



**STATE OF CALIFORNIA - GOVERNOR EDMOND G. BROWN JR.  
LABOR AND WORKFORCE DEVELOPMENT AGENCY**  
**CALIFORNIA UNEMPLOYMENT INSURANCE APPEALS BOARD  
EXECUTIVE DIRECTOR/CHIEF ADMINISTRATIVE LAW JUDGE**

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May 4, 2012

To: Board Members

**May 2012 Summary Report of Executive Director and  
Chief Administrative Law Judge Alberto Roldan**

**1. Office of the Chief**

- Interviews for filling the PALJ position in the Orange County Office of Appeals are scheduled for May 22.
- The PALJ quarterly meeting is scheduled for May 23<sup>rd</sup> and 24<sup>th</sup>. The Regional Administrators will be reporting on their findings for the best practices and standardization effort we will be making in the coming months.
- I visited with the San Diego Office of Appeals on April 19<sup>th</sup> and 20<sup>th</sup>. During the second day, I had the opportunity to do a calendar in that office and experience the workflow differences as compared to Sacramento where I normally get my case assignments.
- A group of typists from the Field Operations decision typing hub have been identified for training to support Appellate Operations in preparing appeal transcripts. They will be trained and available for transcript typing in time for when the transcript typing contract runs out at the end of June.

**2. Snapshot of Field Operations performance through April 2012**

**Overall April 2012 Workload and Performance:** After the big push in March, CUIAB saw a small increase in inventory in April. This was expected. Having issued nearly all possible Unemployment Insurance (UI) decisions in March, there was very little carry over. This explains why in April we closed the fewest number of cases [30,554] in more than three years. In addition, there was a shift in effort towards disability, tax and ruling cases in response to a desire to return to a balanced focus on workload after concentrating on UI in the previous month. With intake [35,539 cases] only slightly below average levels, the open caseload [44,228] increased by almost 5000 cases. This was the first month since October 2011 in which the inventory grew. The month end inventory of cases was still 18% smaller than the average for the fiscal year and smaller than was true at the end of February 2012.

**Case Aging and Time Lapse:** After meeting our goal of satisfying the United States Department of Labor (DOL) average case standard in March, we focused our attention on also meeting the 45-day time lapse standard that requires CUIAB to close 80% of its UI cases within 45 days of the appeal. The application of strategies identified during the last executive planning session combined with the overall improvement in outstanding inventory helped us to meet that challenge more quickly than anticipated. For the month, approximately 80% of the UI decisions issued were within 45 days of the appeal. This was the first month since August 2001 in which we achieved compliance with this required measure. In addition, the average case age of 26 days for April also remained well within the requirements set by DOL. We also were able to make substantial progress on the 30-day standard, with 35% of the decisions issued within that time frame. This was the highest month end result since April 2003. 90-day time lapse [99%] met Federal guidelines for the 9<sup>th</sup> time this fiscal year.

**Cycle Time:** The UI cycle time in April was 39 days from date of appeal to issuance of the decision. This was an improvement of six days from March and 21 days from January. In February and March, the vast majority of the improvement was from the date of verification to the date of scheduling the hearing. In April, however, the decrease was more or less across the board with reductions in the time taken to verify appeals, to set hearings and to issue decisions. This improvement reflects the concerted effort by support staff and ALJs at every level to specifically improve time lapse performance rather than just reducing inventory which had been the previous focus.

**Unemployment Insurance (UI) for April:** New UI cases [33,500 cases; 19,180 appellants] were 2% below the average for this fiscal year. The number of closed cases [28,383 cases; 16,207 appellants] was 21% below the norm and represented the fewest decisions since February 2009. As a result, the month-end open inventory [34,674 cases; 19,799 appellants] jumped by more than 5,000 cases. As noted earlier, we still remain 22% below the fiscal year average and have reduced the inventory from the balance of 49,805 UI cases that existed at the end of July 2011.

**Disability Insurance (DI) for April:** In this category we reduced the inventory of open cases. The number of new cases [1,256] was 10% below the fiscal year average and the fewest since November 2011. The number of closed cases [1,424] was above the norm for the 3<sup>rd</sup> straight month. (The offices set more DI cases given the relative scarcity of UI appeals prepared for calendaring.) The open inventory [1,734] is the lowest month-end total in at least ten years.

**Tax, Rulings, Other for April:** The Southern California Regional Support Unit focused on verifying ruling cases during April. As a result, the number of new cases [555] was 36% above the fiscal year norm. With a big drop in decisions [238 closed cases], the open inventory [3,788] increased to a six month high.

In Tax, there was a relatively low intake of only 117 new petitions. The output of the unit in terms of closing cases was 63% greater than normal which is outstanding. The issuing of 492 decisions during April was the largest one-month total in agency history. As a result, the open inventory [3,995] is below 4,000 for the first time since June 2009.

**NEW OPENED CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	32,164	29,014	31,429	31,869	32,267	34,435	32,319	31,827	33,713	35,619	27,150	37,388	389,194	<b>32,433</b>		
2010	37,307	34,125	38,172	42,249	37,447	36,321	39,238	40,219	31,780	35,604	30,181	35,509	438,152	<b>36,513</b>	113%	4,080
2011	38,676	34,399	39,494	35,519	36,159	35,785	32,527	38,079	39,828	36,161	30,799	31,448	428,874	<b>35,740</b>	98%	-773
2012	33,339	30,233	36,391	33,590									133,553	<b>33,388</b>	93%	-2,351
13 180 30 UI registrations Apr to date are down 10% from 2011, down 12% from 2010, and up 7% from 2009 UI registration monthly average is down 7% from 2011, down 9% from 2010, and up 3% from 2009													2011	93%	90%	
													2010	91%	88%	
													2009	103%	107%	
													chg to '12 avg	chg to '12 YTD		

