expert to make it through the work activities.

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Using already tested and proven templates, assets, scripts, and designs that work at scale reduces AWI's risk. **Florida's UC modernization effort is not the place for a small-state solution designed to handle fewer customers than AWI serves in Dade County alone.**

myBIS addresses AWI's requirements and provides web-based access for customers and staff; uses a relational database, work item queues, imaging and automated scheduling; streamlines tasks through modified business processes and rule based work routing; and eliminates the numerous manual processes and workarounds killing staff productivity today.

myBIS helps AWI achieve the "extreme make-over" and UC modernization vision using proven and adaptable large-state core functionality

- *myBIS* core functionality works through multiple channels
- *myBIS* adapts to and supports re-engineered AWI processes, reducing manual tasks and workarounds
- *myBIS* enables trust fund savings by preventing and reducing overpayments and
- *myBIS* supports work first activities to reduce the length of unemployment

FLAWI 085

myBIS provides an Integrated Desktop (ID) that seamlessly connects functionality across the different program areas. This frees UC staff to perform business activities regardless of location. The benefit for supervisors and program managers is redistribution of workload when necessary.

myBIS positions AWI to jump-start the Florida UC modernization effort using proven core functionality that is adaptable to Florida's program. This customizable transfer from a large state mitigates the "blank slate" risks and overcomes the "work at scale" challenges that small-state solutions offer.

In selecting Accenture, AWI leverages the time and effort spent enhancing the solution and incorporating industry best practices, current mandated changes and lessons learned.

Claims

Accenture's previous AWI and Workforce Florida experience makes joint design and development efforts more collaborative and more economical while addressing specific Claims business and process needs. Strong working relationships based on previous projects means faster design cycles and quick response to changing needs and user expectations. Figure 5-2 outlines the Claims functionality that *myBIS* will provide.

Initial Claims

In the changing UC business, customers are increasingly expecting both easier and additional channels to file claims. *myBIS* provides that claim filing flexibility. Claims can come through the Self Service Portal, telephone/IVR, or by contacting UC staff. All claims, regardless how they arrive, are processed and filed in the same system. This reduces redundant data entry and increases data accuracy. Importantly, the automatic interface with other organizations, such as Workforce Florida, eliminates the need to send or retrieve data and claimant's re-employment activities.

Business rules determine whether an initial claim requires staff review. If not, any necessary correspondence, posting, adjudication issues or other activities take place as appropriate. If business rules determine a claim requires staff review before filing, *myBIS* sends the claim to an in process claim queue and UC staff receive notification of the claim via a work item. The work item will route to a specific user or location based on customizable business rules.

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myBIS makes staff more productive. For example, transfer functionality will make claim entry for mass layoffs less burdensome. Staff will enter employer and separation information a single time and apply the mass layoff details to a large number of claims. This reduces the time required to handle these special situations and reduces the time needed for claimants to receive appropriate benefits.

The *myBIS* claim intake process will provide several automated interfaces with partner agencies. For example, upon initial claim filing, *myBIS* will interface with Employ Florida Marketplace (EFM) to register claimants. Automated claimant registration supports the Agency's focus on getting Floridians back to work. *myBIS* automatically identifies claimants for re-employment services before they begin receiving benefits.

Interfaces with the Immigration and Naturalization Service (INS) and the Florida Department of Corrections help to identify claimants who potentially should not be receiving benefits. This upfront screening is a step in the right direction for preventing potential overpayments. If the claimant is incarcerated or not unauthorized to work in the U.S., *myBIS* would automatically create an issue and associated work item.

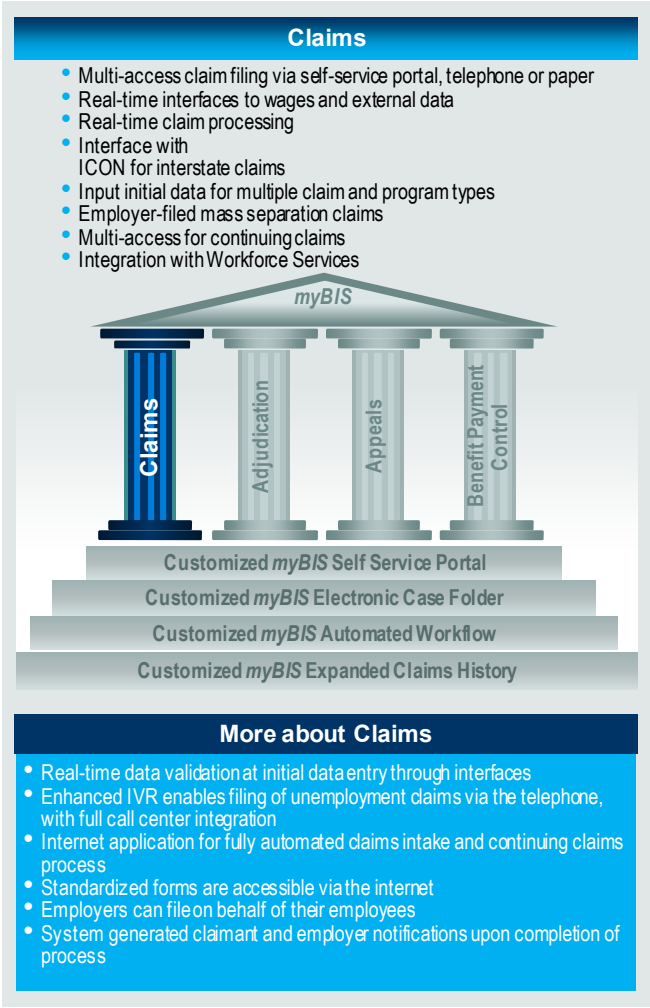

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Figure 5-2. myBIS Claims

myBIS will also interface with the employer tax system to pull employer account information including account numbers, account status and addresses for Florida employers. This will reduce errors and correctly identify employers on a claim. Identifying the correct employer accounts is necessary for employer correspondence and charging for benefits paid.

In order to set a claimant's occupations code, *myBIS* will interface with the US Department of Labor O*NET system. Based on the returned data, *myBIS* will set the occupational code so that claimants are properly categorized based on occupation.

For each military employer, *myBIS* interfaces with the Federal Centralized Claims Center (FCCC) and automatically sends a request to validate use of wages and to validate the provided separation information. In addition to automatic processing, UC staff will be able to create a request for military wages and separation information to be sent through the FCCC interface in order to confirm or supply military information for a claim. When *myBIS* receives a FCCC response to military wages and separation information, the military wages would then be automatically added to the claim and a monetary redetermination processed if the wages can be used on the claim based on defined business rules.

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For federal employers, *myBIS* automatically determines the state of assignment based on data collected during the claim intake process. If wages were assignable to Florida, *myBIS* would then automatically send a request through the FCCC interface to confirm that wages are available and have not been used elsewhere. If wages are assignable elsewhere, *myBIS* will send a FCCC confirmation on use of wages once the wages are received from the state where assignable. Similar to military wage data, federal wage information received from FCCC would be automatically associated to the claim when business rules determine that the wages can be used.

The ICON interface to automate Combined Wage Claim (CWC) processing is twofold. For claims filed in Florida, IB-4 Requests are generated as part of the claim filing process and automatically sent by *myBIS* through ICON that evening. *myBIS* interfaces are further described in Figure 5-3 including data sent from *myBIS* and data received from the partner agencies. When IB-4 Responses are received, *myBIS* automatically determines the necessary course of action. Based on business rules, wages may be automatically added to a claim and a monetary redetermination processed including automatically sending an IB-5 indicating the wages are being used. If the business rules dictate that the wages should be returned, which may be the case if the received wages do not increase the claimant's monetary determination or make a monetarily ineligible claim eligible, the wages are automatically returned to the sending state via an IB5. The *myBIS* automated IB-4 Request, IB-4 Response, and IB-5 process for Florida CWC expedites UC staff activities and customer turnaround time as staff only review responses as necessary based on defined

Interface	Data Collected in myBIS	Data Shared with Partner Agency
Immigration and Naturalization Service (INS)	• Citizenship status • U.S. Work Authorization documentation	• U.S. Work Authorization verification
Florida Department of Corrections	• Claimant personal and identifiable information	• Incarceration status
Previously Identified Financial Institutions	• Claimant payment method • Bank account information • Replacement of failed EFT transactions	• Direct deposit transaction • EFT transactions • Unique EFT trace numbers
Interstate Connection System (ICON)	• Employer separation and wage information • Combined Wage Claim (CWC) requests	• Wages earned in a state other than Florida • Interstate employer wages in the base period • Combined Wage Claim Request to Transfer Wages (IB-4) transaction • Report of Use of Transferred Wages (IB-5) transactions • Transferred Wages (IB-6) transactions
US Department of Labor O*NET	• Claimant's occupational code	• Occupational codes • Employer tax account information
Federal Centralized Claims Center (FCCC)	• Military separation and wage information • Federal separation and wage information	• Military and federal wage information • Confirmation of separation information for military claimants • Confirmation of available federal wages
Employ Florida Marketplace (EFM)	• Job service registration information for new claimants	• Registration with Florida Workforce Services

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Figure 5-3. Integration with partner agencies' information systems facilitates data sharing, expedites claim processing and claimant validation, and removes manual communication

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business rules. IB-5s are automatically created throughout the life of the claim when updates requiring a revised IB-5 are made. This interface also reduces customer turnaround time as out of state wages are often automatically added to the claim and the claimant's monetary determination automatically redetermined to immediately reflect the out of state wages.

The second portion of the ICON interface is the processing for incoming IB-4 Requests. *myBIS* automatically receives and processes incoming IB-4 requests each night. Based on defined business rules, an IB-4 Response may be automatically created and sent without user intervention. If the IB-4 Request meets defined criteria requiring staff review, a work item will be created for the IB-4 Response to be manually created and sent via the ICON interface. Additionally, if an IB-5 is received requiring staff review, a work item will be created for follow up. IB-5 work items can be created based on defined business rules such as the amount of used wages on the IB-5 not matching with the amount of wages sent on the IB-4 Response.

myBIS will interface to validate bank account information helps detect incorrect bank information before payments or repayments are issued in order to correctly pay or receive payments on claims. Other examples of interfaces with financial institutions include an EFT interface with the bank to issue EFT credit transactions. In addition, *myBIS* would assign a unique EFT trace number to each EFT payment attempted for tracking purposes.

The *myBIS* correspondence solution provides language and delivery flexibility as well as cost saving opportunities. *myBIS* can issue correspondence both via paper based mailings and electronically which can reduce postage, handling, and printing costs. *myBIS* correspondence can be generated in English, Spanish or Creole based on a claimant's language preference.

myBIS correspondence bundling functionality packages multiple pieces of correspondence generated for a single recipient over the course of a day in the same envelope. This benefits AWI by reducing postage costs. From a customer perspective, correspondence recipients receive fewer pieces of mail, which makes the overall Agency communication less likely to be confusing.

The Electronic Case Folder also contains functionality that allows quick and easy correspondence reprinting if necessary. Outgoing *myBIS* forms for return display barcodes containing document information. When a barcoded document is scanned into *myBIS*, the barcode will be recognized and the document can be automatically associated to claimants, employers, issues, or claims, based on the barcode-embedded data. This will make it easier for UC staff to track status of claim documents. Figure 5-4 illustrates a few of the many opportunities for improvement in the claims intake business process.

Continued Claims

myBIS contains a comprehensive approach to process and maintain continuing claims. We understand that claimants have different needs requiring the State to offer multiple channels for customers to submit continuing claims. The *myBIS* continuing claim solution provides three channels to submit continuing claims; the Self Service portal, telephone/IVR, and the UC staff integrated desktop. *myBIS* continued claim processing includes a determination of the eligible continued claim weeks along with the eligible claim program type for each week end date.

myBIS can compare continued claim answers with a claimant's issues and determinations to determine for a specific claimant and specific week end date the set of expected answers. Based on the claimant provided responses and expected answer set, *myBIS* creates work items and issues as necessary based on defined business rules.

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Shortcoming	Impact	Opportunity
Manual claims entry requires high level of clerical work by staff	Value added tasks, such as job services are neglected	Updating the internet channel for Claims Intake reduces staff intervention and enables them to focus on other tasks
The manual processing of claims increases the opportunity for data entry error	Data entry errors reduce payment timeliness and increases overpayments	Automated claims intake via the web reduces manual processing and has built in validation rules
The intake process and work registration process occur as separate functions	There is currently no assurance that claimants are appropriately registering for employment	Re-employment services are updated as part of the intake process, resulting in a higher rate of claimants registered for work
Verifying claimant identities is complicated through input errors and fraudulent activities	Benefits are paid to the ineligible claimants	Automated additional authentication with outside systems for claimant verification

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Figure 5-4 . myBIS improves claims intake processes, reduces errors, lessens manual intervention, speeds reemployment and aids in detecting fraud to help AWI achieve its objectives

We propose expanding the customer's continued claim filings with the Agency through a Self Service Portal. Frequently requested documents for certification purposes will be available on this site. This will bring the current manual processes into the 21st century as claimants move to e-filing and online submission.

The Self Service Portal can expand the existing continued claim access to nights and weekends, providing 24x7 availability for claimants. By providing new continuing claim channels to claimants, UC staff will spend less time submitting paper continuing claims. UC staff will still have the ability, however, to submit continuing claims via the integrated desktop if need be. Moreover, UC staff with appropriate security rights will be able to make corrections to previously submitted continuing claims via the Integrated Desktop. For certification updates, *myBIS* will create a new certification version so that a full history of a continued claim is preserved.

Regardless of the continuing claim channel, continuing claims are processed using a consistent set of business rules. The system sets the certification statutes based on business rules. For any necessary issues or work items, *myBIS* automatically adds and schedules the adjudication issue and creates the work item for UC staff to follow up with the claimant on a suspended certification.

Wage Determination

During the initial claim setup process, *myBIS* interfaces with the employer wage system to retrieve regular and alternate base period reported wages for the Social Security Number. If the claimant reports that work for an employer in the base period but the employer did not report wages for the claimant or the name does not closely match the reported wage name, the claim is sent to the "in process" claim queue for staff review to determine the appropriate wages on the claim.

