

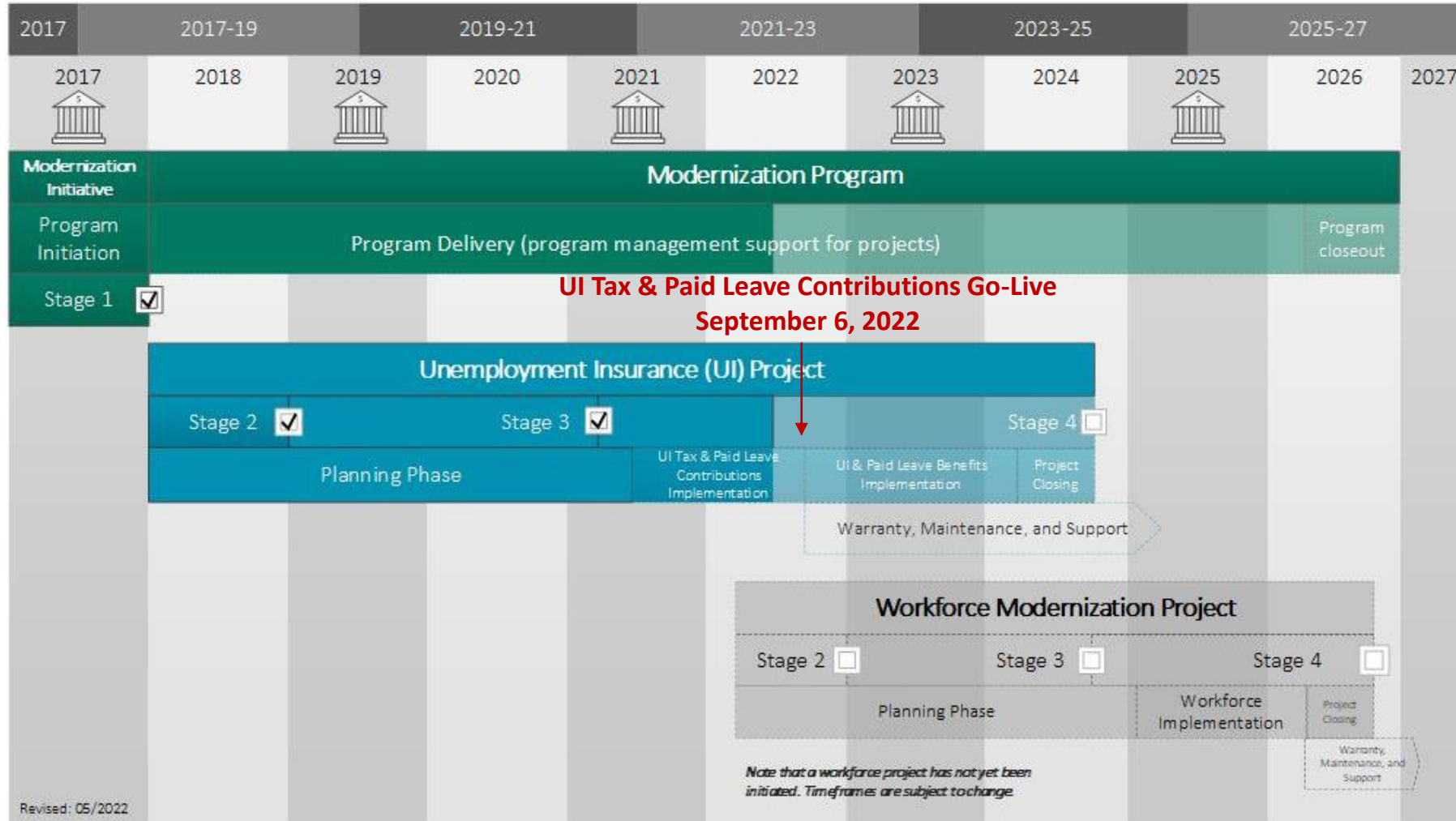
Modernization Program Update

Joint Legislative Committee on Information Management and Technology

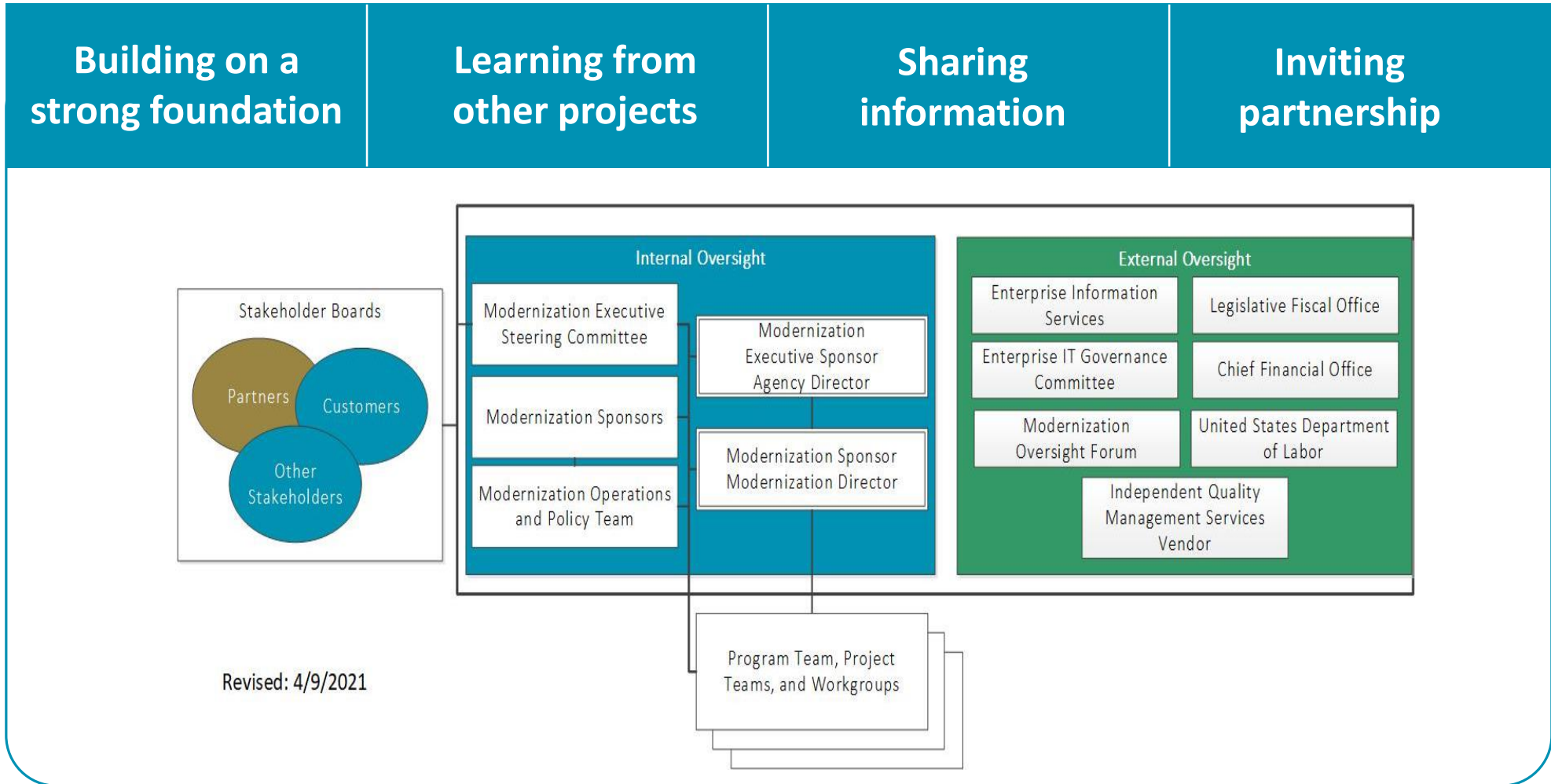
DAVID GERSTENFELD, ACTING AGENCY DIRECTOR
RENEE ROYSTON, MODERNIZATION DIRECTOR
BILL TRUEX, CHIEF INFORMATION OFFICER

June 3, 2022

Modernization Program Timeline



Governance and Oversight



Scope

UI Modernization Project

- Unemployment Insurance Tax
Paid Leave Oregon Contributions
- Unemployment Insurance Benefits
Paid Leave Oregon Benefits



FRANCES ONLINE

Schedule

UI Modernization Project

Rollout 1

UI Tax and
Paid Leave

Contributions

July 2021- Sept 2022

Go-live Sept 6, 2022

Rollout 2

Paid Leave
Benefits

Sept 2022 – Sept 2023

UI Benefits

Sept 2022 – March 2024

Budget

UI Modernization Project

Project Baseline Budget* **\$106,121,029**

Total Expended to Date** **\$20.9 million**

Source of Funds

UI Modernization Fund..... \$81,697,283

Other funds..... UI and Paid Leave

General fund loan..... Paid Leave

*+10% - \$116,733,132

-10% - \$95,508,926

As of April 2021

**As of March 2022

Independent Quality Assurance Rating

Overall UI Modernization Project Health

**Current
Status**



Current Trend

- Project has no open issues
- Actively managing identified risks
 - Schedule
 - Organizational Readiness
 - IT Resources

Risks are assessed on a monthly basis. Risk mitigation strategies are in place.