**CLOSED CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	25,728	24,752	28,392	30,565	30,101	32,703	34,500	30,455	32,165	39,878	34,525	36,623	380,387	<b>31,699</b>		
2010	32,738	37,951	44,067	39,481	35,731	36,680	35,798	39,000	38,748	37,386	34,848	36,237	448,665	<b>37,389</b>	118%	5,690
2011	34,029	37,998	50,124	35,054	32,103	38,117	33,797	36,979	41,802	33,663	33,076	34,301	441,043	<b>36,754</b>	98%	-635
2012	33,604	37,167	44,615	28,383									143,769	<b>35,942</b>	98%	-811
13 419 24 UI dispositions Apr to date are down 9% from 2011, down 7% from 2010, and up 31% from 2009 UI disposition monthly average is down 2% from 2011, down 4% from 2010, and up 13% from 2009													2011	98%	91%	
													2010	96%	93%	
													2009	113%	131%	
													chg to '12 avg	chg to '12 YTD		

**BALANCE OPEN CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Avg.	% Chg of Avg	Yr-Yr AvgChg	
2009	69,049	73,237	76,311	77,968	80,188	81,750	79,774	81,302	82,785	78,473	71,095	71,813	<b>76,979</b>			
2010	76,301	72,323	66,136	68,715	70,234	69,664	72,557	73,410	66,243	64,624	59,811	59,075	<b>68,258</b>	89%	-8,721	
2011	63,632	59,909	49,088	49,435	53,389	50,926	49,805	50,755	48,650	51,057	48,653	45,715	<b>51,751</b>	76%	-16,507	
2012	45,315	38,225	29,603	34,674									<b>36,954</b>	71%	-14,797	
13 266 276 UI balance of open cases Apr to date is down 33% from 2011, down 48% from 2010, and down 50% from 2009 UI balance monthly average down 29% from 2011, down 46% from 2010, and down 52% from 2009													2011	71%	67%	
													2010	54%	52%	
													2009	48%	50%	
													chg to '12 avg	chg to '12 YTD		

**DI TRENDS - FO**  
Program Codes 7, 10, 11, 12, 16 & 20

**NEW OPENED CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	1,610	1,107	1,794	1,519	1,628	1,748	1,537	1,321	1,571	1,414	1,245	1,330	17,824	<b>1,485</b>		
2010	1,446	1,437	1,775	1,957	1,371	1,232	1,763	1,609	1,366	1,372	1,159	1,414	17,901	<b>1,492</b>	100%	6
2011	1,537	1,651	1,411	1,691	1,360	1,428	1,405	1,575	1,489	1,392	1,094	1,268	17,301	<b>1,442</b>	97%	-50
2012	1,395	1,490	1,611	1,256									5,752	<b>1,438</b>	100%	-4

DI registrations Apr to date are down 9% from 2011, down 13% from 2010, and down 5% from 2009  
DI registration monthly average is even with 2011, down 4% from 2010, and down 3% from 2009

**CLOSED CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	1,217	1,269	1,451	1,465	1,129	1,463	1,823	1,644	1,648	1,753	1,527	1,701	18,090	<b>1,508</b>		
2010	1,283	1,557	1,967	1,852	1,276	1,581	1,494	1,511	1,581	1,552	1,372	1,565	18,591	<b>1,549</b>	103%	42
2011	1,295	1,576	1,925	1,512	1,441	1,567	1,365	1,462	1,426	1,579	1,266	1,270	17,684	<b>1,474</b>	95%	-76
2012	1,334	1,547	1,456	1,424									5,761	<b>1,440</b>	98%	-33

DI dispositions Apr to date are down 9% from 2011, down 13% from 2010, and up 7% from 2009  
DI disposition monthly average is down 2% from 2011, down 7% from 2010, and down 4% from 2009

**BALANCE OPEN CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	3,426	3,264	3,613	3,684	4,197	4,478	4,204	3,895	3,819	3,476	3,203	2,836		<b>3,675</b>		
2010	2,997	2,876	2,682	2,789	2,891	2,541	2,808	2,908	2,691	2,513	2,299	2,148		<b>2,679</b>	73%	-966
2011	2,390	2,465	1,951	2,126	2,046	1,905	1,943	2,054	2,117	1,930	1,757	1,755		<b>2,037</b>	76%	-642
2012	1,815	1,757	1,905	1,734										<b>1,803</b>	89%	-234

DI open balance Apr to date is down 19% from 2011, down 36% from 2010, and down 48% from 2009  
DI open balance monthly average down 11% from 2011, down 33% from 2010, and down 51% from 2009

2011	89%	81%
2010	67%	64%
2009	49%	52%
chg to '12 avg		chg to '12 YTD

**TAX TRENDS - FO**  
Program Codes 15, 17, 18, 32, 45, 46, 47, 48

**NEW OPENED CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	166	93	219	174	258	164	252	256	169	292	224	229	2,496	<b>208</b>		
2010	142	139	164	233	140	163	94	137	146	181	188	232	1,959	<b>163</b>	78%	-45
2011	134	168	144	261	140	180	112	266	364	147	248	402	2,566	<b>214</b>	131%	51
2012	346	141	196	117									800	<b>200</b>	94%	-14
													2011	94%	113%	
													2010	123%	118%	
													2009	96%	123%	
														chg to '12 avg	chg to '12 YTD	

Tax registrations Apr to date are up 13% from 2011, up 18% from 2010, and up 23% from 2009  
Tax registration monthly average is down 6% from 2011, up 23% from 2010, and down 4% from 2009

**CLOSED CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	92	97	172	149	72	97	126	111	162	70	149	288	1,585	<b>132</b>		
2010	48	109	107	91	117	124	135	101	174	130	99	235	1,470	<b>123</b>	93%	-10
2011	139	173	193	252	176	277	168	278	325	293	323	247	2,844	<b>237</b>	193%	115
2012	227	352	322	492									1,393	<b>348</b>	147%	111
													2011	147%	184%	
													2010	284%	392%	
													2009	264%	273%	
														chg to '12 avg	chg to '12 YTD	

Tax dispositions Apr to date are up 84% from 2011, up 292% from 2010, and up 173% from 2009  
Tax disposition monthly average is up 47% from 2011, up 184% from 2010, and up 164% from 2009

**BALANCE OPEN CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	3,585	3,580	3,627	3,649	3,836	3,903	4,029	4,174	4,180	4,402	4,477	4,416		<b>3,988</b>		
2010	4,509	4,539	4,596	4,738	4,759	4,796	4,754	4,790	4,758	4,801	4,890	4,885		<b>4,735</b>	119%	746
2011	4,880	4,874	4,824	4,833	4,797	4,700	4,643	4,630	4,666	4,520	4,445	4,593		<b>4,700</b>	99%	-34
2012	4,711	4,498	4,371	3,995										<b>4,394</b>	93%	-307
														2011	93%	91%
														2010	93%	96%
														2009	110%	122%
															chg to '12 avg	chg to '12 YTD