If UC staff adds new wages or modify employer reported wages for a claimant when filing the initial claim via the integrated desktop, a work item is sent to determine if the appropriate documentation of the wages has been provided. Filing via the integrated desktop also provides a callout to the user if the reported wages name does not match the claimant name. By identifying reported wage name mismatches, *myBIS* helps identify wages upfront that should potentially not be included on the claim. Catching incorrect wages upfront during the claim process can help prevent overpayments before they happen.

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myBIS also contains a military employer specific wage calculation to simplify military quarterly wage calculations and reduce calculation errors during the intake process. For claimants who provide a DD-214, *myBIS* automatically calculates wages based on the employment period, last pay grade, accrued leave, and number of days lost, as illustrated in Figure 5-5 .

Once the initial claim is filed, correspondence is sent to each employer with the wages on the claim and the claimed separation reason. The correspondence provides a barcoded protest form if they find any of the claimant information to be incorrect. When the protest form is scanned into the system, a work item would be generated informing UC staff that protest documents on the claim have been received and trigger user follow up on wages.

System validation of wages assists in processing monetary redeterminations and payment adjustments. Furthermore, *myBIS* can automatically process a redetermination for associated claims. Entry of determinations and decisions, wage updates and affidavits, and claim maintenance will trigger payment adjustments that are performed during nightly processing.

After the initial claim is filed, base period wage redeterminations are automated in *myBIS* when wages are received from external parties assuming the business rules do not preclude the system from automatically processing the response. In particular, *myBIS* will automatically process wage updates and the associated monetary redetermination based on received IB-4 Responses and FCCC responses.

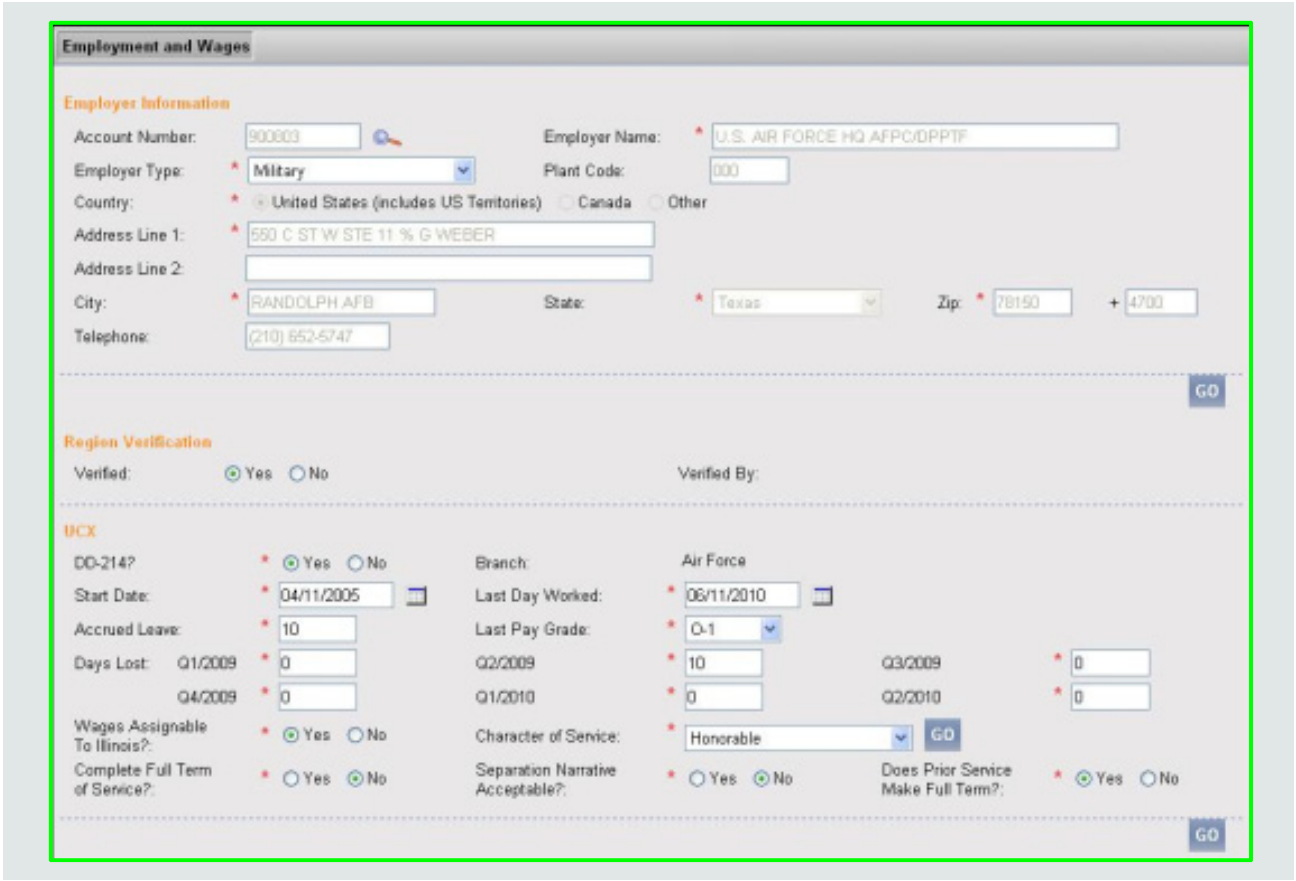

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Figure 5-5. Manual Wage Calculations are no longer necessary. Now UC staff will only have to enter the determining the military factors and the wages will auto populate

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myBIS will also automatically process a monetary redetermination based on UC staff adding, modifying, or deleting wages or changing the Date of Claim, base period, or benefit year begin date on a claim. The *myBIS* monetary redetermination process includes, as necessary, sending new notices to the claimant and employers, resending IB-4s and IB-5s, creating history transactions and work items, and queuing affected weeks for adjustments in case a supplement or overpayment is required. This automated monetary redetermination processing reduces manual processing which is turn improves customer response time.

Special Programs

Best Value

myBIS is easily configurable to simplify the addition of new programs. The base system was recently updated after the initial design, development, and test to incorporate new program types due to changes in federal regulations, such as Extended Benefits (EB) and Extended Unemployment Compensation (EUC). *myBIS* contains functionality that automatically sets claimants up on special programs based on business rules and regular UC exhaustion or expiration.

Short Time Compensation (STC). Accenture understands Florida's STC specific functional requirements. Accenture will work closely with AWI to design *myBIS* to provide Florida with a first-of-its-class system. AWI staff and customers will update effective claim dates and receive notifications of impending plan end dates. Employers participating in the STC program can reapply for the STC using already saved information, and claims may be transferred from one STC plan to another.

Vendors stating that 80 to 90% of an existing system's functionality meets Florida's STC needs may be demonstrating a lack of knowledge about the unique program requirements. Our UC experience includes design, development and implementation of state-specific functionality similar to AWI's STC requirements. Accenture's UC experience as well as our proven methodology provides our team with the tools to work with AWI to quickly design, develop, and test STC requirements.

Trade Readjustment Allowances (TRA). *myBIS* has a robust Trade Readjustment Allowances (TRA) claim and eligibility determination process. To start the TRA process, *myBIS* will automate the process to load TAA petition information into *myBIS* resulting in up-to-date petition information for TRA claimants and reducing the paper transfer and manual entry of petitions.

myBIS will upload Trade Assistance Act (TAA) petitions from the United States Department of Labor (US DOL), eliminating the need to manually monitor and update TAA petition information. In addition to automatic TAA petition processing, *myBIS* contains functionality to manually enter and maintain TAA petitions. *myBIS* will notify the State TAA Coordinator when a TAA petition requires an amendment.

During initial claim entry, *myBIS* automatically cross checks employer separation and wage information to determine whether a claimant may be eligible to file TRA under a certified TAA petition. If the claimant is potentially eligible, the claim intake process is extended to include TRA eligibility information including determination of a qualifying first and last separation and TRA monetary eligibility.

myBIS also contains separate sets of TRA rules based on the petition filing date and functionality to provide the choice to receive regular UC or TRA benefits in accordance with new 2009 legislation. Where dual eligibility exists, *myBIS* notifies the claimant via correspondence that can be automatically or manually generated. Continuing claims can also be suspended until the claimant returns the response specifying the preferred program. After a program selection is made, suspended weeks are queued for payment under the chosen program.

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Once a TRA claim is filed in *myBIS*, a claimant is able to submit continuing TRA claims and receive TRA benefits assuming the claimant's current eligible claim is TRA. For TRA continuing claims, *myBIS* automatically determines ongoing eligibility based on training statuses for the specific week. If a claimant exhausts Basic TRA or the Basic TRA benefit period expires, *myBIS* automatically sets the claimant up to receive Additional TRA benefits if they meet the eligibility requirements.

The automatic creation of Additional TRA periods reduces staff intervention to set claimants up which allows staff to focus on other value-add tasks. *myBIS* also contains functionality to set up a claimant to receive Remedial TRA benefits after completion of the Additional TRA period. In accordance with federal requirements, *myBIS* reduces the TRA maximum benefit amount by the amount of EUC and EB payments made when necessary.

Lastly, *myBIS* allows AWI staff to perform TRA outreach to potentially eligible claimants. *myBIS* sends correspondence to identified claimants to inform them of their potential eligibility including outreach meeting details if applicable. This functionality allows AWI to reach out to customers to provide proactive service to the community.

Disaster Unemployment Assistance (DUA). UC requirements differ from state to state. As such, there is no UC system that can be plugged in and meet all of AWI's specific requirements. It is vital that a transfer solution provide flexibility to allow easy customization to meet AWI needs. *myBIS* is both robust and flexible. *myBIS* can be configured to process additional program types and manual configuration of eligibility requirements and continued claim questions for additional program types as needed.

myBIS automatically determines program eligibility, based on business rules and can determine if a claimant is eligible for Disaster Unemployment Assistance (DUA). This will allow a claimant to file initial claims, file continuing claims, and receive DUA benefits. *myBIS* will also provide functionality to allow authorized users to override DUA claim eligibility. As previously mentioned, the *myBIS* solution was recently updated to incorporate new federal programs after the initial design, development, and test.

This illustrates the solution's flexibility to add new programs such as DUA. With the necessary claim and eligibility constructs in place, we will be able to hit the ground running to meet AWI DUA requirements. We have experience working collaboratively with UC staff to design, build and test new program functionality, and we are prepared to work with AWI to incorporate DUA requirements in *myBIS*.

Issuing Benefit Payments

The Payment Processing portion of *myBIS* accounts for benefits paid from initial payment issuance to trust fund accounting of benefits at the macro level. The *myBIS* comprehensive solution allows AWI staff to identify payment deductions, view payment details and accounts for individual payments in daily, monthly, quarterly and yearly financial statements. No more reviewing a claimant's history to determine if they have already been paid benefit weeks, *myBIS* does that for you!

The *myBIS* application removes manual payment processing. We understand that issuing benefits is mission critical for the success of the Agency. *myBIS* is a stable and reliable integrated system, which provides transparent and accurate end-to-end payment processing and accounting.

Before issuing benefit payments, *myBIS* does the initial benefit eligibility legwork for staff by determining if the claimant is monetarily eligible and non-monetarily eligible to receive based on any adjudication issues. If a week passes the monetary and non-monetary eligibility criteria, *myBIS* next checks if any deductions should

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be taken from the benefit payment. Possible deductions include child support, federal tax withholding, holiday or vacation pay deductions, unavailable day deductions, and wage deductions.

Payment deductions are recorded as a separate line item at the week level to provide clear payment calculations to both staff and customers. Lastly, the system determines if any overpayments can be recouped from the payment or if any penalty weeks need to be served. Our experienced design team will work with AWI to incorporate Florida-specific laws into payment business rules to calculate the final benefit amount. *myBIS* groups payment for all claimant benefits on a given day in a single payment. Figure 5-6 shows the lifecycle of a payment in *myBIS* once monetary and non-monetary criteria have been met.

Payment for different weeks may be grouped together, but the calculation details continue to be stored on a weekly level to aid in claimant inquiries. The payment breakdown at the weekly level is accessible by both customers and staff; staff can access the payment information on the integrated desktop while claimants can retrieve payment details on the Self Service Portal. By providing the line by line calculation of each payment and making this same payment information accessible to both staff and claimant, payment inquires can be quickly resolved by both customers and staff.

Every dollar of a payment is accounted for on the payment detail screens. In addition to the detailed breakdown of a payment, the payment screens also display payment status and details of the payment method to help users track a payment. If requested by a claimant, a worker can also generate an 18-month benefit history either locally printed to hand to the claimant while they are in the office or centrally printed to be sent out at night.

myBIS allows claimants to receive benefits in less time as funds are electronically transferred directly to their account or debit card the same day the payment is issued. Payments are issued via direct deposit by Electronic Funds Transfer (EFT) or debit cards. Warrants may also be printed and issued based on claimant preference. Electronic means of issuing payments and managing payments lead to improvements in the overall payment process by decreasing forgeries, decreasing duplicate payments, and allowing for easier stop payments.

myBIS provides stronger management of cash and accounting controls. *myBIS* contains standardized receivables, collections, and recoupment processing to increase Agency benefit payment efficiency.

