



SPECIAL PROJECT REPORT

for

Shared Customer Portal

Prepared by

Employment Development Department

February 2025

Project Approval Lifecycle (PAL) Registration No:

7100-236

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Special Project Report

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INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION A: EXECUTIVE SUMMARY

Information Technology Project Request
Special Project Report



1.0 Executive Approval Transmittal

Agency/state entity Name

Employment Development Department

Project Title (maximum of 75 characters)

Shared Customer Portal Enhancements

Project Acronym

SCP

PAL Project ID	Approval Dates	State Entity Priority	Agency Priority
7100-236	S1BA/Project Delegation Approval – 8/22/2022 SPR 1 approval– 1/10/2024	2	3

I am submitting the attached Special Project Report (SPR 2) in support of our request for the California Department of Technology's (CDT) approval to change the scope of the SCP project.


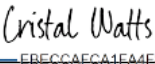
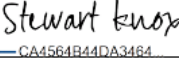
I certify:

- The SPR was prepared in accordance with the State Administrative Manual Sections 4945-4945.2, my Agency/state entity has considered the cost benefits analysis associated with the proposed project changes, and the changes are consistent with our information management strategy as expressed in our current Agency Information Management Strategy (AIMS).
- The acquisition of the applicable information technology (IT) product(s) or service(s) required by my department that are subject to Government Code 7405 applying Section 508 of the Rehabilitation Act of 1973, as amended meets the requirements or qualifies for one or more exceptions (see following page).

I have reviewed and agree with the information in the attached SPR.

DocuSign signatures are included as an attachment with the submission package.

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION A: EXECUTIVE SUMMARY

Approval Signatures		
DocuSigned by: EDDNext Branch Chief		Date Signed
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <small>D7E3E35DD7804CB</small></div>		2/14/2025
Printed Name:	Ajit Girn (Acting)	
DocuSigned by: Chief Information Officer		Date Signed
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <small>D7E3E35DD7804CB</small></div>		2/14/2025
Printed Name:	Ajit Girn	
DocuSigned by: Budget Officer		Date Signed
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <small>EBECCAFCA1F44F8</small></div>		2/21/2025
Printed Name:	Cristal Watts	
DocuSigned by: State Entity Director		Date Signed
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <small>116E89289B9C4AF</small></div>		2/25/2025
Printed Name:	Nancy Farias	
Signed by: Agency Information Officer		Date Signed
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <small>F40180E21BE84B8</small></div>		2/27/2025
Printed Name:	Brian Wong	
DocuSigned by: Agency Secretary		Date Signed
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <small>CA4564B44DA3464</small></div>		2/27/2025
Printed Name:	Stewart Knox	

Executive Approval Transmittal

1.1 IT Accessibility Certification

Yes or No

Yes	The Proposed Project Meets Government Code 11135 / Section 508 Requirements, and no exceptions apply.
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Exceptions Not Requiring Alternative Means of Access

Yes or No	Accessibility Exception Justification
No	The IT project meets the definition of a national security system.
No	The IT project will be located in spaces frequented only by service personnel for maintenance, repair, or occasional monitoring of equipment (e.g., "Back Office Exception.")
No	The IT acquisition is acquired by a contractor incidental to a contract.

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION A: EXECUTIVE SUMMARY

Exceptions Requiring Alternative Means of Access for Persons with Disabilities

Yes or No	Accessibility Exception Justification
No	<p>Meeting the accessibility requirements would constitute an “undue burden” (e.g., a significant difficulty or expense considering all agency resources).</p> <p>Explain:</p> <p>Describe the alternative means of access that will be provided that will allow individuals with disabilities to obtain the information or access the technology.</p>
No	<p>No commercial solution is available to meet the requirements for the IT project that provides for accessibility.</p> <p>Explain:</p> <p>Describe the alternative means of access that will be provided that will allow individuals with disabilities to obtain the information or access the technology.</p>

Exceptions Requiring Alternative Means of Access for Persons with Disabilities

Yes or No	Accessibility Exception Justification
No	<p>No solution is available to meet the requirements for the IT project that does not require a fundamental alteration in the nature of the product or its components.</p> <p>Explain:</p> <p>Describe the alternative means of access that will be provided that will allow individuals with disabilities to obtain the information or access the technology.</p>