Tax balance of open cases Apr to date is down 9% from 2011, down 4% from 2010, and up 22% from 2009  
Tax balance monthly average is down 7% from 2011, down 7% from 2010, and up 10% from 2009

**RULING - OTHER TRENDS - FO**  
 Program Codes 9, 13, 14, 19, 21, 22, 40, 44

**NEW OPENED CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	175	92	203	456	567	340	304	206	170	710	923	275	4,421	368		
2010	486	609	709	598	441	424	468	1,359	201	239	229	214	5,977	498	135%	130
2011	64	97	92	739	526	510	426	454	207	982	247	251	4,595	383	77%	-115
2012	182	245	746	576									1,749	437	114%	54
Ruling/Other registrations Apr to date are up 76% from 2011, down 27% from 2010, and up 89% from 2009													2011	114%	176%	
Ruling/Other registration monthly average is up 14% from 2011, down 12% from 2010, and up 19% from 2009													2010	88%	73%	
													2009	119%	189%	
													chg to '12 avg		chg to '12 YTD	

**CLOSED CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	236	333	238	209	179	208	273	264	315	192	260	357	3,064	255		
2010	335	392	500	682	465	716	421	631	484	804	303	415	6,148	512	201%	257
2011	442	399	728	390	424	631	384	397	530	593	389	351	5,658	472	92%	-41
2012	500	455	299	255									1,509	377	80%	-94
Ruling/Other dispositions Apr to date are down 23% from 2011, down 21% from 2010, and up 49% from 2009													2011	80%	77%	
Ruling/Other disposition monthly average is down 20% from 2011, down 26% from 2010, and up 48% from 2009													2010	74%	79%	
													2009	148%	149%	
													chg to '12 avg		chg to '12 YTD	

**BALANCE OPEN CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2009	3,399	3,158	3,123	3,374	3,763	3,894	3,925	3,860	3,715	4,232	4,896	4,809	3,846			
2010	4,965	5,182	5,394	5,312	5,287	4,996	5,048	5,781	5,494	4,931	4,857	4,658	5,159	515	134%	1,313
2011	4,281	3,977	3,340	3,692	3,792	3,672	3,716	3,772	3,453	3,842	3,698	3,590	3,735	373	72%	-1,423
2012	3,272	3,060	3,509	3,825									3,417	341	91%	-319
Ruling/Other balance of open cases Apr to date is down 11% from 2011, down 34% from 2010, and up 5% from 2009													2011	91%	89%	
Ruling/Other balance monthly average is down 9% from 2011, down 34% from 2010, and down 11% from 2009													2010	66%	66%	
													2009	89%	105%	
													chg to '12 avg		chg to '12 YTD	

ALL PROGRAM TRENDS - FO

NEW OPENED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL	Avg.	% Change	Yr-Yr AvgChg
2009	34,115	30,306	33,645	34,018	34,720	36,687	34,412	33,610	35,623	38,035	29,542	39,222	413,935	34,495		
2010	39,381	36,310	40,820	45,037	39,399	38,140	41,563	43,324	33,493	37,396	31,757	37,369	463,989	38,666	112%	4,171
2011	40,411	36,315	41,141	38,210	38,185	37,903	34,470	40,374	41,888	38,682	32,388	33,369	453,336	37,778	98%	-888
2012	35,262	32,109	38,944	35,539									141,854	35,464	94%	-2,315
13 180 30													2011	94%	91%	
All program registrations Apr to date are down 9% from 2011, down 12% from 2010, and up 7% from 2009													2010	92%	88%	
All program registration monthly average is down 6% from 2011, down 8% from 2010, and up 3% from 2009													2009	103%	107%	
(chg to '12 avg) (chg to '12 YTD)																

CLOSED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL	Avg.	% Change	Yr-Yr AvgChg
2009	27,273	26,451	30,253	32,388	31,481	34,471	36,722	32,474	34,290	41,893	36,461	38,969	403,126	33,594		
2010	34,404	40,009	46,641	42,106	37,589	39,101	37,848	41,243	40,987	39,872	36,622	38,452	474,874	39,573	118%	5,979
2011	35,905	40,146	52,970	37,208	34,144	40,592	35,714	39,116	44,083	36,128	35,054	36,169	467,229	38,936	98%	-637
2012	35,665	39,521	46,692	30,554									152,432	38,108	98%	-828
1/3 4/9 2/4													2011	98%	92%	
All program dispositions Apr to date are down 8% from 2011, down 7% from 2010, and up 31% from 2009													2010	96%	93%	
All program disposition monthly average is down 2% from 2011, down 4% from 2010, and up 13% from 2009													2009	113%	131%	
(chg to '12 avg) (chg to '12 YTD)																

BALANCE OPEN CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Avg.	% Change	Yr-Yr AvgChg	
2009	79,459	83,239	86,674	88,675	91,984	94,025	91,932	93,231	94,499	90,583	83,671	83,874	88,487			
2010	88,772	84,920	78,808	81,554	83,171	81,997	85,167	86,889	79,186	76,869	71,857	70,783	80,831	91%	-7,656	
2011	75,183	71,225	59,203	60,086	64,024	61,203	60,107	61,211	58,886	61,349	58,553	55,653	62,224	77%	-18,608	
2012	55,113	47,540	39,388	44,228									46,567	75%	-15,656	
13 256 275													2011	75%	70%	
All program open balance Apr to date is down 30% from 2011, down 44% from 2010, and down 45% from 2009													2010	58%	56%	
All program open balance monthly average is down 25% from 2011, down 42% from 2010, and down 47% from 2009													2009	53%	55%	
(chg to '12 avg) (chg to '12 YTD)																



AO REPORT TO BOARD -- MONTH OF APRIL 2012

	# Cases	# Appellants	Calendar Yr Avg
REGISTRATIONS	2608	1481	2902
DISPOSITIONS	2747	1723	3147
OPEN BALANCE	2902		4361
PENDING REG. (5/1/12)	1419		
APPEAL RATE	5.60%		