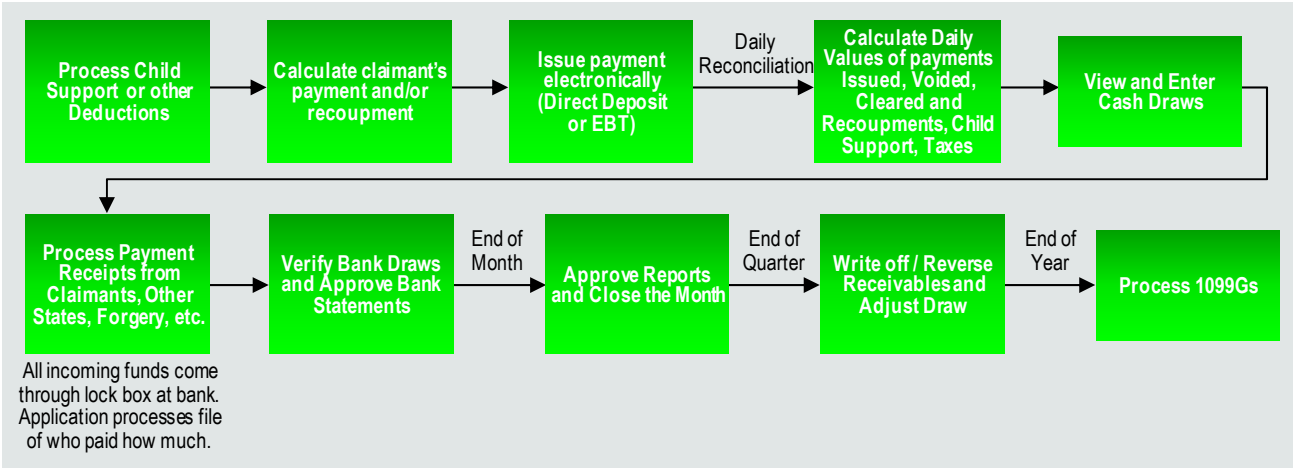

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Figure 5-6. High level overview of integrated benefit processing

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This one-stop shop for all payment information will maximize the efficiency of agency staff by reducing guesswork and manual calculations currently involved in issuing benefits.

Adjustments. When a payment week is adjusted due to a supplement or over issuance, the worker is able to view a history of payment calculations for the week. The payment details screens provide a before and after snapshot of the calculation at the week level as well as displaying the difference between the versions. Staff will have the information and tools they need to answer any claimant question and to fully understand the "why" behind a benefit issuance.

Improvements in Claims Intake, Continued Claims and Special Payment Processes result in less manual processing for the Special Payments Unit

- Claims Intake validates Social Security numbers provided by claimants
- Data validation enforced in self service continuing claims reduces manual corrections required to issue payments
- Claimant history integrated among process areas and automated so Special Payments Examiners no longer have to manually determine if a claimant has already been paid weeks – the system calculates this automatically

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myBIS automatically processes payment adjustments and resulting supplements and overpayments. UC staff do not need to manually issue payments and supplements or set up overpayments based on updates in different process areas. *myBIS* automatically processes adjustments due for claim maintenance including wage updates and changes in program eligibility.

If a claimant becomes ineligible on a program for a week he/she was previously paid and is eligible on an additional program for that week, *myBIS* will automatically adjust the week to the new program and process all accounting adjustments due to the program change. *myBIS* also automatically processes adjustments for continued claim updates, adjudication determinations, and appeal decisions.

The ability of the system to calculate and process adjustments initiated by claims, continuing claims, adjudication, and appeals will minimize incorrectly issued benefits and ensures accuracy when processing payment updates. The level of detail available within *myBIS* for payment calculations allows transparency for all stakeholders: customers, staff and management.

Issuing Supplements and On Demand Payments. Outside of weekly issuances, *myBIS* would be fully equipped to create and re-issue supplemental and on-demand payments to claimants, employers and second endorsers on a daily basis. Details of on-demand payments and overpayment refunds are viewed alongside payment details, providing UC staff with a single point of reference for all benefit issuance information. Similar to weekly benefit payments, *myBIS* combines all of the payment calculations performed during a business day in order to issue a single, all encompassing payment, during nightly batch processing.

In the case of a supplemental payment, the amount is automatically calculated by *myBIS* at the time the adjustment is entered. This applies to additional wages added to a claim and used to recalculate monetary determination, an issued determination being entered allowing benefit payment, appeal granted, or overturning of an overpayment. The payment flexibility offered by *myBIS* will allow UC staff to provide a higher level of customer service to customers than has been experienced in the past.

Accounting

myBIS offers the Agency improvements in payment disbursements and the management of disbursements. *myBIS* rolls up all payments for a given day, applies payments to accounting funds, and

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stores the accounting information for reference. This allows Agency management to reconcile numbers to close the books at the end of each day, month and quarter. For daily reconciliation, Cash Draw screens are included in *myBIS*. This will enable a worker to reconcile the amount of benefits paid with the actual cash withdrawn from agency accounts by bank.

If for some reason these numbers do not match, the system allows authorized users to make manual adjustments to the daily draw numbers. *myBIS* also provides this functionality for special programs cash draws, such as TRA, DUA and ATAA. Our design team will work with the agency to customize *myBIS* to account for additional special program accounting as needed.

myBIS directly interfaces with external stakeholders, including banking institutions to reconcile accounts and maintain overall program accounting functions. When a claim is filed and the claimant selects EFT direct deposit as the preferred method of payment, *myBIS* interfaces with the selected bank to verify the account number and institution routing number are correct. Only upon confirmation of this information is a benefit payment issued to the claimant.

Today, *myBIS* has the ability to integrate and import agency bank statements. Throughout the design process, this process can be updated for AWI needs. The daily display and review of the bank statements make for a streamlined month end process. The ability of *myBIS* to facilitate monthly approvals will minimize audit efforts for the agency. Once a month has been closed, all bank statements and cash draws are read only. This minimizes the possibility of any errors looking back, and locks in month end values for the future months.

The integration of benefit payments, overpayments and collections activities into a consolidated accounting function allows the Agency to have a single dashboard of reference for funding information. *myBIS* rolls up all write offs, reversals and adjustment information for approval each quarter. Continuing to support the agency's accounting transparency, *myBIS* also maintains quarterly reconciliation of employer charges by employer type UI, UCX and UCFE.

1099-G

1099-G tax forms are created on an annual schedule and provided for claimants during tax season. Claimants have the ability to request a replacement 1099-G via the enhanced IVR functionality or by placing a call to the call center. Requests received by UC staff for replacement 1099-G forms are handled by internal *myBIS* screens. Once the 1099-G is generated by the system, the image is stored in the Electronic Case Folder (ECF).

The user may simply request that a duplicate copy be generated and mailed, or an amended 1099-G be generated if necessary if overpayment balances are repaid. These can be printed both centrally and locally, with the address of record being pulled from a central Claimant Maintenance repository. Allowing all claimant-specific information to be stored in one location provides easy retrieval for all units of the Agency.

Streamlining availability of information and consistency of information will benefit all users. This feature provides AWI with the ability to reproduce the documentation needed by the client as evidence of benefit payments received throughout the tax year.

Electronic Case Folder

To provide a single source of correspondence information for workers, *myBIS* includes an integrated Electronic Case Folder (ECF) that will replace the physical case files that are currently maintained by the Agency. The ECF allows one access point for workers to quickly retrieve all case materials and claim documentation. Claimant and employer correspondence both sent from and received by the system are

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recorded in real-time. The Electronic Case Folder will provide workers with the ability to gather case file information as it existed at the time a determination was made, in order to assist with adjudication, appeal, investigation or collections processes.

Barcoded documents are scanned upon receipt, systematically indexed to the case file, and are then retrievable through the *myBIS* application. Indexing information can also be manually entered by a worker if needed. If a document is indexed in error, our *myBIS* solution offers the ability for a document to be re-indexed in a variety of ways, including association to another claimant, case or issue. We will work closely with your subject matter experts to customize the workflow that is triggered upon document receipt, prompting workers to complete a task within the system.

The ECF is searchable by claimant, employer and document. In addition, three functional areas have their own ECF that can be accessed by workers with the appropriate security rights. This feature protects sensitive information contained in the Adjudication, Appeals and Benefit Payment Control sections of the application.

As part of our Florida UC solution, we bring an imaging and document management solution from Image API. *myBIS* would interface with Image API's latest imaging software to provide robust ECF storage, retrieval, re-indexing and association functionalities. This modernized document intake and storage process minimizes the workload of UC staff in maintaining physical case folders and maximizes the ability for Agency staff to have essential documentation available at their fingertips.

Customer Information Requests

Another automation enhancement that will benefit AWI is *myBIS* processing of customer information requests. Claimants and employers will be able to submit a request for information and documentation using the Self Service Portal. Depending on the type of information or documentation requested, the system may auto generate the information and submit it to the petitioner, or notify UC staff of this request through the auto creation of a Task or Assignment. Record requests will be logged and tracked in the system.

Audit

myBIS includes an Expanded Claims History (ECH) function to track user and claimant interactions as the claim moves through the claims lifecycle. The Expanded Claims History screen provides a centralized location where UC staff can find details of claim updates made over time including the activity type performed on the claim, UC staff member who made the update, location where the update was performed, date and time of the update, and the previous and new values. The ECH also provides your staff with the ability to generate historical records or notes associated to a claimant and claim to document actions taken on a claim for tracking and informational purposed.

Reporting

Compliance with federal reporting is an important part of AWI's business. Accurate and timely reporting on claims, participants, and funding plans is critical. *myBIS* would provide AWI with flexibility and scalability for integration and automation of predefined and on-demand reports. The solution allows for real time and historical outputs that are consistent with federal reporting requirements.

myBIS uses Business Objects technology to harvest report data from the UC data warehouse and can be configured to generate reports at any determined frequency (weekly, monthly, and quarterly). Business Objects is easily configurable so AWI would acquire a variety of reporting capabilities for accurate and timely reporting, and would gain control over how data is presented and formatted. Business Objects allows for a variety of formatting alternatives.

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Much of the data that is captured in *myBIS* screens can be pulled into a report. We will work closely with you to identify the federal data requirements that are needed, identify the data validation and security procedures that best serve the Agency and the output format requested by State and Federal Agencies.

myBIS would provide AWI the ability to capture and transmit data to the United States Department of Labor (US DOL) including Florida's plan for utilization of UC resources, validated workload information, employer taxable status, re-employment and eligibility assessment information, and provide the National Appeals Office with special programs decisions claims as well as provide data for general statistical reporting.

AWI management would also be able to use the strong reporting functionalities built into *myBIS* to track and monitor claims and staff performance. UC staff and management will be able to access predefined reports for ongoing reporting needs as well as on-demand reporting that is staff-defined, and allows for real-time selection of desired reporting criteria.

Data such as personal information, claim details, state wages, number of days to work IB-4, and other information that is stored in *myBIS* will be accessible to UC staff and management in the form of reports or as search results. *myBIS* uses advanced reporting tools to add value to AWI data analysis.

Workforce Services

Integration with Workforce Services provides opportunities to get claimants back to work and to reduce the average life of a claim. When a claimant files a claim via the *myBIS* Self Service Portal or the internal application claim filing process, the system automatically registers the claimant with Florida Workforce Services. This emphasis on re-employment activities at the time the claim is filed offers the Agency faster re-employment rates and more accurate employment placement. This helps align the customer with new employment opportunities based on their skill set and reduces the duration of benefit payments on the claim.

The *myBIS* solution will automatically register the customer with Workforce Services via the Employ Florida Marketplace (EFM) interface when a claim is filed. As shown in Section 5.5 Value Added Services, we offer an optional product, ELISE, that can enhance EFM. ELISE is one of the most sophisticated job search engines in the world. It matches customers to jobs based on their preferences. Matches are immediate and occur continuously once customers have indicated preferences in the EFM system. Job matches are prioritized and ranked.

Customers will simply enter their work preferences and other personal information and the system does all of the searching for them. Not only that, if the customer finds that too many or too few matches are returned, their employment preferences can be easily updated and a new list of employment options is generated immediately.

This immediate turnaround in relation to changes in preferences will allow the customer to find work suited for them more quickly. The financial benefit for the customer in finding work as soon as possible is obvious, as the average benefit amount paid weekly is significantly less than the median weekly wage amounts for Floridians.

Adjudication

Adjudication within *myBIS* has been designed and implemented to support claimants, staff and management's adjudication needs. Role based security definitions provide supervisory designations in *myBIS* for adjudicators to allow review and modification of work.

The Adjudication process begins when potential monetary or non-monetary issues are discovered within the system or from various inputs, such as web, phone or incoming mail. A potential issue may arise from the

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claimant's "non-preferred" answer to eligibility questions within the claims application or the certification process. Issues may also be discovered by an employer and escalated to the Agency. When necessary, the discovery of a potential issue will cause the claim to be systematically pended in *myBIS* until the issue is resolved. Scheduling of adjudication interviews is handled by the system scheduler.

As shown in Figure 5-7, our solution focuses on automating the adjudication process while integrating claims and payments information as part of the Agency's overall approach to case management. In order to make a determination or redetermination on an issue, a fact-finding interview will be scheduled with an agency representative, the claimant and other relevant parties, i.e. attorney, witnesses, and employer.

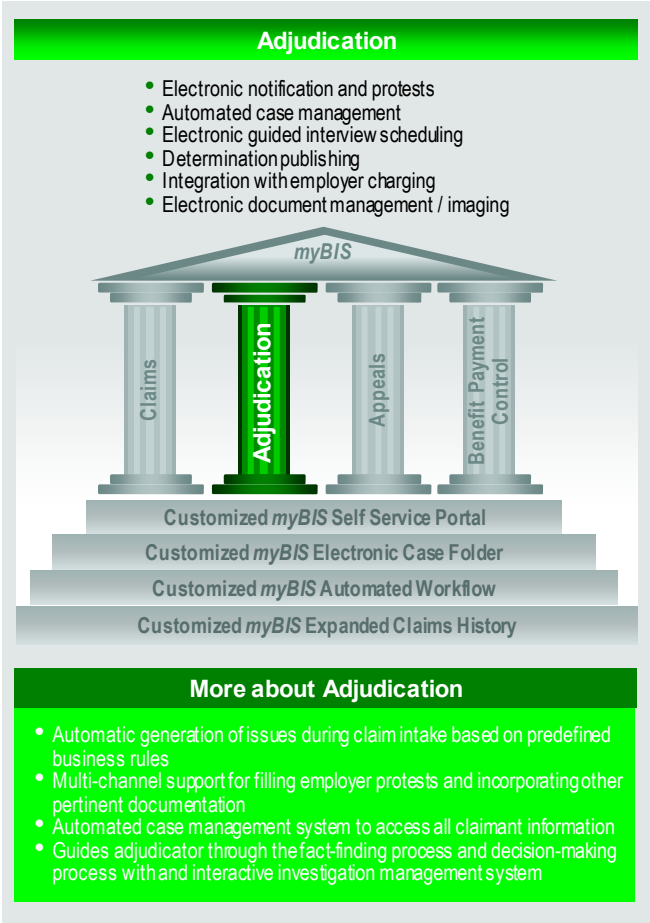

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Figure 5-7. myBIS Adjudication

When the determination is issued in *myBIS*, the claim and related payment weeks are updated to reflect the determination. If any overpayments or underpayments exist as a result of the determination, the adjustment process is triggered, and *myBIS* creates the necessary overpayments notice or issues the expected benefits. The advantage of such a fully integrated system is that the change to an adjudication decision permeates through the claim so that the impacts of the decision are viewable to any workers who are accessing the payment information.