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION A: EXECUTIVE SUMMARY

2.0 Information Technology: Project Summary Package (PSP)

2.1 Section A: Executive Summary

1.	Submittal Date	February 2025
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		SPR	PSP Only	Other:
2.	Type of Document	x		
	Project Number	7100-236		

			Estimated Project Dates	
3.	Project Title	Shared Customer Portal Enhancements	Start	End
	Project Acronym	SCP	07/01/22 PDR	SPR 2 End Date

4.	Submitting Agency/state entity	Employment Development Department
5.	Reporting Agency/state entity	Labor and Workforce Development Agency
6.	Project Objectives	

To create an online account with the EDD, customers are required to provide their email address and choose four security questions, along with their responses. They are also required to set a password, personal image, and caption. However, the current login process is complex and doesn't provide much security. As a result, customers often challenged to manage their accounts, leading to increased contact center volumes related to account management. This issue was identified in the Governor's Strike Team Recommendation #89.

To address these concerns, the Shared Customer Portal (SCP) project aims to modernize the EDD's Benefit Programs Online (BPO) portal. The SCP will offer customers with a secure, user-centered experience while accessing applications such as Unemployment Insurance Online (UIO), State Disability Insurance Online (SDIO), and Benefit Overpayment System (BOS) applications. The project proposes simplifying the account creation process and transitioning to a Software as a Service (SaaS) model to ensure high availability and scalability. The latest Identity, Credential, and Access Management (ICAM) solution will be integrated to mitigate the risk of fraudulent account creation. Additionally, new technologies will enhance the customer experience by streamlining and securing the registration and login procedures.

7.	Proposed Solution
<p>After the implementation of the SCP in June 2023, the EDD is proposing development and implementation of the following enhancements to the SCP to further enhance the customer experience:</p> <ol style="list-style-type: none">1. Make the SCP content available in six additional languages other than English and Spanish to meet the requirements of the Legal Aid Foundation of Los Angeles (LAFLA) settlement.2. Enhance user administration functions to improve the EDD staff's efficiency in accessing and updating customer information when responding to customer support calls.3. Provide Claims intuitive navigation with scripted questions to guide customers to the appropriate Benefit Services.4. Develop enhanced Data Analytics and Reporting capabilities to allow the EDD staff to improve customer service.	

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION A: EXECUTIVE SUMMARY

8.	Major Milestones	Est. Completion Date
	SCP Enhancements	
	1. Multiple Languages (Shared Customer Portal - LAFLA Settlement Language Enhancements)	03/28/2024 (Completed on schedule)
	2. Enhanced User Administration	12/09/2024
	3. Claim Intake Navigator	6/30/2025
	4. Enhanced Data Analytics and Reporting capabilities	6/30/2025

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION A: EXECUTIVE SUMMARY

2.2 Section B: Project Contacts

Project #	7100-236
Doc. Type	SPR

Executive Contacts					
	First Name	Last Name	Area Code	Phone #	E-mail
Agency Secretary	Stewart	Knox	916	653-9953	Stewart.Knox@labor.ca.gov
State Entity Director	Nancy	Farias	916	654-8210	Nancy.Farias@edd.ca.gov
Budget Officer	Cristal	Watts	916	654-7131	Cristal.Watts@edd.ca.gov
CIO	Ajit	Girn	916	653-8546	Ajit.Girn@edd.ca.gov
Proj. Sponsor	Ajit	Girn	916	653-8546	Ajit.Girn@edd.ca.gov

Direct Contacts					
	First Name	Last Name	Area Code	Phone #	E-mail
Doc. prepared by	Jamal	Hassan	916	596-8519	Jamal.Hassan@edd.ca.gov
Primary contact	Jeff	Loverde	916	654-9335	Jeff.Loverde@edd.ca.gov
Project Manager	Supreet	Madan	916	764-7464	Supreet.Madan@edd.ca.gov

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION C: PROJECT RELEVANCE TO STATE AND/OR DEPARTMENTAL PLANS

2.3 Section C: Project Relevance to State and Agency/state entity Plans

Project #	7100-236
Doc. Type	SPR

1.	What is the date of your current Technology Recovery Plan (TRP)?	Date	07/2017
2.	What is the date of your current Agency Information Management Strategy (AIMS)?	Date	2017-2021
3.	For the proposed project, provide the page reference in your current AIMS and/or strategic business plan.	Doc.	EDD Strategic Plan
		Page #	3