CASE AGING                      31 Days                      MET DOL STANDARD (40 DAYS OR LESS)

TIME LAPSE	DOL STANDARD	EXCEEDED DOL STANDARDS IN ALL CATAGORIES
45 Days (50%)	66.42%	
75 Days (80%)	93.98%	
150 Days (95%)	99.33%	

ADDITIONAL INFORMATION

FO to AO Monthly Report                      3.3  
FO ALJs working in AO                      0

**California Unemployment Insurance Appeals Board  
Board Appeal Summary Report**

	<b>April, 2012</b>	<b>March, 2012</b>	<b>February, 2012</b>	<b>January, 2012</b>
	Average Days in Transfer			
	Case Count	Case Count	Case Count	Case Count
Fresno	1.65	2.86	3.92	4.31
Inglewood	3.60	3.59	6.21	5.74
Inland	3.42	3.65	4.74	5.54
Los Angeles	3.76	4.41	5.56	4.60
Oakland	1.68	4.51	4.39	6.99
Orange County	2.44	3.16	3.94	3.35
Oxnard	2.59	3.64	4.51	3.77
Pasadena	6.92	15.37	11.04	12.22
Sacramento	3.56	3.42	5.07	4.70
San Diego	4.00	4.01	5.45	5.98
San Francisco	2.26	3.58	3.91	3.37
San Jose	3.80	4.23	5.25	7.88
Tax Office	3.38	3.24	3.30	43.05
<b>Total</b>	3.31	4.46	5.30	5.93

WEEKLY AO WORKLOAD REPORT  
April 2012

Week Ending	Unreg total	Appeals Rec'd	Registrations	Dispositions	Open Balance	Change
4/6/2012	1408	917	498	851	2666	-256
4/13/2012	1541	1026	613	574	2712	46
4/20/2012	1636	881	590	532	2781	69
4/27/2012	1378	670	741	701	2821	40
4/30/2012	1419	209	166	89	2900	79
<b>Running Total</b>		<b>3703</b>	<b>2608</b>	<b>2747</b>		

Week Ending	Average Case age	45-Day (50%) Time Lapse	75-Day (80%) Time Lapse	150-Day (95%) Time Lapse
4/6/2012	29	71.38%	94.99%	98.93%
4/13/2012	29	69.01%	94.42%	99.38%
4/20/2012	30	67.49%	94.46%	99.13%
4/27/2012	30	64.66%	93.57%	100.00%
4-1 thru 4-30-12	31	66.42%	93.98%	99.33%

APPELLATE OPERATIONS - REPORT SUMMARY

APPELLATE		2011-2012												Average	AO Current Mo. % of Avg.	TOTAL	Appellants Current Mo.
WORKLOAD	Registrations	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun				
UI TL	2,856	3,104	3,115	3,121	2,223	2,405	2,661	2,205	3,383	2,517	2,759	2,759	27,592	91%	27,592		
Ruling & T-R	131	130	124	118	87	108	99	82	120	66	107	107	1,065	62%	1,065		
Tax	8	9	13	13	6	3	6	6	10	1	8	8	75	13%	75		
Other	23	23	6	43	25	41	22	20	39	23	27	27	265	87%	265		
Total	3,021	3,267	3,259	3,298	2,341	2,561	2,789	2,316	3,555	2,608	2,902	2,902	29,015	90%	29,015	1,481	
Multi Cases		2															
Dispositions	UI TL	2,252	2,722	3,951	3,595	2,976	2,884	2,780	2,960	3,237	2,626	2,998	29,983	88%	29,983		
DI	86	100	133	162	118	111	113	116	140	88	117	117	1,167	75%	1,167		
Ruling & T-R	6	4	11	13	17	8	6	4	7	7	8	8	83	84%	83		
Tax	16	31	19	33	19	17	15	23	21	24	22	22	218	110%	218		
Other	1	3	2	1	0	2	3	3	2	2	2	2	19	105%	19		
Total	2,361	2,860	4,116	3,804	3,130	3,022	2,917	3,106	3,407	2,747	3,147	3,147	31,470	87%	31,470	1,628	
Multi Case/CI						2											
Balance - Open Cases	UI TL	5,700	6,077	5,243	4,766	4,009	3,518	3,398	2,671	2,785	2,703	4,087	4,087	66%			
DI	234	265	254	210	180	177	163	130	109	87	181	181	48%				
Ruling & T-R	16	21	23	23	12	7	7	9	12	6	14	14	44%				
Tax	66	58	45	55	61	85	92	89	108	107	77	77	140%				
Other	4	2	1	3	3	5	3	3	4	3	3	3	97%				
Total	6,020	6,423	5,566	5,057	4,265	3,792	3,663	2,902	3,018	2,908	4,361	4,361	67%	1,659	Estimate		
Multi Cases	2	4	4	4	4	2	2	2	2	2	2	2					
FO to AO Appeal Rate	UI TL	7.5%	9.2%	8.4%	7.5%	6.6%	7.3%	7.8%	6.6%	9.1%	5.6%	7.6%	7.6%	75%			
DI	8.4%	9.5%	8.5%	8.3%	5.5%	8.5%	7.8%	6.1%	7.8%	4.5%	7.5%	7.5%	61%				
Ruling & T-R	1.3%	2.5%	3.4%	2.6%	1.0%	0.8%	1.9%	1.3%	2.3%	0.4%	1.7%	1.7%	22%				
Tax	8.3%	13.7%	2.2%	13.2%	8.5%	12.7%	8.9%	8.8%	11.1%	7.1%	9.5%	9.5%	75%				
Other	2.9%	5.9%	6.3%	12.5%	0.0%	20.0%	3.1%	9.4%	15.8%	2.4%	7.8%	7.8%	31%				
Overall Rate	7.4%	9.1%	8.3%	7.5%	6.5%	7.3%	7.7%	6.5%	9.0%	5.6%	7.5%	7.5%	74%				