Automated processes within *myBIS* help Adjudicators to make more informed and consistent determinations in a timelier manner. Throughout the Adjudication process, the system provides issue specific facts and determination statements specific to the section of law. Adjudicators select the appropriate facts based on the details captured and "build" the determination.

This helps prevent users from accidentally entering determination details that do not coincide with the facts of the case. Determinations will automatically trigger payment adjustments, including supplements and overpayments, based on the decision and perform all necessary maintenance.

Once a determination is made on an issue, if any details relating to that issue change and there is a need to re-determine the issue, the history of the original determination is saved, providing the ability for the user to view the original determination and any prior re-determinations.

This transparency will benefit the Agency's Quality Control and Appeals staff. *myBIS* will generate and send correspondence to all interested parties, which is then stored in the Electronic Case Folder for easy retrieval in the future.

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Determining Employer Chargeability

myBIS calculates the wages percentages for all program types automatically when a claim is filed. The system also automatically updates these wage percentages when wages are added, updated or removed from a claim and the monetary determination is recalculated. In conjunction with automatic updates to wage percentages the benefit charging amounts are automatically adjusted to reflect changes in the wage percentage.

myBIS will interface with the charging system via a batch job to receive exceptions that are created. The system would be able to create work items to handle the aforementioned exceptions. Payment stops are controlled by issues and determinations and prevent benefit payment on issues pending adjudication.

myBIS allows payment for all weeks for which the claimant has certified, provided no issues exist on the claim preventing payment. When a claimant is paid, the system will automatically charge the employer account based on wage percentages that are automatically calculated and maintained in the system for each claim.

Appeals

myBIS has many Appeals Process features, as shown in Figure 5-8, that can facilitate and balance referee workload via work item automation. Automated Appeals scheduling creates work items for referees and moves cases through the process, leading to more informed and consistent determinations and decisions made more timely.

Our experience indicates that the number of appeals can be reduced substantially, because of the transparency afforded by the claims, payments and collections benefit calculations.

The determinations and correspondence generated by *myBIS* provide claimants with user-friendly explanations of the basis for decisions with traceability to policy.

Docketing, Scheduling and Workflow Queues. The Appeals business function within *myBIS* provides paperless appeal cases with ease of access to all UC staff with the appropriate level of security.

The system tracks each appeals case with a single docket number as it progresses through Benefit Appeals, Unemployment Appeals Commission, and the Circuit Court.

The process begins when a request for an appeal is received via mail, phone, or online from a claimant or employer on a disputed unemployment claim. Within *myBIS*, when scheduled or rescheduled, the hearings will display on the appeals examiners' schedule. Hearings are held in

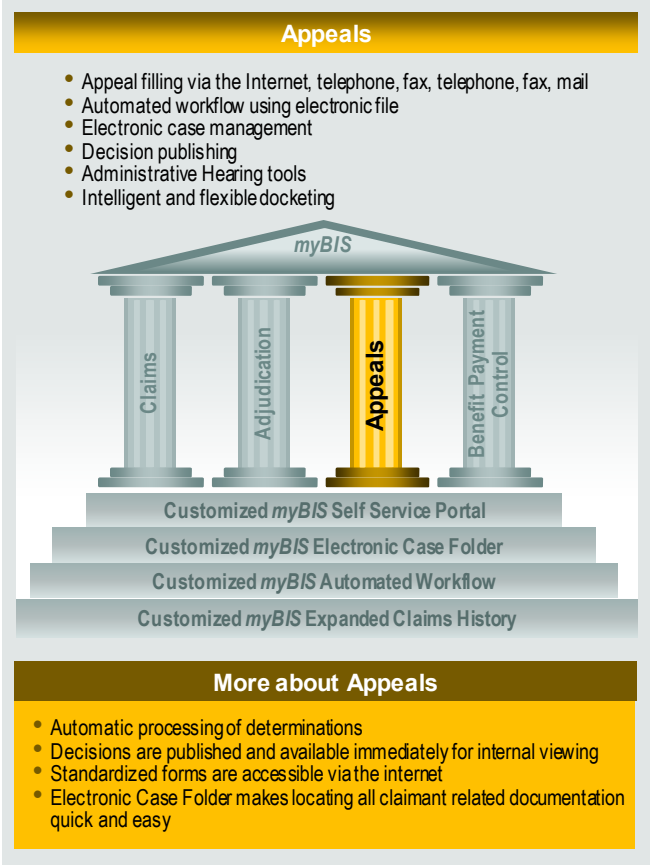

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Figure 5-8. myBIS Appeals

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person or via telephone, and can be recorded for easy retrieval. The system displays a graphical calendar of all hearings, which is sorted by resources belonging to specified groups. This can be configured to display resources based on a custom set of groups. *myBIS* allows agents, and contacts to be added to an appeal and automatically generates correspondence to those contacts when specified.

The appeals referee conducts the hearing, makes a written decision, and mails the decision to all interested parties. At all appellate levels, the written decision is also retained within *myBIS* through use of the Electronic Case Folder (ECF). Easing the written decision process, *myBIS* shows correspondence text to referees for review and edit prior to generating notices. The impacts of the decision are entered into the system and systematically calculated. This eliminates the need for workers to determine the impacts of their decisions, and also allows previous caseworkers to view the payment outcome of any higher-level decisions.

We recognize the multitude of alternative conditions that appeals may address; *myBIS* already has the flexibility to manage many of these situations. Appeals dockets in *myBIS* may have any one of over 30 docket statuses, which can be customized to include additional statuses if needed. At anytime, a docket can be cancelled if it should not be continued through the appeals process. The utility of the *myBIS* application allows Appeals Management to focus on quality and timeliness rather than processing.

The solution produces workflow queue items for appeals referees and other UC staff in an effort to move decisions to different levels and capture additional information. *myBIS* calculates the Age of Appeal based on a variety of criteria, which can be tailored to any configuration of dates and/or statuses. This will assist Agency staff in staying compliant with current unemployment law.

Once a decision is made, the system processes the result and triggers the payment or overpayment processing based on the outcome. Hearings are auto scheduled and the system sends notices to all parties involved. A comprehensive docket summary screen is provided for all UC staff with the appropriate security displaying detailed information for all levels – Benefit Appeals, Unemployment Appeals Commission and Circuit Court.

Best Value

The case management abilities of the myBIS application streamlines end to end appeals processing, reduces over issuances and minimizes the time needed by the agency to resolve issues impacting payments.

Integrated Data Storage and Docketing. *MyBIS* contains a fully integrated Appeal process from the Benefit Appeal level to the Unemployment Appeals Commission level and captures Circuit Court information. *myBIS* stores appeals documents electronically for faster retrieval, reducing processing time, costs and backlog. Using the established Electronic Claims Folder (ECF), referees can access previously made determinations and case information in one place. *myBIS* can attach additional documents as evidence to an appeal through document scanning.

An extension to the *myBIS* solution will allow for digital recording of the appeals hearings. This will allow staff to record interviews, save the auditory file and record additional comments to be saved. This functionality will allow easy retrieval of all document management items, as well as audio files if the need arises to provide this information to an outside court.

One benefit of *myBIS* is that the Expanded Claims History (ECH) provides an automatically generated log of actions performed on an appeal. This can be configured to include a variety of desired actions performed in the system. As evidenced, from beginning to end, *myBIS* provides transparency and consistency for the appeals unit. From streamlining intake and scheduling, through the processing of determinations and storage of docket information, *myBIS* increases productivity. Our experience, combined with *myBIS* and an analysis of

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the Agency's Appeals processing needs will provide AWI with a solution that will significantly improve and maintain the current appeals processing standards.

Quick Text. Based on statutes and legal precedents, *myBIS* includes more than 150 issues with pre-determined decision language and "quick text" that pops up for the specific issue being decided to reduce errors and quicken the process. Appeals users can use the Quick Text feature to insert personalized pre-saved text into their decisions that will be included in the correspondence generated and sent to the claimant and other involved parties.

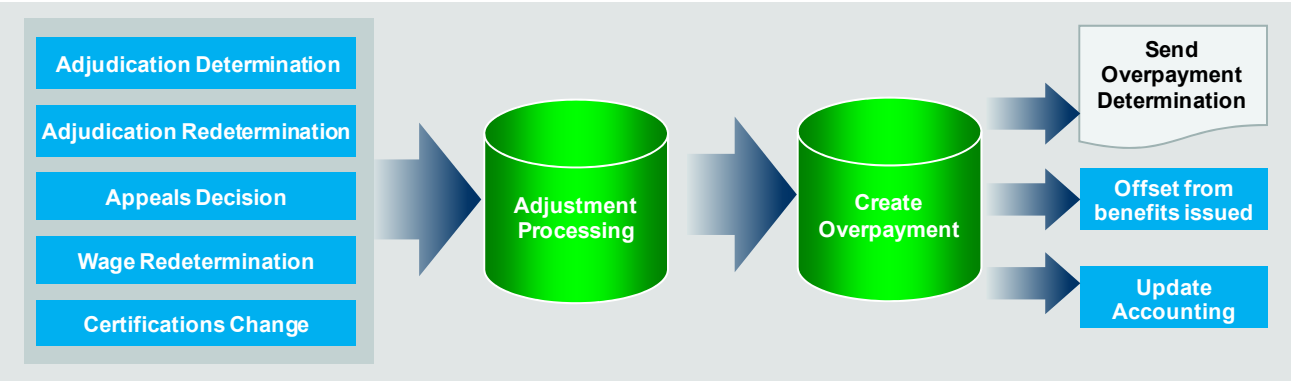
Benefit Payment Control (BPC)

The *myBIS* solution offers an integrated approach to all areas of Benefit Payment Control (BPC). This will enable AWI to limit the number of erroneous payments or overpayments by focusing on prevention from the moment a customer initially files a claim. In addition, continuous early detection is possible with BPC functionality that is fully integrated with Adjudication, Appeals and all Continued Claims activities. We recognize that integrated Overpayment processing is critical to help the Agency improve debt recovery.

As shown in Figure 5-9, determinations, decisions, certification changes, and adjustments in a claimant's monetary eligibility trigger the system to automatically adjust payments and determine if an overpayment or underpayment has been made. By creating and processing overpayments as soon as they are realized, the State is better positioned to recover the monies through repayment plans, offsets, and other withholdings.

The *myBIS* solution creates a single overpayment record for the Weekly Benefit Amount (WBA) and Penalty Weeks. This eliminates the need for the UC staff to adjust benefit overpayments. AWI can take the appropriate action immediately while the claimant is still receiving benefits or shortly after their benefits have ended. AWI can use the *myBIS* solution to continue to take offsets or other withholdings when a claimant opens additional claims after the overpayment is created.

In an overpayment situation, the system automatically records the overpayment, which is then associated by week with the issue that created it. The system consequently also sends related correspondence to the claimant, while recording a soft copy version in the Electronic Case Folder (ECF) for easy retrieval in the future.



2 FLAWI 039

Figure 5-9. When a change is made which results in an overpayment, the system automatically generates an overpayment, a notice, and updates the payment accounting without staff intervention

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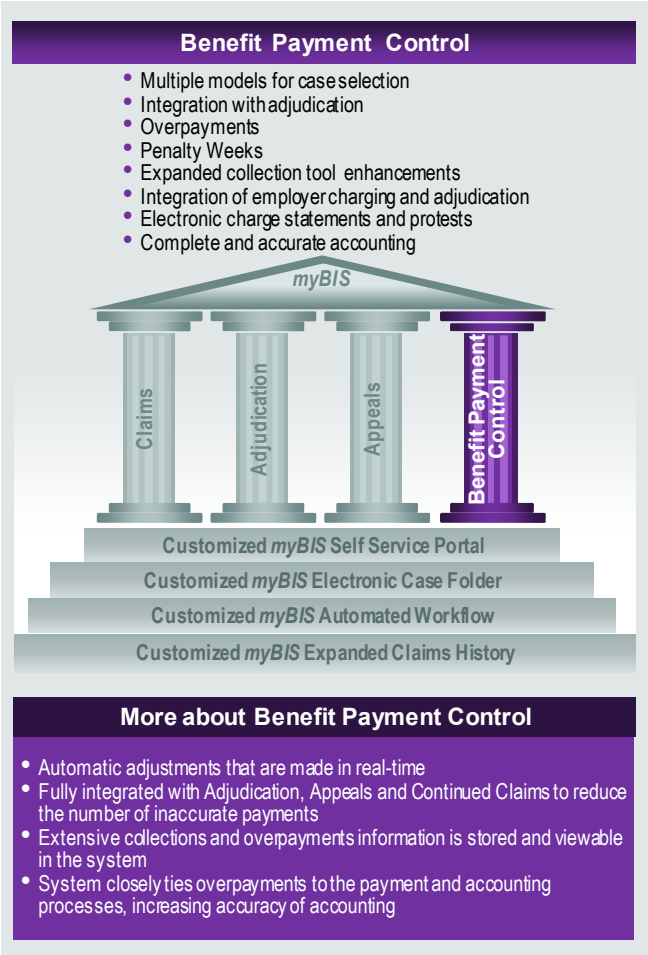
Figure 5-10 illustrates the BPC functionalities of *myBIS.* UC staff will have details regarding overpayments and collections for each claimant given the robust Benefit Payment Control functionality of the application. From a central Overpayment Detail screen, UC staff are able to view a list of overpayments, including details on payment plans, bankruptcies, judgments, interest collectable, and pending payments from other parties.

The close integration with payments, adjudication and appeals is demonstrated by the applications' ability to display not only the impact, but also the number of changes that have affected each overpayment. In conjunction with viewing Overpayment Details, a comprehensive Overpayment Collections screen allows overpayments to be suspended, written off, reversed and restored.