For quarter ending March 2022



Current Focus

Schedule Management

Schedule
Management
Tools

Procurement
Resources



Current Focus

Organizational Readiness

Testing

Training

Work in
Progress



Current Focus

IT/Technical Readiness

People

Legacy &
Existing
Systems

Data



An Overview of Cutover

- Preparations for the rollout cutover are captured in a series of cutover checklists.
- Cutover checklists provide a list of interrelated steps and activities that must be coordinated to ensure a smooth and successful rollout, such as :

Which business activities need to stop:

- When to hold certain work.
- When to send particular communications.

Which batch jobs to run or cancel:

- When the last run of cancelled jobs will occur
- When the first run of Frances jobs will occur

Which systems to shut down:

- When shutdown should take place

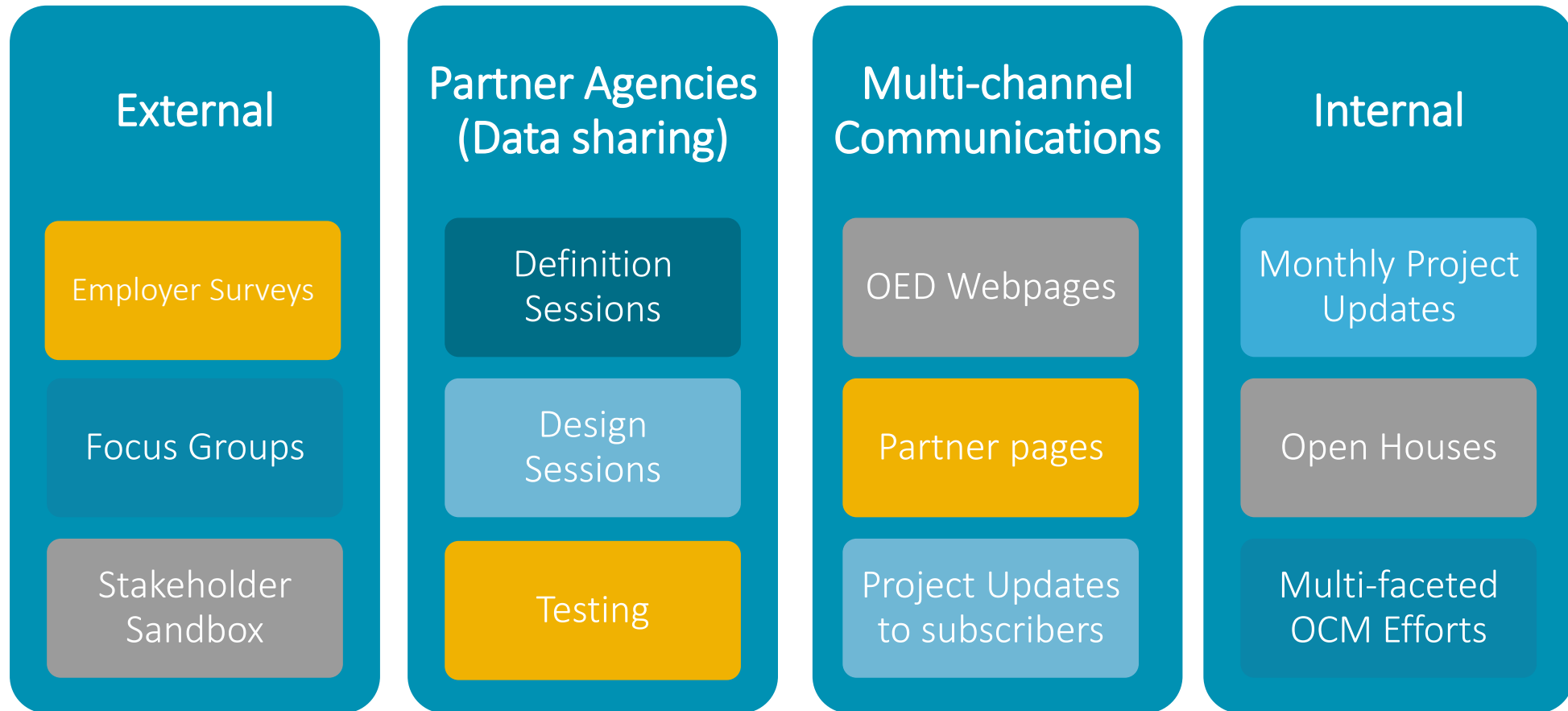
Which external interfaces to redirect:

- When the OPRS → MF interface will be turned off
- When the Frances → MF interface will be active



Current Focus

Stakeholder Engagement and Communication



Online Self-Service Today

Current system capabilities: Individual systems

OPRS:

- File a New Report
- Amend a Report
- View Outstanding Reports
- View Past Reports
- Offer link to our partners to Pay amount due for Combined Reporting (Revenue Online)
- Access to Zen Desk Support Portal for Self Led Educational Assistance

Employer Account Access (EAA):

- Employer can access their account to view and pay past due balances
- Need a PIN (If the user gets locked out or forgets their PIN has to call the agency for reset)

File and Appeal Online:

- Currently employers can file an appeal online
- Available on Oregon.gov page under hearings process information page.