APPELLATE OPERATIONS ~ REPORT SUMMARY

APPELLATE		2011-2012												Average	AO			
TIME LAPSE		July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun		Current Mo.			
	45 Day-50 %	10	11	10	12	12	17	17	48	70	66				27	244%		
	75 Day- 80 %	44	40	43	73	86	89	85	91	91	94				74	128%		
	150 Day- 95 %	97	99	99	99	99	99	99	99	99	99				99	100%		
CASE AGE																		
	Avg Days-UJ (mean)	47	48	44	39	38	39	37	32	30	31				39	81%		
	Avg Days-UJ (median)	45	44	42	35	36	38	34	27	25	26				35	74%		
Over 120 days old																		
	UI Cases	31	39	67	42	31	23	29	22	13	18				32	57%		
	UI %	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%				1%	66%		
	UI % w/out Multi	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%				1%	66%		
NET PY'S USED																		
	ALJ	21.15	24.29	26.77	26.77	25.10	22.14	25.40	24.67						24.5	101%		
	AO Non ALJ	33.72	38.48	36.80	39.48	32.35	32.78	33.15	34.75						35.2	99%		
	CTU Non ALJ	4.84	4.86	5.17	5.44	3.40	3.87	4.93	4.59						4.6	99%		
	Net PYs	59.71	67.63	68.74	71.69	60.85	58.79	63.48	64.01	0.00	0.00				64.4	99%		
RATIOS																		
	AO w/o transcribers	1.59	1.58	1.37	1.47	1.29	1.48	1.31	1.41						1.43	98%		
	AO with transcribers	1.82	1.78	1.57	1.68	1.42	1.66	1.50	1.59						1.62	98%		
TRANSCRIPTS																		
	PAGES	124	106	163	127	84	144	115	132	130	123				125	99%	1,248	
	AVG PGS Per T/S	9,492	7,593	11,689	9,142	7,070	10,289	8,801	11,236	9,726	8,409				9,345	90%	93,447	
	AVG PGS Per T/S	77	72	72	72	84	71	77	85	75	68				75	91%		
PRODUCTIVITY																		
	ALL Disp/ck	26.6	26.8	36.6	33.8	32.8	32.5	28.7	31.5						31.2	101%		
	Trans Pgs/day	93.39	71.02	107.66	80.02	109.44	126.60	89.26	122.40						100.0	122%		

**ALL PROGRAM TRENDS-AO**

**REGISTRATIONS**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Number Change	
2009	1,588	1,326	1,964	1,835	1,717	1,956	2,368	2,026	2,187	2,158	2,056	2,225	23,406	1,951			
2010	2,470	2,136	3,081	2,779	2,362	2,691	2,518	2,957	3,089	2,658	2,796	2,721	32,258	2,688	138%	738	
2011	2,506	2,625	3,779	3,046	3,318	2,971	3,021	3,267	3,259	3,298	2,341	2,561	35,992	2,999	112%	311	
2012	2,789	2,316	3,555	2,608									11,268	2,817	94%	-182	
													2011	94%	94%		
													2010	105%	108%		
													2009	144%	168%		
																chg to 12 avg	
																	chg to 12 YTD

Registrations Jan to date down 6% from 2011, up 8% from 2010, and up 68% from 2009.  
 Registration monthly average down 6% from 2011, up 5% from 2010, and up 44% from 2009.

**DISPOSITIONS**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Number Change	
2009	1,609	1,599	1,780	1,556	1,533	1,780	1,827	1,867	1,919	2,354	2,005	2,991	22,820	1,902			
2010	2,210	2,634	2,764	2,707	2,534	2,949	2,352	2,657	2,647	2,853	2,565	2,360	31,232	2,603	137%	701	
2011	2,601	2,626	2,583	2,546	2,994	3,447	2,361	2,860	4,116	3,804	3,130	3,022	36,090	3,008	116%	405	
2012	2,917	3,106	3,407	2,747									12,177	3,044	101%	37	
													2011	101%	118%		
													2010	117%	118%		
													2009	160%	186%		
																chg to 12 avg	
																	chg to 12 YTD

Dispositions Jan to date up 18% from 2011, up 18% from 2010, and up 86% from 2009.  
 Disposition monthly average up 1% from 2011, up 17% from 2010, and up 60% from 2009.

**BALANCE OPEN CASES**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Number Change	
2009	2,379	2,093	2,270	2,555	2,734	2,906	3,446	3,599	3,849	3,649	3,703	2,918	36,101	3,008			
2010	3,177	2,668	3,000	3,058	2,886	2,635	2,837	3,135	3,591	3,387	3,626	3,973	37,973	3,164	105%	156	
2011	3,872	3,870	4,984	5,543	5,814	5,356	6,020	6,423	5,566	5,057	4,265	3,792	60,562	5,047	159%	1,882	
2012	3,663	2,902	3,018	2,906									12,489	3,122	62%	-1,925	
													2011	62%	68%		
													2010	99%	105%		
													2009	104%	134%		
																chg to 12 avg	
																	chg to 12 YTD

Open Balance Jan to date down 32% from 2011, up 5% from 2010, and up 34% from 2009.  
 Open Balance monthly average down 38% from 2011, down 1% from 2010, and up 4% from 2009.

Board Member	1st	2nd	3rd	UI	DI	Ruling	Tax	1 Party	2 Party	Total
<b>Alberto Torrico</b>										
Sum	409	404	10	759	56	3	5	335	488	823
Percent	26%	25%	10%	25%	33%	30%	21%	29%	23%	
<b>Bonnie Garcia</b>										
Sum	324	349	3	630	38	2	6	243	433	676
Percent	20%	22%	3%	20%	22%	20%	25%	21%	20%	
<b>Kathleen Howard</b>										
Sum	336	323	4	627	29	2	5	204	459	663
Percent	21%	20%	4%	20%	17%	20%	21%	17%	22%	
<b>Robert Dresser</b>										
Sum	116	103	85	291	12	0	1	85	219	304
Percent	7%	6%	83%	9%	7%	0%	4%	7%	10%	
<b>Roy Ashburn</b>										
Sum	409	412	0	777	34	3	7	306	515	821
Percent	26%	26%	0%	25%	20%	30%	29%	26%	24%	
<b>Total Cases Reviewed:</b>	1594	1591	102	3084	169	10	24	1173	2114	