UC staff will also be able to record Chapter 7 and 13 bankruptcies. The solution's built-in business rules help keep the Agency compliant with bankruptcy and collection statutes. UC staff will find it easy to enter, track, maintain and update bankruptcies in *myBIS* user-friendly screens. Once the bankruptcy type (e.g. Chapter 13, Chapter 7), filing date and other applicable details have been entered, the system follows rules to cease collection activities such as sending correspondence and offsetting, as specified by law.



1 FLAWI 138

Figure 5-10. myBIS Benefit Payment Control

With Overpayment Determinations and other correspondence stored in the Electronic Claims Folder (ECF), the time and effort needed to assemble and print a case file for submission to a State Attorney or Civil Court is reduced.

Once a decision has been made, *myBIS* enters a judgment amount and calculate judgment interest after hearings. If an overpayment meets the Statute of Limitations for collection, the system automatically flags the records for pending write off.

In addition to proactively managing Overpayments, UC staff will count on the added benefit of running customized Cross Matches to determine if claimants have received benefits while working and earning wages or if a claimant is ineligible to receive benefits due to re-hire, incarceration, or death.

The various Cross Match audits champion the Agency's goal to determine if there is a potential conflict. When conflicts are identified in these audits, the system will provide notification to the applicable workers. The Wage/Benefit Cross Match will receive wages from employers and will check for those claimants who have

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received benefits and wages in the same period. When incorporated into the solution, this process will run specific criteria to determine who to select and run through the cross match audit process.

myBIS will also integrate cross matches that include verifying new hire information to determine if a claimant was hired while receiving benefits. We will work with the Agency to determine the best approach to check filed claims for duplicate address and telephone numbers, and validating if a claimant was deceased while receiving benefits.

The Agency can benefit from several system channels for recovery of monies owed on overpayments

- Payments can be collected via cash, check and credit card
- Claimants can make payments online through the Self Service application
- Automated processing of claimant checks posted to a bank lockbox
- Systematic identification and processing of recoupment monies

FLAWI 139

myBIS could also handle an interstate cross match, which would enable UC staff to check quarterly with other states to determine if the claimant earned wages or received out of state benefits while also receiving benefits in Florida.

We understand that Cross Match is important for AWI. It identifies claimants who have incorrectly received benefits for various reasons and will prompt the Agency to perform the appropriate investigations/audits to recover debts owed by claimants. The ability to perform a match on information with other systems will significantly improve debt recovery.

Throughout their lifecycle, overpayments are closely tied to the payment and accounting automated processes, so that the system does the heavy lifting. This reduces the errors that are typically the result of today's manual processing. Overpayments are adjusted and setup prior to paying benefits that ensures that the Agency is able to offset the correct amount before money goes out the door.

The Overpayment capabilities of the system provide an integrated view and verify the fiscal impacts of actions taken across the application. It also facilitates accurate and transparent accounting practices when rolled up to a monthly, quarterly or yearly statement.

Collections Activities. The *myBIS* solution will provide AWI with the ability to accrue collections monies using various repayment methods. The solution systematically identifies and capitalizes on repayment opportunities. As a result of these efficiencies, UC staff no longer need to manually action payments when received, in turn minimizing the risk of user error and reducing UC staff workload.

It will be easier for the Agency to audit collection activities as the robust Benefit Payment Control collection screens show detailed overpayment and recovery information. In addition, the BPC capabilities in our Florida solution provides interfaces with external parties and agencies including the Comptroller and Attorney General's office in an effort to streamline collections. In coordination with AWI and your partner agencies, the system can be modified to solicit collections on your behalf from various levels of Public Court and external collections agencies.

When a payment is received, it is recorded as a receipt in the system and is linked to specific overpayment weeks. The system applies collections and recoveries to overpayments based on the hierarchy dictated by unemployment law. If no overpayments exist, a pending refund record is automatically generated, and is viewable on a refunds screen. If a payment is received that for some reason cannot be tied to an claimant and overpayment, it is recorded as a suspended repayment. These are viewable within the system, and will remain in the system until a worker manually applies the receivable to an overpayment, or issues a refund.

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We will work with AWI SMEs to identify business rules that will allow for automated release of refunds without the need for user approval. If an overpayment is adjusted or deleted systematically, the remaining repayment funds will be applied automatically. In addition, a UC staff can intervene to re-allocate a payment as needed. The system's ability to automatically adjust overpayment balances, Maximum Benefit Amounts (MBA) and record ledger transactions all play a role in streamlining and integrating collections processing into the payment of ongoing benefits.

myBIS can reverse a repayment. This is necessary if a payment is received and the allocation bounces for non-sufficient funds (NSF) or when the allocation is changed from one overpayment to another, or from one claimant to another. In these situations, ledger transactions are recorded, which allow UC staff to view and understand the details of the payment and reversal. At times, it may be required to provide a refund for a payment that was made.

myBIS can make a refund payment to a claimant or non-claimant, as well as to refund multiple payments at one time. Based on security, UC staff can request a refund that is then submitted to a supervisor for final approval. Overpayments that have reached a statute of limitations and are eligible for write off, are systematically identified.

A workflow item is generated for a user with the proper security rights to approve the write offs. This process is triggered quarterly, and the approved write off totals are then viewable on the quarterly draw statements. The same quarterly approval method is used for processing reversals and returning overpayments to an active state.

The built in business rules of the collections component of the application will help to keep the Agency compliant with collection statutes. The combination of these enhanced collections functionalities with the integrated payments, adjudication and appeals components will allow AWI to take full advantage of all repayment opportunities.

Investigations. We will work with AWI to create investigations functionality that will maximize staff efficiency in determining if a claimant and/or employer is in any way abusing the system. We will work with your investigators to create the functionality needed to compile their research and findings. This functionality will provide a gateway for workers to retrieve cross match information, and complete the investigation process. We recognize the value of the information contained within each investigation, and would restrict the access to this portion of the application based on security rights.

myBIS will be customized to allow for investigations to be triggered through various means, and will enable the investigators to record applicable investigation information into the system. If an issue for investigation is triggered by a match against other systems, that issue will be retained in the investigation and identified based on the type of cross match result. This will allow investigators to readily file an investigation, determine the impacts to the claim and further take necessary action, in some cases legal action.

Investigators will benefit from the integrated system, especially the Electronic Case Folder (ECF). This will present the Investigators with the history of correspondence for each interested party. Staff will experience a reduced workload when compiling information for investigations based on ease of availability of documents sent and received during the Claims Intake, Adjudication, Overpayment, Collections, and Appeals processes stored in the ECF.

Within investigations, the system can be tailored to track potential forgery cases, when a claimant is in non-receipt of their benefits check. The system will generate and store the affidavit of forgery, which can be indexed upon receipt from the claimant. The resulting determination of whether or not a benefit check is

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reissued will be recorded in the system. Correspondence can be created to notify interested parties based on the outcomes of the investigation.

Our previous UC experience includes the design, development and implementation of the Investigations functionality AWI wants. Integrating detection, investigation and collection functions within *myBIS* will bring consistency in tracking, reporting, and clarity of operations. With *myBIS*, management and staff can focus on fraud reduction rather than process management.

myBIS resolves common key business challenges:

- Increases flexibility and responsiveness for the future
- Maintains federal performance standards regardless of workload or restrictions
- Provides a familiar web-based look and feel for easier system use
- Supports integration with workforce activities that get customers back to work

FLAWI 131

5.1.2 Flexibility

Flexibility in day-to-day operations means UC staff will accomplish the tasks, activities and work effort needed to deliver customer service regardless of what that specific activity requires. AWI's UC Modernization requires an integrated system that allows staff to review new claims, monitor and update continuing claims, handle customer inquiries, make authorized changes to case records and dozens of other actions. All this done through a single, easy-to-use tool that increases productivity while reducing the time and knowledge needed to complete the tasks.

Accenture brings two key elements to this flexibility equation. First, we know from our work in other large states, that a UC system that has been "implemented" in numerous small states will not be capable of meeting the challenges of scale without significant modification and rework.

A solution delivered in a small state leaves AWI with the choice of taking the small-state capabilities (not very flexible) or facing the daunting chore of managing the contractor to stay on the delivery schedule while working through the issues and delays getting the small-state capabilities built out for Florida's needs.

Selecting Accenture eliminates this scale and modification concern. We bring the necessary design and development flexibility and experience from our work in Texas, California, Illinois and here in Florida. And we bring the people that have designed, built, tested, and implemented these flexible systems in those other states.

This leads to the second flexibility element that only our team brings to AWI. Troy Myers, Kathy McLeskey, Bob Bradner, Thomas Hawkins, Tim Murray and others on our team have established working relationships with AWI. These have been tested and proven through actual project delivery for the Agency. **Flexible relationships come from our team knowing and speaking shared, Florida-specific UC language. This means flexible and adaptable interactions will be the norm and not the exception.**

Others without AWI-specific work experience will constantly be falling back on their small-state projects as reference points and UC staff will have to spend valuable time over and over again explaining why that will not work in Florida—time they don't have if the mandated schedule is to be met.

Accenture's UC design, development and implementation experience in other large, diverse states prepares our team for the challenges of creating that flexible, yet rigorously capable system for AWI. Instead of using multiple systems, each with a separate log-on and password, as is done today, our flexible design moves users to a single sign-on capability that eliminates the time-wasting logging and screen-switching

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efforts and replaces it with appropriate access to all the information needed to do the job, based on the user's verified and approved user authorization.

Making it easier to get the required information is one step in creating a flexible user experience. The next step is helping the user know what to do with the provided information. Currently, users must in effect be UC policy experts in order to go through the steps needed to get a customer's case from start to finish. Additionally, they must know arcane codes and the most current "workarounds". This is a painful process, especially in the time period following mandated updates and program changes that occur on a regular basis.

myBIS provides users with the "smart" way to get through the benefits determination process by guiding the user, in a step-by-step process, following appropriate and AWI-approved rules, from start to finish. This allows new users as well as experienced UC staff the opportunity to work for the customer instead of having to "work the system" for the customer.

myBIS will be a collaborative solution between AWI and Accenture that can be customized to be faster, simpler, and less prone to error. Achieving this requires working closely together during design to identify the needed flexibility to ease day-to-day interaction with the system for the Agency and its customers.

One of the ways we have accomplished this for other UC clients is by distributing user experience surveys to key end users (customers, field users, supervisors, management and technical support) to gather input. These surveys provide a way to understand the "pain points" in the current systems and can offer insight available in on other way.

Because we have worked in the UC business for more than two decades, we understand the importance of designing, developing and implementing a user-friendly system that makes day-to-day activities simple, intuitive and fast to pick up. As a result, design sessions with key end users would include reviews of survey results and determination of the most flexible and beneficial navigation pattern for the system and its users.

Flexibility That Works. *myBIS* offers scalability, automated and configurable business processes, data validation during processing, and provides consistency in a user-friendly manner throughout the application. This is the flexibility needed to reduce today's inefficiencies. Processing claims faster means improved customer service.

As a proven, scalable, AWI-specific solution, *myBIS* will handle fluctuating work volumes and allow for future system enhancements and incorporation of business rules based on new regulation. In Illinois, our online solution has proved to be scalable. The same flexibility that allowed us to take the "normal" hundreds of thousands of claims before the economy twisted itself into knots, proved rock-solid handling the 1.5 million continuing claims that started in August of 2009.

The flexibility in the system allows customers to file a claim and have it processed automatically. If there are no exceptions, automatic processing allows UC staff to spend more time on value-add tasks and less time performing tedious data entry. Additionally, our past implementation has proven to be quick performance-wise; all of the pages take less than 2 seconds to load thus reducing valuable time spent waiting on slow system response time the Agency experiences today.

User-Friendly, Intuitive Interface. As AWI's current workforce changes over the next several years, the flexibility in myBIS will provide a proven way for new employees to be productive faster due to the user-friendly interface that is logically grouped by functional area and is intuitive to navigate. This reduces training costs going forward and allows greater staffing flexibility. For example, supervisors and managers will be able to shift and reassign work across available resources.

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The dashboard, illustrated in Figure 5-11, is an example of the type of information that could be available for management use. This example displays daily progress of assigned tasks, overall and per staff member. In addition, the Agency would see an overall increase in productivity as the *myBIS* solution is a web-based application that provides secure remote access; it would support a virtual workforce whenever necessary. UC staff can take calls from any location if a day out of the office is required.

Dashboards will be customized for each user, based on business rules, thus displaying only the functionality that is needed to complete assigned tasks. This flexibility will be achieved together as we are prepared to work in collaboration with the Agency to customize *myBIS* to best fit your day-to-day flexibility needs.

The search functionality with *myBIS* will be extensive and flexible and allow for advanced searches that return the best matches quickly. This information is easy to read and allows records sorting in ascending or descending order or filtering based on functional area. This makes locating a specific record a quick and easy process. UC staff are not digging through stacks of papers or searching on multiple systems to locate the information they need. Figure 5-12 provides an example of the type of search return that could be produced with *myBIS*.