4.	Is the project reportable to control agencies?	YES	NO
	If YES, CHECK all that apply:	X	
<input checked="" type="checkbox"/>	a) The project involves a budget action.		
<input type="checkbox"/>	b) A new system development or acquisition that is specifically required by legislative mandate or is subject to special legislative review as specified in budget control language or other legislation.		
<input checked="" type="checkbox"/>	c) The estimated total development and acquisition costs exceed the Department of Technology's established Agency/state entity delegated cost threshold and the project does not meet the criteria of a desktop and mobile computing commodity expenditure (see SAM 4989 – 4989.3).		
<input type="checkbox"/>	d) The project meets a condition previously imposed by the Department of Technology.		

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION D: BUDGET INFORMATION

2.4 Section D: Budget Information

Project #	7100-236
Doc. Type	SPR

Budget Augmentation Required?								
	No							
	Yes	X**	If YES, indicate fiscal year(s) and associated amount:					
	FY 22/23 ¹ (actuals)	FY 23/24 ² (actuals + partial M&O)	FY 24/25 ³ (project costs + full year M&O)	Total	FY 25/26 ⁴ (continuing costs)	FY 2026-27 ⁵ (continuing costs)	FY 2027-28 (continuing costs)	FY 2028-29 (continuing costs)
BCP Amounts	\$25,118,000	\$45,550,000	\$35,066,000	\$105,734,000	\$8,400,000 *	\$35,245,459*	\$35,245,459*	\$35,245,459*
SPR 2 Amounts	\$24,183,544	\$48,736,619 *	\$36,671,958 *	\$109,592,121	\$35,245,459**			
Variance	\$934,456	(\$3,186,619)	(\$1,605,958)	(\$3,858,121)	(\$26,845,459) ***			
Expenditure Adjustments	\$14,000,000*	(\$835,643) **	\$5,000,000**	\$18,164,357	N/A			

Note: see footnotes for additional detail.

¹ FY22/23: *EDD is utilizing unused funding first, an expenditure adjustment was made to add \$14,000,000 to help offset future year costs.

² FY 23/24: *SPR 2 amount reflects planning costs of \$3,828,672, project costs \$36,084,766 and three (3) months of M&O at \$8,823,179. **EDD is utilizing unused funding first (including previous fiscal years), EDD used previous FY 22/23 funding to offset FY 23/24 variance. An expenditure adjustment was made to move \$835,643.00 to another workstream since SCP would not of encumbered the funds on a deliverable based contract in time.

³ FY 24/25: *SPR 2 reflects planning costs of \$321,880 and project costs of \$1,104,619 that continues until SPR 2 end date. Also included is one full year of M&O at \$35,245,459; **EDD is utilizing unused funding first (including previous fiscal years), an expenditure adjustment was made to add \$5,000,000 to SCP to help offset current and future year costs.

⁴ FY 25/26: *EDD requested \$8,400,000 in FY 25/26 to use toward continuing costs; **SPR 2 requires \$35,245,459 in continuing costs; *** EDD is utilizing unused funding first (including previous fiscal years), EDD will use previous FY 24/25 funding to offset FY 25/26 variance in continuing costs.

⁵ *EDD will require \$35,245,459 a year until ICMS replaces the current functionalities of SCP. \$35,245,459 includes M&O and Personal Services.

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION D: BUDGET INFORMATION

Project Costs: SPR 1 (As Approved on 01/10/2024)

1.	Fiscal Year	22/23	23/24	24/25	25/26 (M&O)	TOTAL
2.	Planning Costs	\$967,199	\$7,196,727	\$0	\$0	\$8,163,926
3.	One-Time Cost	\$36,136,436	\$76,894,392	\$54,302,384	\$0	\$ 167,333,212
4.	Continuing Costs	\$0	\$0	\$0	\$46,956,081	\$46,956,081
5.	TOTAL PROJECT BUDGET	\$37,103,635	\$84,091,119	\$54,302,384	\$46,956,081	\$ 222,453,219