\*Off Calendar

# Monthly Board Meeting Litigation Report - April 2012

AGENDA ITEM 9

<u>LITIGATION CASES PENDING</u>	TOTAL = 317
<b>SUPERIOR COURT:</b> Claimant Petitions.....	265
Employer Petitions.....	26
EDD Petitions.....	3
Non-benefit Court Cases .....	7
<b>APPELLATE COURT:</b> Claimant Appeals.....	9
Employer Appeals.....	4
EDD Appeals.....	0
Non-benefit Court Cases .....	1
<b>ISSUES:</b> UI.....	275
DI.....	19
Tax.....	13
Non-benefit Court Cases .....	10

## 2012 CALENDAR YEAR ACTIVITY - Benefit & Tax Cases

<u>LITIGATION CASES FILED</u>	<u>YTD</u>	<u>April</u>
<b>SUPERIOR COURT:</b> Claimant Petitions.....	46	13
Employer Petitions.....	9	0
EDD Petitions.....	0	0
<b>APPELLATE COURT:</b> Claimant Appeals.....	0	0
Employer Appeals.....	0	0
EDD Appeals.....	0	0
 <u>LITIGATION CASES CLOSED</u>	 <u>YTD</u>	 <u>April</u>
<b>SUPERIOR COURT:</b> Claimant Petitions.....	24	9
Employer Petitions.....	5	1
EDD Petitions.....	0	0
<b>APPELLATE COURT:</b> Claimant Appeals.....	4	2
Employer Appeals.....	0	0
EDD Appeals.....	0	0

## 2012 Decision Summary

<u>Claimant Appeals</u>		<u>Employer Appeals</u>		<u>CUIAB Decisions</u>		
Win: 8	Loss: 20	Win: 0	Loss: 5	Affirmed: 25	Reversed: 7	Remanded: 1

CUIAB 11/12 Fiscal Year Overtime/Lump Sum Payout - SCO Report  
July 2011 through March 2012

11/12 Fiscal Year-to-Date Overtime Expenditure

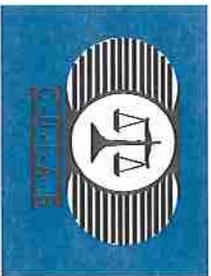
Branch	FY Y-T-D Decision Typing		FY Y-T-D CTU Typing		FY Y-T-D Registration		FY Y-T-D Other	
	Hours	Pay	Hours	Pay	Hours	Pay	Hours	Pay
Appellate	868.60	\$22,739.21	1,641.00	\$48,683.62	1,207.80	\$32,957.00	2,175.95	\$53,322.48
Admin	40.75	\$1,604.34	0.00	\$0.00	0.00	\$0.00	1,016.00	\$40,657.85
IT	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	1,580.75	\$65,911.24
Exec	20.00	\$872.82	0.00	\$0.00	251.50	\$11,228.29	118.00	\$3,630.38
Project	0.00	\$0.00	0.00	\$0.00	46.50	\$2,105.30	22.00	\$863.74
Field	353.00	\$10,829.40	0.00	\$0.00	6,411.95	\$189,889.22	7,950.25	\$232,662.67
<b>Total</b>	<b>1,282.35</b>	<b>\$36,045.77</b>	<b>1,641.00</b>	<b>\$48,683.62</b>	<b>7,917.75</b>	<b>\$236,179.81</b>	<b>12,862.95</b>	<b>\$397,048.36</b>

Branch	11/12 Fiscal Year-to-Date Total Overtime Expenditures				FY 11/12 FY Projections		
	11/12 FY Allocation	Year-to-Date Hours	Year-to-Date Position Equivalent	Year-to-Date Pay	Allocation Balance	Estimated Expenditures Over-/Under	
Appellate	\$52,599.00	5,893.35	2.83	\$157,702.31	<b>-\$105,103.31</b>	<b>-\$157,670.75</b>	
Admin	\$90,306.00	1,056.75	0.51	\$42,262.19	\$48,043.81	\$33,956.41	
IT	\$123,050.00	1,580.75	0.76	\$65,911.24	\$57,138.76	\$35,168.35	
Exec	\$21,977.00	389.50	0.19	\$15,731.49	\$6,245.51	\$1,001.68	
Project	\$0.00	68.50	0.03	\$2,969.04	<b>-\$2,969.04</b>	<b>-\$5,195.82</b>	
Field Operations	\$864,113.00	14,715.20	7.08	\$433,381.29	\$430,731.71	\$286,271.28	
<b>Total</b>	<b>1,152,045.00</b>	<b>23,704.05</b>	<b>11.40</b>	<b>\$717,957.56</b>	<b>\$434,087.44</b>	<b>\$193,531.15</b>	
Actual Monthly Average Personnel Year							15.20

11/12 Fiscal Year-to-Date Lump Sum Payout  
July 2011 through March 2012

Branch	Year-to-Date Hours	Year-to-Date Position Equivalent	Year-to-Date Pay
Appellate	522.70	0.25	\$13,844.55
Admin	861.00	0.41	\$23,462.47
IT	0.00	0.00	\$0.00
Exec	1,002.00	0.48	\$62,015.25
Project	0.00	0.00	\$0.00
Field Operations	8,917.84	4.29	\$350,290.66
<b>Total</b>	<b>11,303.54</b>	<b>5.44</b>	<b>\$449,612.93</b>

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## CALIFORNIA UNEMPLOYMENT INSURANCE APPEALS BOARD

### SPECIAL PROJECTS MATRIX

May 2012

California's economy is globally ranked with approximately 1.0 million business owners and 18.2 million workers. Currently, California, along with the nation, is experiencing an immense economic downturn with 2.0 million California workers out of work. These are unprecedented numbers for California and the nation. Given this current economic situation, we strive to better serve California's workers and business owners during a time when more than ever, they are in need of our services. Since January 2009, the Board has been focused on the appeal backlog and identifying work solutions that will help address the workload.