The multiple applications used today are no longer adequate, and with the introduction of additional and changing federal regulations, workarounds have become more complex making it ever more difficult to learn the system. The system needs to be easier and faster for training new employees as this will bring new

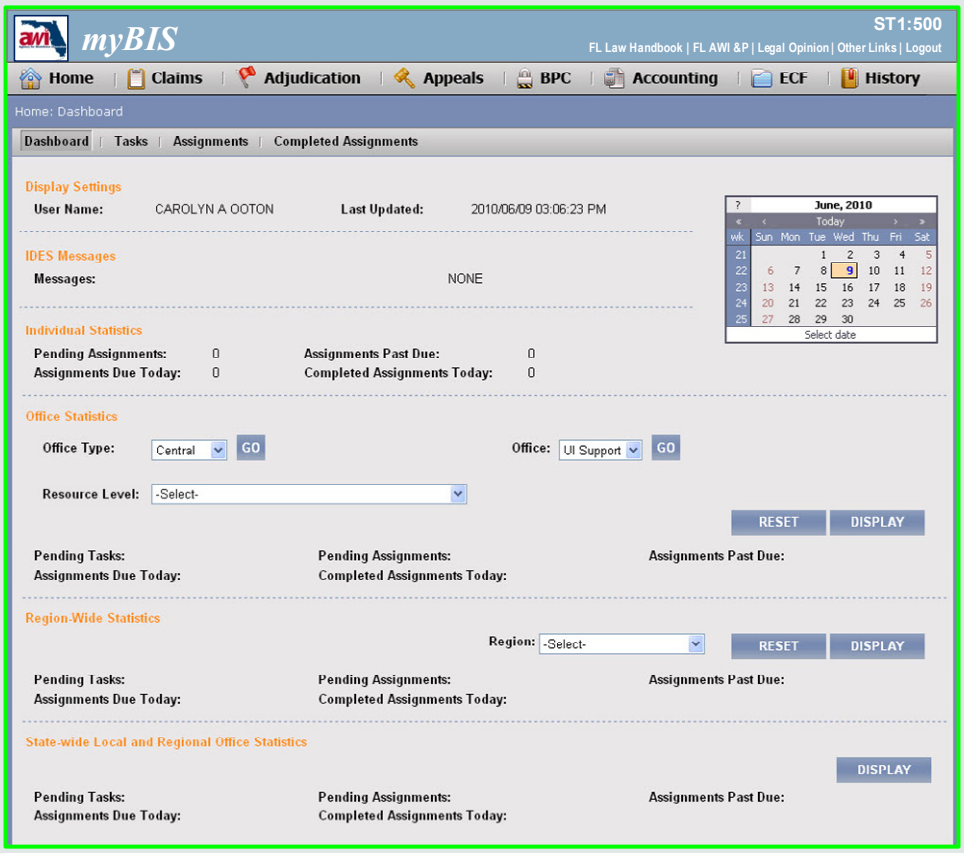

Figure 5-11. The dashboard screen provides a high level view of workload for the day

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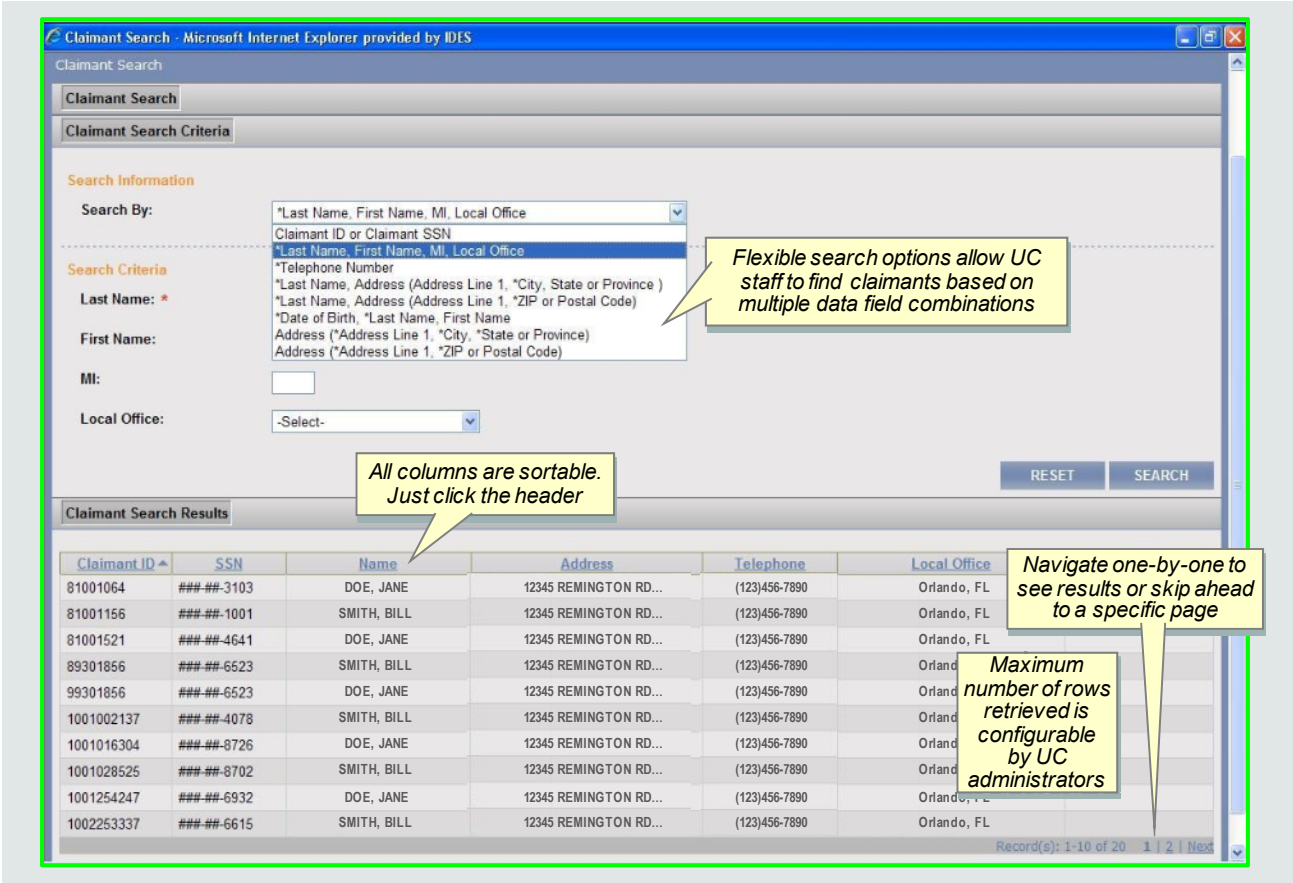

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Figure 5-12. Advanced search capability coupled with sortable results makes it easy to find the information you need

resources on-line faster to address increasing demands. The user-friendly interface equipped with a cascading menu provides a simple way to navigate throughout the system. Additionally, when a claimant or employer record is brought into context, the claimant remains in context as the user navigates through the system. The user does not need to perform another search to find the claimant or employer from one screen to the next, saving time and maintaining continuity.

Proven Automated Business Processes. The time intensive workarounds and manual paper processes cause delays and foster errors and missed steps. In addition to user-friendly screens, AWI needs automated business processes to reduce errors and eliminate timely workarounds. The solution will be designed to take into account mandated legislative changes and short time horizons for implementing new or modified programs.

Accenture will implement a fully automated application that supports AWI's business processes. However, at the Agency's request, manual overrides can be an option when unique situations and changes in policy require them. Normally, the system creates work items following established business rules but generic workflow items can be created on an ad-hoc basis allowing the UC staff to handle exception cases easily, as shown in Figure 5-13. The flexibility offered by myBIS will allow UC staff to spend more time on value-added activities, such as helping claimants find employment and resolving issues. UC staff productivity will increase because the relevant information is presented on easy-to-use pages logically grouped for the specific function in one system.

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This removes the need to be constantly switching between the multiple systems to complete a set of work items. Additionally, UC Management enhanced search and navigation capability further assist in the ease of day-to-day activities.

5.1.3 Customer Interaction

AWI has seen the volume of unemployment claims more than double in the last three years. The resulting increase in workload has strained the existing technical infrastructure, overloaded the patched together UC system and pushed the Agency's workers to the breaking point. Even with these challenges, Florida's UC claimants are still able to file their initial claims, complete continuing claims and, most importantly, they are still getting their benefits. This is due in no small part to the dedication and perseverance of AWI's UC personnel but this herculean effort is not sustainable for the future.

In the broadest sense, AWI's customers include internal users, claimants, employers and numerous State and Federal stakeholders ranging from the Governor's Office, to the Legislature to the U.S. Department of Labor. Each customer group interacts with the Florida UC system for different reasons. UC staff use the system to do their jobs and assist claimants. Claimants need to file for benefits and get answers to questions. Employers need to file their UCB-412s and be able to get information on benefit charges. External stakeholders want information that helps them understand how the economy is impacting Florida's employment picture, what the latest statistics are, and they need the reports required to help provide funding for the entire UC program.

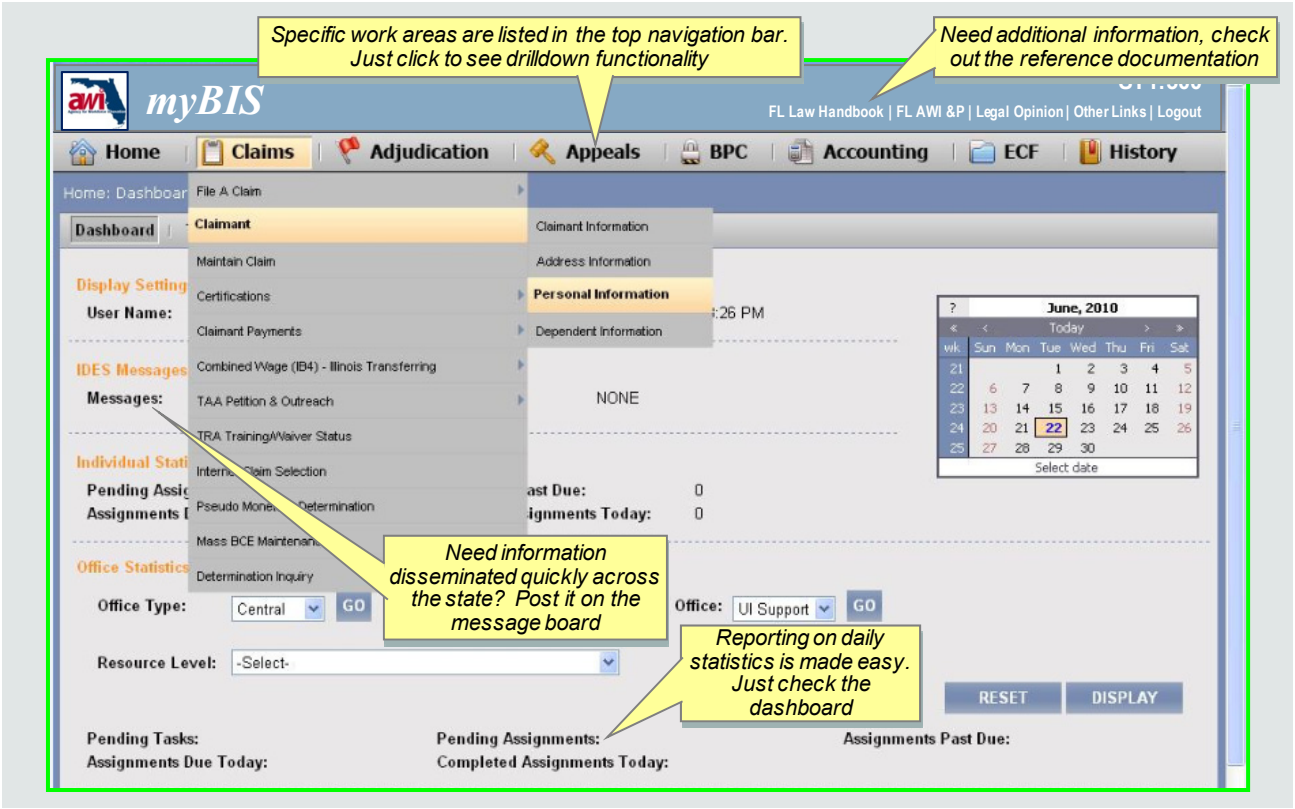

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Figure 5-13. The cascade menu at the top of all screens throughout myBIS allows intuitive navigation to different functional areas to perform work

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Proven, Scalable Delivery for Your Customers. AWI must have confidence that the contractor selected for this mission-critical effort has both the technical know-how and the proven experience to work collaboratively with Florida's UC experts to design, develop and implement the integrated UC system. Accenture is the only SI that has both the familiarity of having worked with AWI's UC team previously and that brings the most current technical skills proven through delivery in the largest, most diverse states such as Florida, Texas, California and Illinois. Web portals and IVRs delivered in states that number customers in six-figures is not the same as doing it for the largest, most complex states with customers in the millions.

AWI's confidence is rewarded by selecting Accenture for this "extreme makeover". Together with AWI's team, we have recently helped with the No Touch initiatives and the FLUID upgrade. This provides customer insight that helps our team reduce delivery risk, get started faster and brings back familiar faces who have established working relationships with your team. It also reduces confusion and increases communication because we have already gone through the learning process of how to talk to each other so that we understand what is being said – no small feat when a contractor you have not worked with comes through the door.

Importantly, Accenture has worked with many of your key external customers such as all of Florida's Workforce Boards. Given the key requirement to link filing for benefits with finding new employment, having a proven track record of successful delivery for the diversity of Workforce Boards across the State is an important consideration. Accenture has been in every single Workforce Board office and One-Stop location in the State and we are familiar with the essential need to provide the right services to these customers at the right time so that the Center can operate as smoothly and efficiently as possible.

Customized Interaction. AWI's customers have specific needs that the new UC system must meet. Accenture's approach for designing, developing and implementing a system that provides those customers with the interactions they want and need is to distribute user experience surveys to end users to gather input. During design session agency end users would be involved to review the results and determine the most flexible and beneficial navigation pattern for the system and its users. We confirm the needs are incorporated through extensive testing and User Acceptance Testing (UAT) sessions.

AWI will benefit greatly from an integrated, all encompassing automated system that will replace manual inefficiencies that were previously in place. In a collaborative effort between Accenture and AWI, we will work with you to customize *myBIS* to handle fluctuating volumes of claims, automate business processes and data validation, reengineer existing processes and provide self service functionality for customers. These features will be delivered through a single system solution to handle information obtained through Interactive Voice Response (IVR), business processes, and information obtained from the self service internet portal to provide an easy and convenient way for customers, claimants and employers alike, to access and maintain claim information.

Accenture brings industry and technical expertise and a proven framework to jump-start the customization process. With the assistance of AWI, *myBIS* would meet the Agency and customers' needs by implementing a multi-channel approach, depicted in Figure 5-14, which would allow customers to securely access and transfer information through different communication methods. For example, the system will allow a claimant to file via the internet, certify via the phone and send requested forms via regular mail to the office; all information received will be processed and stored in one system.