 **FRANCES ONLINE Self-Service**

Expanded functionality: All in one application

Combined Reporting

- Beginning 2023, filing State Wide Transit Tax (STT) and Paid Leave contributions on the combined report

Manage Account Information

- Action center to alerting customer of action
- Update account information in real-time
- Identity verification
- Add and manage users and update users' demographics
- Manage mail and correspondence preferences
- Manage associated Authorized Reps and TPAs
- Review rates

Electronic Submissions

- Submit documentation
- Submit Corporate officer exclusion
- Submit to elect into coverage
- Submit a Tax Authorization and Power of Attorney

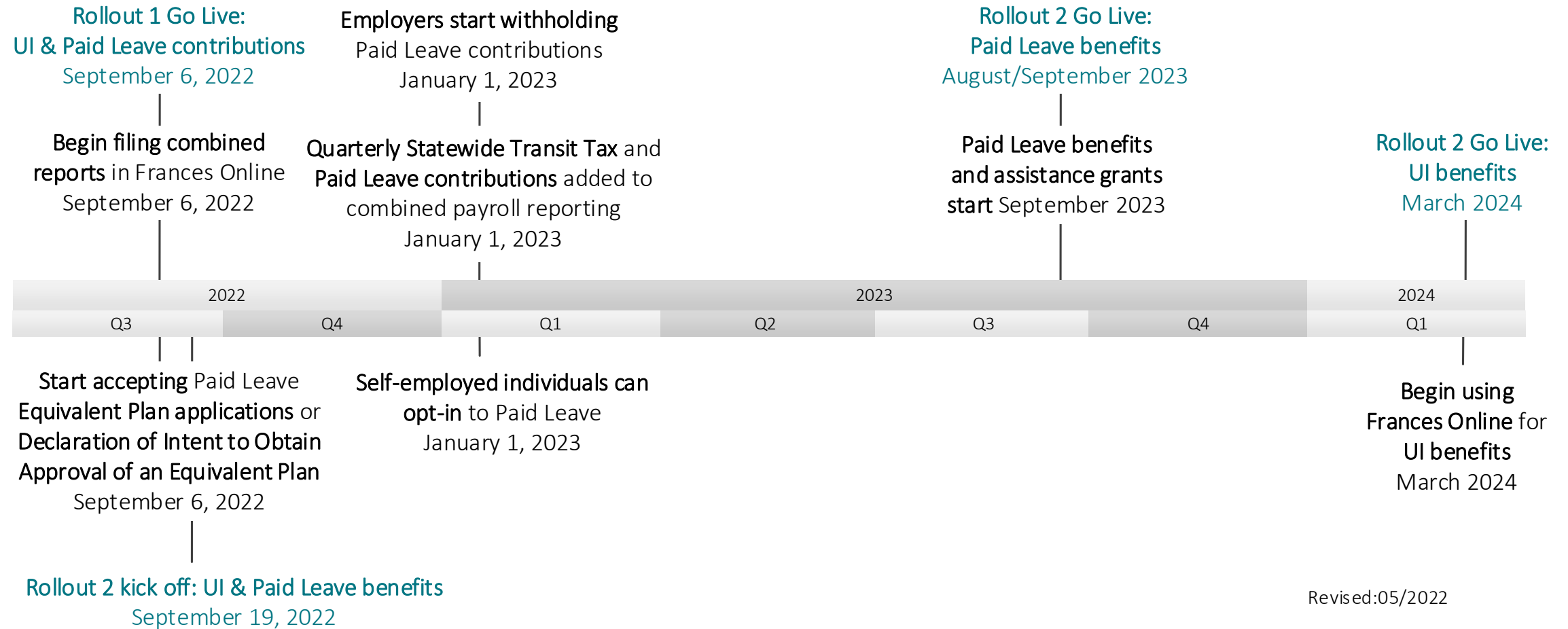
Customer Service

- Secure messaging
- Interactive assistant

Submit Requests

- Submit a business change in status request
- Request or withdraw an appeal
- TPA registration and bulk filing
- Refund request
- Refund replacement request
- Request a Payment Plan online
- Request FUTA Certs
- Ask for Redetermination
- View and print letters
- Audit referral
- Apply for and manage an Equivalent Plan
- Register for self-employed contributions

Frances Online Timeline



Revised:05/2022



Thank You