#### WORK PROCESS IMPROVEMENTS

Project & Description	Lead	Priority	Milestones	Goals	Status
<b>EDD/CUIAB Appeal Co-Location Pilot</b> Exploring the co-location of four CUIAB staff at EDD's LA PAC to streamline appeals registration processing.		High	Developed scope with EDD 07/2010 Connectivity established 08/2010 Train staff 09/20/2010 Launch Pilot 09/27/2010 Suspended due to freeze 10/04/2010 Relaunch 09/13/2011	<ul style="list-style-type: none"> <li>- Reduce claimants' &amp; employers' wait time for hearing decisions.</li> <li>- Resolve appeal registration issues in a timely manner.</li> </ul>	Scanning for 2 FOs – Pasadena & LA. LA FO is hiring 3 staff to fully implement pilot. Hires are pending in LA.
<b>US Department of Labor Taskforce</b> For nine years, CUIAB has failed to meet US DOL timeliness standards for UI appeals. California is ranked 51 <sup>st</sup> among 53 states and US territories on time lapse and case aging standards. In late 2008, US DOL placed CUIAB under a corrective action plan with oversight by a taskforce of US DOL, EDD & CUIAB representatives.		High	Appeal program review 07/27-31/2009 DOL report 02/05/2010 LMDA response 03/10/2010 Two yr AI Risk CAP 07/15/2010 Site visit 04/18/2012	<ul style="list-style-type: none"> <li>- Meet DOL time lapse measures.</li> <li>- Meet DOL case age measures.</li> </ul>	March 2012 Performance – first level Rank 46th 30-day – 16% (60%) 45 day – 61% (80%) Avg Age – 23 days (30 days)
<b>CUIAB Network Upgrade</b> This upgrade will double the bandwidth for faster processing of appeal data and information for ALJs and staff.	Rafael Placencia	High		<ul style="list-style-type: none"> <li>- Reduce cycle time for appeals data flow and document saving.</li> </ul>	Meeting with EDD IT to explore options & alignment with Agency network consolidation efforts. Design plans are completed.
<b>Collate Decision Print Jobs</b> Reduce a manually collated appeal decision print jobs to one print job to save staff time.	Hugh Harrison Julie Krebs Lori Kurosaka Faye Saunders	High		<ul style="list-style-type: none"> <li>- Reduce claimants' &amp; employers' wait times for benefits and adjustments.</li> <li>- Reduce cycle time for appeals process.</li> </ul>	IT presented high level requirement for FO decisions on 03/13/2012 for user review. Solution will be implemented with new E-CATS release in Summer 2012.

**TECHNOLOGY**

Project & Description	Lead	Priority	Milestones	Goals	Status
<p><b>Digital Imaging</b> EDD mails hard copy documents to CUIAB when an appeal is filed. CUIAB will collaborate with EDD to image documents and records relating to all appeals and design an electronic exchange.</p>	Lori Kurosaka	High	<p>Kick off 11/2010 FSR completion 02/2011 Potential BCP 02/2011 Procurement 04/2011 FSR in review 03/14/2011 FSR in review 11/30/2011</p>	<ul style="list-style-type: none"> <li>- Reduce paper files prepared &amp; sent by EDD.</li> <li>- Increase information security.</li> <li>- Reduce paper file storage space needs &amp; costs at CUIAB.</li> <li>- Reduce postage costs.</li> <li>- Increase federal performance.</li> </ul>	<p>DOL approved funding at \$354,000 for planning phase only. Project and procurement strategy approved by LWDA &amp; EDD. Six week start delay due to OCIO approval. Request to EDD programs for estimated project costs in 01/2011. Narrative revisions completed per Agency comments in May 2011. EDD cost estimates received 09/09/2011. Project team met with EDD 10/24 to review and clarify assumptions for their costs. Finalizing narrative with EDD programs.</p>
<p><b>Electronic Case Management</b> CUIAB's case tracking database is 10 years old and cumbersome to manage the current workload volume. CUIAB is collaborating with LWDA &amp; EDD to develop an integrated case management system.</p>	Lori Kurosaka Janet Maglente	<b>On Hold</b>	<p>LWDA, EDD &amp; CUIAB approved FSR &amp; project strategy in 10/2010. Kick off 05/2011.</p>	<ul style="list-style-type: none"> <li>- Receive appeals case documents electronically from EDD.</li> <li>- Eliminate internal mailing of case documents</li> </ul>	<p>DOL approved funding at \$404,000 for the planning phase only. EDD is too busy to participate in FSR development. FSR is complete and on-hold to complete imaging project first as of 09/2011.</p>
<p><b>E-CATS</b> Enhanced CA Appeal Tracking System is the modernization of CUIAB's legacy appeals tracking system. In-house IT staff are developing the system on a Microsoft web application framework</p>	Faye Saunders	High		-	<p>Users will see enhancements such as new and improve screen search, efficiency in decision printing, and IT ability to roll-out updates via the internet. Implementation scheduled for Summer 2012.</p>
<p><b>Expand Auto Dialer Hearing Reminder</b> Adding email and cell phone text features for supplemental hearing notifications.</p>	Rafael Placencia	High	<p>Updated software. Final testing 08/2010. Implemented 09/2010. Implemented email reminders 04/2011. Revised 10/2011.</p>	<ul style="list-style-type: none"> <li>- Increase hearing attendance rate &amp; productivity.</li> </ul>	
<p><b>Explore Feasibility to Use EDD Mail Center</b> Within three months, Field Operations wants to explore feasibility of mailing decisions and notices via the EDD Mail Center to take advantage of bulk postal discounts and save staff resources.</p>	Hugh Harrison Lori Kurosaka Faye Saunders	High		-	<p>Held planning meeting with EDD on 04/12/2012 for requirements gathering and costing. Identifying existing model costs and estimating project cost estimates. Held requirements gathering session with FO &amp; AO on 05/02/2012.</p>
<p><b>Field Office Technology Enhancements</b> Investing and testing use of larger sized monitors for hearing rooms. Provide second monitors for support staff to toggle into SCDB without interrupting their CATS.</p>	Rafael Placencia	Medium	<p>Complete procurement</p>	<ul style="list-style-type: none"> <li>- Improve readability of documents on screen.</li> </ul>	<p>Hardware deployment</p>