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Figure 5-14. No matter what channel the customer starts with they can complete and maintain information through other channels

Self Service Portal

myBIS offers a user-friendly, self service web-based portal where UC staff, new and existing claimants, employers and Third Party Agencies (TPA) have seven days a week 24 hour access (24X7) to claims data, appeals and/or documentation. Customers, including both claimants and employers, are no longer limited to access the system data and functionalities during the mainframe hours of operation.

The Self Service Portal provides customers with the ability to perform a number of self service tasks that may have previously required UC staff intervention, freeing up time to tend to more value-add activities. The Self Service Portal will enable claimants to create and maintain account information, file claims, view benefit payment information, and complete continued claim certifications. Employers and TPAs with the appropriate security can access frequently requested documents, browse FAQs, and view and enter appeals information for cases to which they are a party.

To file a claim via the internet a claimant would navigate to the Self Service Portal. In order to start enjoying the benefits of self service, new claimants will be required to register and create a login. Figure 5-15 displays the details the registration screen would require for a new claimant. After logging in the new claimant is prompted to enter address, employer information, and employment history.

Additionally, claimants will be required to answer questions about income and training; based on business rules, responses to these questions will prompt additional questionnaires to obtain as much information as possible from the claimant during

Fast Facts

- Self Service internet portal provides an additional channel for accessing claims and benefits information
- Improved data entry and validation improves worker productivity by reducing time spent on follow ups
- IVR services provide an option for customers to help themselves
- A multiple communication channel approach provides the right information at the right time

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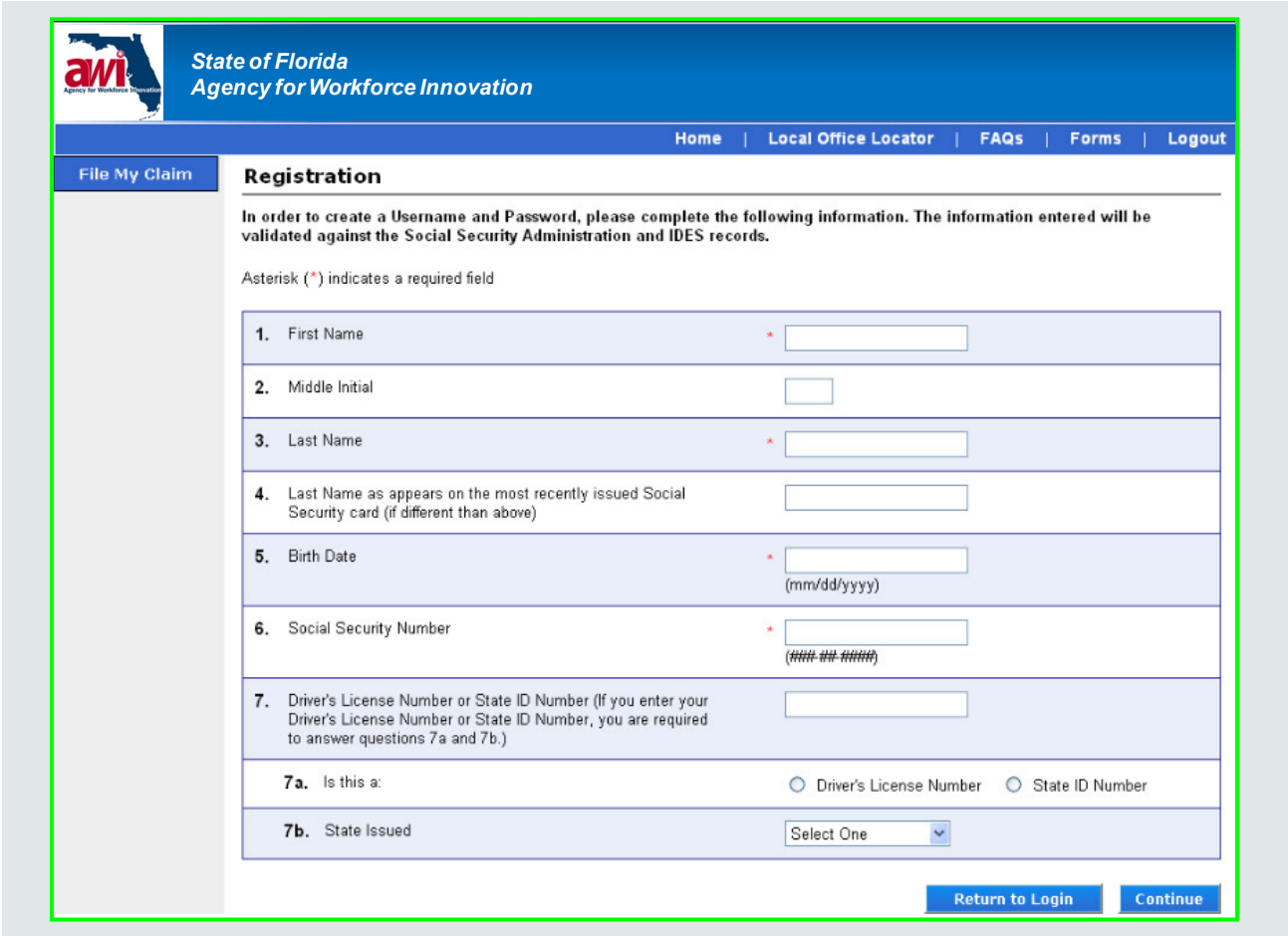

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Figure 5-15. The self service registration process and required fields and questions enforce submission of complete and correct information, which benefits AWI Staff and the customer as less follow up work expedites the processing of claims

initial filing. The claimant will then have the ability to review their responses and make edits as necessary before submitting.

Existing claimants will navigate to the Self Service Portal and log in with their secure username and password. The address information previously entered and saved in the system would be automatically populated. The remainder of the process will require new employment information to be entered.

Call Center

Customers would continue to enjoy the convenience of call centers via IVR. Call centers will handle initial claims, continuing claims and customer questions. When a customer calls in with claims or benefit related inquiries, the IVR will connect them to an agent based on routing business rules. An agent will respond and complete the customer's request. Information obtained via the telephone will be integrated with information received from other communication channels.

Through call routing, customers will be connected to an agent who will access customer information through the integrated desktop from any location, thus assisting and completing customer requests more quickly. Identifying customer requests and routing calls appropriately will expedite the process and reduce total call duration. Shorter telephone wait times and the quicker completion of requests boost customer satisfaction.

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In Person

Customers will still have the option to talk in-person with UC staff as customers will continue to be called for interviews for fact-finding purposes. With the convenience of a user-friendly Self Service Portal, customers would experience less wait time as the application is a convenient alternative to in-person claim filing.

With all information stored in one system, manual paper-processing being automated and the increased use of the Portal as the main means to file new and continuing claims, UC staff will be able to spend more time focused on value-add tasks. Customers will experience improved service as all customer information will be pulled up in one place and is easy for UC staff to navigate. Thus, interviews can be conducted in a more efficient manner, making the interview a less taxing and a more enjoyable experience for the customer and UC staff.

Mail

When additional information is needed, forms to be returned by the customer will be barcoded and, once returned to the Agency, scanned into the system where they can be easily viewed in the Electronic Case Folder (ECF). Barcodes are an easy and efficient way to track documentation and associate it with the appropriate claimant, claim or employer. Customers benefit from properly stored documentation as it expedites processing and the Agency benefits as customer information is now easily accessible through ECF; no more thumbing through stacks of paper.

Other Agency Interfaces

Interfacing with multiple outside agencies allows real-time verification of information. For example, during the claim filing process personal information is gathered, including alien verification information if the claimant indicates he or she is not a U.S. citizen. Alien information and details of the verification documentation will then be captured and verified through an interface with Immigration and Naturalization Service (INS).

In addition, personal information would be validated with the Florida Department of Corrections to determine if a claimant is incarcerated; UC staff would stop benefit payments and create the appropriate overpayments. With *myBIS*, when a claim is submitted the system can automatically register the claimant with Florida Workforce Services. This helps align the customer with new employment opportunities based on their skill set and preferences; it also reduces the duration of benefit payments on the claim. As the average benefit amount paid weekly is significantly less than the median weekly wage amounts for Floridians, the financial benefit for the claimant finding work as soon as possible is clear. Interfacing with other agencies contributes to accurate data entry, which would expedite processing, assist in getting claimants back to work more quickly, and verifying that only eligible claimants are receiving benefits.

In addition to the multiple communication channels through which customer information would be submitted, maintained and viewed, customers would “customize their experience” with the Agency. The *myBIS* solution allows customers to select preferences that best fit their individual needs. Options include the ability to specify a preferred payment option (debit card, direct deposit or warrant) for claimant benefit payments, a preferred language for adjudication and correspondence translation needs, a notification delivery option (email or mail), and elect for federal income taxes to be withheld from claimant benefit payments.

The multiple communications channels featured in *myBIS* provide for superior customer experience. Customers are no longer limited to Agency hours of operations to file a claim or maintain account information. Furthermore, they are no longer dependent on postal deliveries to find out status or information that still needs to be completed. The table in Figure 5-16 illustrates that 24X7 online access, an integrated and improved call center that relies on IVR for faster and more accurate call routing and improved data collection,

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Features	Benefits
Data validation helps with complete and accurate data entry	• Built-in error handling indicates where fatal errors have occurred and fields that are required to proceed • Accurate initial data entry can lead to faster claim processing where no UC staff intervention is required • Customer is able to review answers and revise before submitting, if necessary
24 X 7 accessibility to system	• Our solution allows claimants to certify outside of business hours • Frequently requested documentation is always available online; this will expedite information transfer as customers do not have to wait on regular mail • Customers can manage account information and view documentation at their convenience
Automatic registration with Workforce Services	• Assists claimants to find work more quickly, there is significant financial benefit of returning to work • Customers are matched with jobs based on personal preferences and skills

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Figure 5-16. Availability of self service functionality improves data entry accuracy, is convenient and enhances the overall customer experience

support the work of UC staff and facilitate a quicker turn around for claimants. These system benefits are reinforced by the automation of business processes and a single system approach that simplifies the data collection process, make interviews more efficient, and enable easy storing and access to documents. Our solution actively supports the Agency's goal to better serve their customers and improve assistance in getting them back to work.

5.1.4 Agency User Interaction

It is an accomplishment that the UC staff has been able to handle the ever-increasing workload in the recent years; with changing regulations and systems that require multiple and complex workarounds each task becomes more drawn out. Working in multiple systems makes collaboration and communication within the Agency difficult and is not sustainable for the future.

AWI must improve the current system, but as your staff works in a challenging industry and must ensure that claimants get their benefits in a timely manner, it is crucial that you choose a partner that can deliver. Accenture has the industry experience and technical skills and is prepared to work closely with AWI to design, develop and implement a system that will assist UC staff in filing claims, obtaining continuing claim information and getting the payments to claimants.

myBIS is a single, integrated and easy-to-use system that seamlessly connects UC staff, UC management, employers and stakeholders through secure access available anytime and anywhere. The system helps UC staff collaborate and communicate with each other through enhanced user experience, improved validation, workflow queues, an Electronic Case Folder (ECF), and automated scheduling for Appeals and Adjudication.

Enhanced User Experience

The users' interactions with the system and the experience with it are enhanced and facilitated thanks to intuitive navigation between screens and

Automation of business functionality and easier navigation of centralized information provide for improved user processing across business areas

- Improved navigation supports effective and efficient completion of users' tasks and activities
- Error and confirmation messaging enforces correct and complete data entry and processing requests
- All claims will be processed and will be viewable in a single system

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consistent layout of *myBIS* screens. User-learning is enhanced making the system more enjoyable to use. This results in accurate entry because the system is straightforward, effective and efficient. Agency users navigate via a cascade menu that provides navigation options at the business process level familiar to end users.

With *myBIS*, users are not forced to memorize codes, commands, or key functions. *myBIS* screens contain a clear and simple drilldown layout. *myBIS* consolidates data from multiple screens into one screen, avoiding excessive navigation for the user and creating operational efficiencies. For example, benefit payment summary information displays on the same page as detailed information about a specific benefit payment, reducing the need for UC staff to navigate between screens.

A single system solution allows information to be transferred efficiently, making it possible to collaborate and maintain claims data regardless of the location where the claim was filed or office where it is assigned. Electronic access to claims data reduces the risk of data being lost or inaccessible due to dependence on paper.

User groups across the Agency will have simultaneous access to the same data used to support decision-making. Agency users will be able to better serve their clients as the system provides an improved level of service through increased functionality, faster response times and automated rather than manual processes.

Improved Data Validation

Agency users will interact with *myBIS* more confidently because it is not only easier to use and understand but data validation is built into the system which reduces processing errors. The single, fully integrated system, built with sophisticated validation rules and error messaging, decreases data inaccuracies, redundancies and inconsistencies. Error messaging built into the application enforces correct and complete data entry. Confirmation messaging throughout the system allows the user to confirm key functions before data is submitted and processed. Data validation rules confirm that initial data entry is correct and vital information is not missing. Thus, the claim can be processed, the claimant paid quickly, and the processing remains transparent and accessible to all users.

Automated User Workflow Queue

The work item queues are the heart of *myBIS*. Tasks and assignments are a simple and effective way of communicating work that needs to be completed, escalated, or monitored; *myBIS* tasks will be built around AWI specific business processes and requirements. The workflow queue approach, as illustrated in Figure 5-17 effectively manages the identification and prioritization of work items that require UC staff intervention or follow-up actions. The approach uses business logic to determine whether a work item is created as a task to a general queue or as an assignment to a specific staff user. A task becomes an assignment once it is assigned to a UC staff member. UC staff manage the work item queues based on office location parameters or security access rights.