**TECHNOLOGY cont.**

Project & Description	Lead	Priority	Milestones	Goals	Status
<b>Field Office Telephone Tree</b> Field Operations will test the use of phone menu options to answer routine constituent calls. This will allow support staff to spend more time on the non-routine calls.	Rafael Placencia	Medium	Develop standard automated phone tree to be used for all FOC's Pilot new phone tree in the Inland FO	<ul style="list-style-type: none"> <li>- Reduce claimants &amp; employers time on phones.</li> <li>- Standardize hearing information provided by phone.</li> </ul>	Standard phone tree design completed. Pilot began in the Inland FO. IT & Admin are developing evaluation tool to measure pilot effectiveness.
<b>Hearing Scheduling System</b> Currently, FO & AO support staff schedule or assign appeal hearings or cases using a hybrid manual process. Appellate, Field & IT staff observed an EDD demon on their UI Scheduling System.	Lori Kurosaka Faye Saunders	High	Charter & scope completed. Kick off 10/14/2010. Requirements 2/2011 Testing began 01/2012 Implementation 04/26/2012	<ul style="list-style-type: none"> <li>- Reduce claimants &amp; employers wait time for hearing decisions.</li> <li>- Provide easier electronic process for staff to calendar hearings or schedule cases.</li> </ul>	Implemented in AO on 04/26/2012. Allowing for 20 days post implementation review and will hold kick-off with FO for requirements gathering.
<b>LWDA Network Consolidation</b> To comply with OCIO Policy Letter 10-14, the LWDA Departments & Boards are developing a network consolidation plan that must be completed by June 2013.	Rafael Placencia	Medium	LWDA Workgroup develops migration plan. Consensus on migration plan. Implementation	<ul style="list-style-type: none"> <li>- Improve IT efficiency &amp; effectiveness.</li> <li>- Improve security.</li> <li>- Reduce IT costs by using shared service models.</li> <li>- Reduce greenhouse gas emissions.</li> </ul>	The migration plan is completed and a cost model has been developed.
<b>Personal Productivity &amp; Mobility Pilot for Board Members, Appellate &amp; Senior Staff</b> Testing use of new mobile, paperless technology with Board Members, six Appellate ALJs, and Senior Staff.	Rafael Placencia	<b>On Hold</b> due to air card limitations	OCIO approval for procurement. Testing equipment with Board.	<ul style="list-style-type: none"> <li>- Reduce the use of paper for board appeal processing and board meetings.</li> </ul>	Scoped down due to GO directive on cell phone (air card) reductions.
<b>Printer Standardization</b> Standardizes the use of printers throughout the organization as they are replaced. This will reduce maintenance and toner costs through the printers lives.	Rafael Placencia	Medium		<ul style="list-style-type: none"> <li>- Reduce maintenance &amp; support costs.</li> <li>- Reduce toner costs.</li> </ul>	Researching feasible equipment. Standards are in place for light, heavy, color, and multi-function printers.
<b>VOIP Telephony</b> CUIAB is exploring use of Voice Over Internet technology to provide lower cost telecommunications.	Rafael Placencia Janet Maglinte	<b>On Hold</b>	09/17/2011 Completed 23out station hearing facilities.	<ul style="list-style-type: none"> <li>- Elimination of long distance toll calls</li> <li>- Consolidation of telecommunications support areas.</li> </ul>	On hold 07/2011. IT staff are preparing business analysis for feasibility of further implementation.

**STAFFING, FACILITIES, EQUIPMENT & OTHER**

Project & Description	Lead	Priority	Milestones	Goals	Status
<p><b>Archive File Document Conversion</b> Each FO is retaining three years of completed paper appeal case files that are sitting in considerable real estate space. The file room space may be easily converted to ALJ offices or hearing rooms.</p>	<p>Lori Kurosaka Pat Houston</p>	<p>High</p>	<p>MSA vendor contract executed 01/2010. OC, Inland, LA, Oxnard, San Jose, San Diego, LA, Sacto, SF, Appellate complete Vendor quality checks 04/05, 05/06, 08/19. Vendor quality check 05/09</p>	<ul style="list-style-type: none"> <li>- Recapture real estate space for ALJ offices and hearing rooms.</li> <li>- Priority conversion for OC, Inland, LA, San Jose &amp; Oxnard.</li> </ul>	<p>Extended vendor contract to 12/31/2012. CUIAB IT working on solution to scan files in FO.</p>
<p><b>Judicial Advisory Council</b> Established an advisory council of two Presiding Judges &amp; three ALJs to seek input on major technology development.</p>	<p>Lori Kurosaka Janet Maglinte</p>	<p>High</p>	<p>07/2011-Completed business requirements for case management system.</p>	<ul style="list-style-type: none"> <li>- Design comprehensive technology systems with input from judicial users.</li> </ul>	<p>Updating business requirements for imaging &amp; workflow system. Testing ergonomic furniture to help judges to adopt new technology.</p>
<p><b>Performance Management Tools for Board &amp; Leadership</b> Develop additional reporting tools that the Board &amp; Leadership will use to monitor overall appellate performance and appeal process cycle times. These tools will also help to measure success with the large scale technology projects.</p>	<p>Janet Maglinte</p>	<p>High</p>	<p>Business case metrics for imaging Business case metrics for case management Tested report template designs with IT.</p>		<p>Design &amp; test Appellate Operations cycle time and case aging reports. Field Operations performance indicator reports are complete.</p>
<p><b>Staff Advisory Council</b> Established an advisory council of six Field Operations staff and two Appellate staff to seek input on major technology development.</p>	<p>Lori Kurosaka Janet Maglinte</p>	<p>High</p>		<ul style="list-style-type: none"> <li>- Design comprehensive technology systems with input from staff users.</li> </ul>	<p>First assignment is to redesign appeal forms as smart forms.</p>
<p><b>Transforming CUIAB</b> Engage a consultant to help plan and guide the leadership team through organizational change management. A consultant will assist with defining organizational structure, proactive communications with stakeholders, identify staff skill sets needed for new technology, etc. to maximize user acceptance of new technology.</p>	<p>Rafael Placencia Pam Boston Lori Kurosaka</p>	<p>High</p>	<p>Release RFO 03/18/2011 Rerelease RFO 05/12/2011 Bids due 05/31/2011. Intent to award 06/10/2011. Deliverable1 completed 10/2011.</p>	<ul style="list-style-type: none"> <li>- Plan, design and implement organizational design for the large scale technology projects.</li> <li>- Plan and coordinate communications with all stakeholder groups.</li> </ul>	<p>Vendor staff preparing analysis on as-is duty statements. Conducting interviews to validate duties/functions and assess communication needs. Vendor staff are assessing how technology with transform staff roles.</p>