Tasks and assignments can be monitored from the Dashboard and from task and assignment screens, users can access detailed information. User collaboration is possible with this approach as multiple users in a process area are able to access the task screen work items, assign the first available task to themselves, see actions taken by other workers, or see active and historic worker interactions regardless of location.

myBIS offers a comprehensive workflow queues designed to make tasks more efficient and more consistent at both the worker level and the supervisor level. Key features of work item management include the following:

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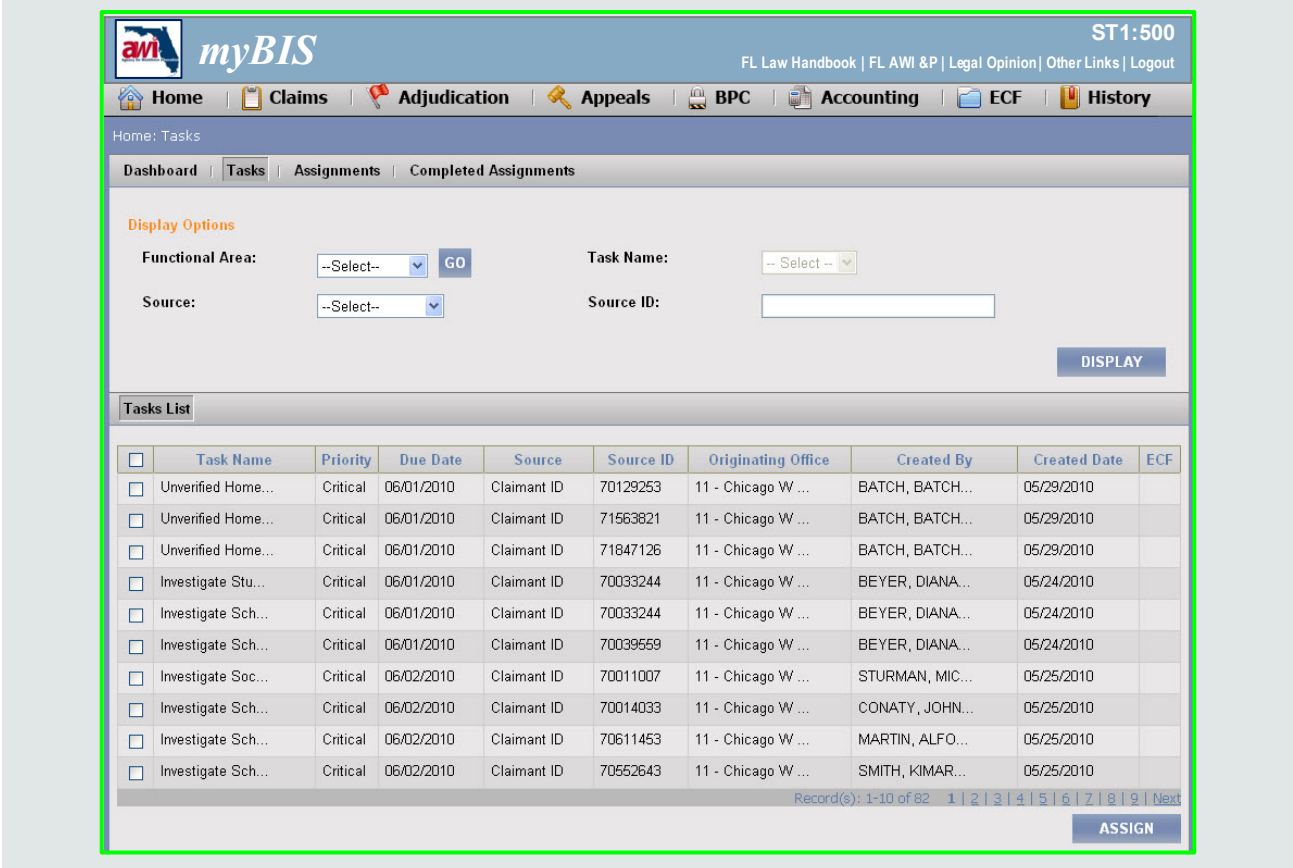

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Figure 5-17. Tasks displayed in a queue give users relevant information, ease of navigation and provide transparency

- **Task and Assignment views** - The task and assignment screens allow both UC staff and supervisors to view tasks and assignments for the queue they are assigned. Users can see a description of the work item, due dates, originating office, priority, and other key data (e.g. Claimant ID, Employer Account Number, Issue ID, Case Number, etc.). Supervisor level staff have the ability to reassign tasks and assignments. Business logic and security rights can be customized to allow work item throughput to be handled according to business and organizational structure.
- **Prioritization** - Tasks and assignments are set to an initial priority (low, medium, or high) based on business requirements and timing of task creation. *myBIS* includes a batch process that updates prioritization of tasks based on business rules. If a task or assignment is nearing the due date users are alerted as the priority is raised. Once a work item is overdue, the system sets the priority to critical to flag the user's attention. Assignment lists are sorted by priority and due date in order to better manage the queue, and monitoring the dashboard alerts the user of past due items.
- **Completed assignments reporting** - Communication through the Completed Assignments page offers a history of task throughput and completion rates for management staff's review. UC management can view task and assignment completion rates by office or at a more granular level by specific user. Managers and supervisors can effectively communicate and manage workloads, identify staff issues, and understand timeliness and compliance using the Dashboard, Task and Assignment functionalities. Completed assignments can be viewed for up to 15 days.

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- **Monitoring functions** - The system Dashboard features office-level statistics that allow management to chart overall task and assignment volumes as well as geographic workload trends. The information allows management to consider workload leveling and reassignments.

Electronic Case Folder and Correspondence

myBIS offers an Electronic Case Folder (ECF) that integrates case management and document management to share information, allowing for collaboration among users. Documents and correspondence can be maintained within a single repository. Any user with appropriate privileges can view case documents via the Electronic Case Folder regardless of their location, as shown in Figure 5-18, making communication of information immediate. Users can scan any document or form, regardless of source, and store it in the ECF.

Based on applicable security rights, Agency users can search for documents and correspondence 24X7 and reprint them as needed. Correspondence activity, such as date sent, recipient and date received is logged and available through this historical filing system's interface. *myBIS* provides the ability to search, re-index, re-categorize, and annotate existing documents based on security rights. For example, Agency users with the right security access can re-index an employer protest to a different issue and section of law if it was attached to the wrong issue. UC staff can also preview correspondence before they are generated including the Determination Notices in Adjudications and Decision Notices in Appeals.

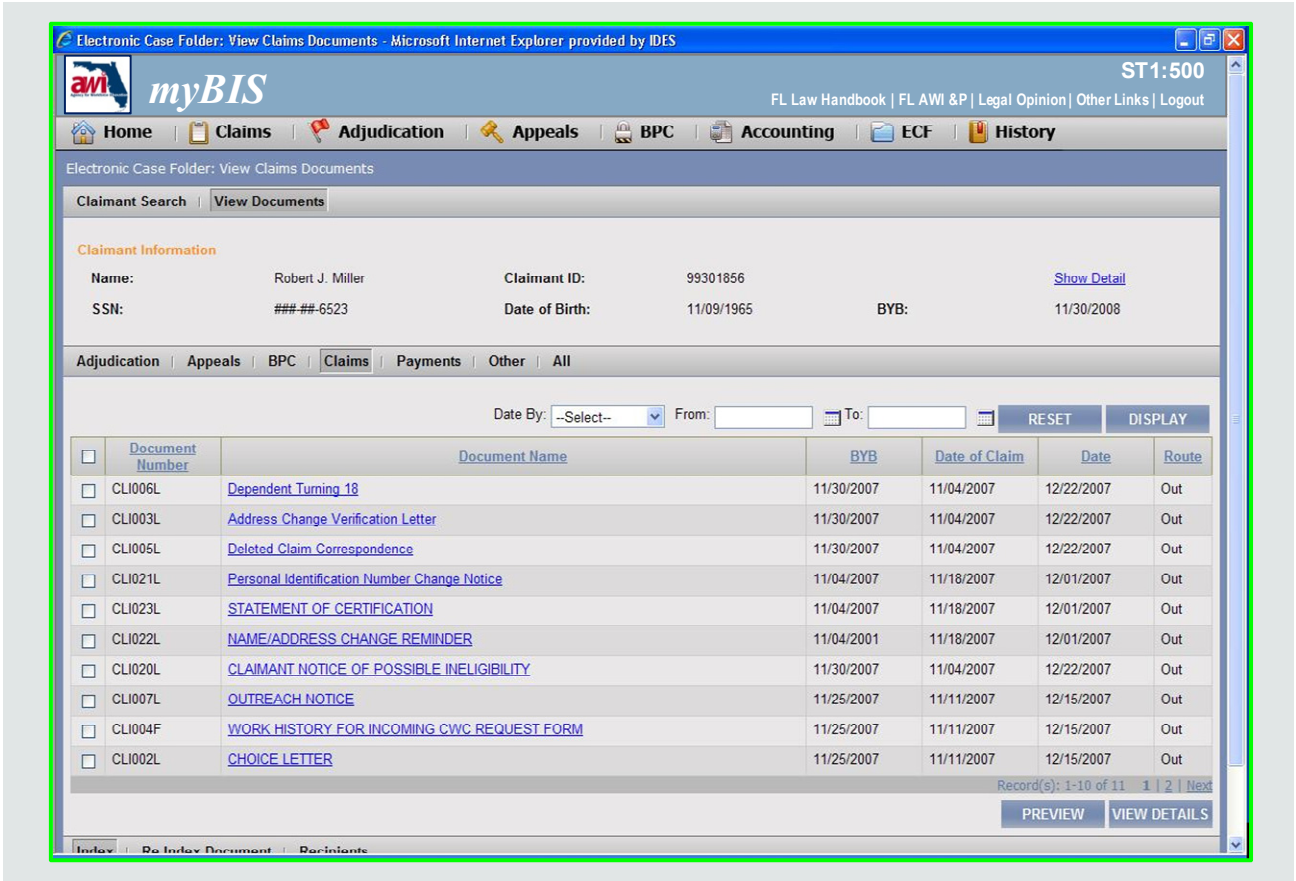

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Figure 5-18. Correspondence is easy to access for anyone! Just go to the Electronic Case Folder to look for a specific document and open it in PDF format

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myBIS automates correspondence requests based on business process integration. For example, when a new claim is filed, requests to send associated correspondence are triggered automatically. Individualized barcodes are generated and displayed on standard outbound forms to allow for easy recognition upon return. Once returned, the document is automatically associated and indexed based on the information contained in the intelligent barcode such as the associated business area, claimant, employer, issue, etc. The recognition of the barcode allows for quick indexing, work item creation based on business rules, and quick retrieval of the document. This approach helps reduce postal costs, reduce document storage space, and improve overall staff efficiency and turnaround time.

Appeals and Adjudication Automated Scheduling

myBIS supports Agency users' communication by enabling flexible docketing and scheduling. The solution provides an easy and effective way for users to communicate and promptly resolve scheduling conflicts of appeals, adjudications, or referees' availability. When the issue is logged, *myBIS* automatically schedules most Adjudications in real time.

The system schedules hearings and adjudications based on criteria defined by the Adjudication and Appeals Divisions, including claimant's assigned local office, availability, issue type, language skills, employer stacking, referee training or special expertise. *myBIS* allows rescheduling as well as continuances of appeals cases and if there is already a scheduled issue for the same claimant, the scheduler tries to add the new issue to the same adjudicator so they can group the interviews and complete them on the same day.

The case management functions and electronic files mitigate the negative effects of canceling and rescheduling appeals due to unexpected referee absences. The solution moves an appeal from the docket of an absent referee to another referee or referee supervisor with an available time slot on-line in real time. Users do not need to figure out availability. A manual override feature is also available allowing UC staff with the appropriate security level to reassign the hearing to another available referee.

5.1.5 Fulfillment of the UC Program Goals and Objectives

Figure 5-19 shows the benefits that *myBIS* brings to helping the UC program be all that it can be.

UC Program Goal	myBIS Solution	Benefits
Focus on re-employment	• Automated workforce registration	• Integrating the claimant's workforce registration as part of the claim filing process jump-starts the claimant's road to re-employment.
Increased automation	• Limited paper-based processes and reduced manual intervention • System generation of workflow queue items • IVR functionality in call center • Incorporation of business logic layer • Document archiving and management system	• Automated processing and validations increase turn-around time of claims and frees UC staff for other mission critical tasks. • Tasks and assignments provide the ability to distribute workload evenly across available resources. It also allows for an easy monitoring and notification process. • Redesigned IVR system facilitates a more equitable workload distribution method by changing the routing strategy. It also provides more self-sufficiency for the customer. • State-of the-art rules engine facilitates changes to the application, streamlines processing, and provides accurate calculation of benefits • Electronic Case folder functionality eliminates the need to keep paper case files, facilitates communication of cased documents, provides a single

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UC Program Goal	myBIS Solution	Benefits
		repository for case documents, and allows for instant re-printing
Self Service access	• 24X7 access for claimants and employers • Ability to receive information electronically • Enhanced IVR functionality	• Anytime internet access increases customer self sufficiency • Claimant access to a web portal expedites the claim filing process and serves as a source of common information and documents • IVR allows claimants to file a claim and certify over the phone representing another access channel
Improved fraud detection	• Integration of business areas • Built in verification and validation of claim information • Automated interfaces to other agencies	• An integrated system allows for reduced redundancy and inconsistency of data • *myBIS* integrates claims with payments and BPC function which validates claim data to stave off incorrect issuances from the source • Enhanced cross matching interfaces allow for improved fraud detection. Sharing data across agencies validates and confirms claim data and assists in the reduction of fraud.
Compliance with State and Federal regulations	• Robust yet flexible rules engine • Coding practices that facilitate system updates • Report customization	• Rules engine facilitates evolving business requirements as it provides flexibility to integrate mandated changes. • Standardized development and build methodologies provide consistency and repeatability. It supports future changes and enhancements. • Increased report functionality allows the Agency to easily gain access to information when needed to report Agency activity or to monitor progress.
Flexibility and integration	• Integration of business processes creates a “one-stop shop” for all UC information • Claimant multi-channel access to claim information (IVR, Self Service Portal) • Scalable application	• *myBIS* supports end-to-end claims processing from claims to adjudication to payments which tracking history and accounting throughout. Also, a centralized system supports modifications as required by legislative and Agency goals. It also eliminates the need for duplicate data entry. In addition, a single repository of data allows UC staff to process claims quicker and focus on other mission critical activities • Alternative access to claim data encourages more accountability on the management of claim data. • Scalability supports process improvements due to changing Agency needs and policies as well as legislative statutes changes

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Figure 5-19. myBIS directly addresses and responds to the Agency’s program goals, thus realizing the overall vision of the UC Modernization effort

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