Project Costs: SPR 2

6.	Fiscal Year	22/23	23/24	24/25	TOTAL
7.	Planning Costs	\$2,393,952*	\$3,828,672*	\$321,880	\$6,544,505
8.	One-Time Cost	\$21,789,592*	\$36,084,768*	\$1,104,619	\$58,978,978
9.	Continuing Costs	\$0	\$8,823,179	\$35,245,459**	\$44,068,638
10.	TOTAL PROJECT BUDGET	\$24,183,544	\$48,736,619	\$36,671,958	\$109,592,121

*Actuals **Full Year M&O

PROJECT FINANCIAL BENEFITS

11.	Cost Savings/Avoidances	\$0	\$0	\$0	\$0	\$0
12.	Revenue Increase	\$0	\$0	\$0	\$0	\$0

**INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION E: VENDOR PROJECT BUDGET**

2.5 Section E: Vendor Project Budget

Project #	7100-236
Doc. Type	SPR

Vendor Cost for SPR Development (if applicable)	N/A
Vendor Name	N/A

Consulting and Professional Services Vendor Budget: SPR # 1 (As Approved)

Consulting and Professional Services: External (5340580- Consulting and Professional Services - External) (e.g., System Integrator (SI) Vendor, Solution Vendor, IV&V, PM Vendor)	2022/23	2023/24	Total Planning Costs	2022/23	2023/24	2024/25	Project Total
Project Management/Project Executive/Advisor	\$88,000	\$741,000	\$829,000	\$964,000	\$2,224,000	\$798,000	\$3,986,000
Quality Assurance/Quality Control				\$931,000	\$3,039,000	\$913,000	\$4,883,000
Enterprise Architecture	\$150,000	\$847,000	\$997,000	\$1,650,000	\$2,540,000	\$1,018,00	\$5,208,000
Governance/Data Governance	\$91,000	\$97,000	\$188,000	\$1,002,000	\$291,000	\$116,000	\$1,409,000
Vendor Procurement		\$55,000	\$55,000		\$166,000	\$230,000	\$396,000
Technology Transition Support		\$73,000	\$73,000		\$220,000	\$107,000	\$327,000
Consulting Services (IV&V)				\$427,000	\$1,246,000	\$374,000	\$2,047,000
Organizational Change Management	\$55,500	\$544,000	\$599,500	\$2,562,500	\$1,632,000	\$1,635,000	\$5,829,500
Customer Experience Program					\$233,000	\$133,000	\$366,000
Design, Development, and Implementation Services and Licenses				\$ 23,497,000	\$56,200,000	\$46,200,000	\$125,897,000
Subtotal - Consulting and Professional Services: External	\$ 384,500	\$2,357,000	\$2,741,500	\$31,033,500	\$67,791,000	\$51,524,000	\$150,348,500

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION E: VENDOR PROJECT BUDGET

Consulting and Professional Services Vendor Budget: SPR #2

Consulting and Professional Services: External (5340580- Consulting and Professional Services - External) (e.g., System Integrator (SI) Vendor, Solution Vendor, IV&V, PM Vendor)	2022/23	2023/24	2024/25	Total Planning Costs	2022/23	2023/24	2024/25*	Project Total
Project Management/Project Executive/Advisor	\$24,440	\$464,956	\$157,595	\$646,990	\$5,740	\$31,956	\$37,392	\$75,088
Quality Assurance/Quality Control	\$ -	\$ -	\$ -	\$ -	\$31,500	\$495,675	\$35,560	\$562,735
Enterprise Architecture	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Governance/Data Governance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Vendor Procurement	\$ -	\$117,304	\$ -	\$117,304	\$ -	\$ -	\$ -	\$ -
Technology Transition Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Consulting Services (IV&V)	\$ -	\$ -	\$ -	\$ -	\$ -	\$41,200	\$141,793	\$182,993
Organizational Change Management	\$ -	\$ -	\$ -	\$ -	\$ -	\$186,444	\$198,289	\$384,732
Customer Experience Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$138,240	\$138,240
Design, Development, and Implementation Services and Licenses	\$ -	\$ -	\$ -	\$ -	\$21,035,58	\$33,447,683	\$ -	\$54,483,264
Subtotal - Consulting and Professional Services: External	\$24,440	\$582,260	\$157,595	\$764,294	\$21,072,82	\$34,202,958	\$551,273	\$55,827,051

*FY 24/25 - Project Management/Project Executive/Advisor and IV&V project costs were extended for the close out period. QA/QC is continued M&O costs. Organization Change Management and Customer Experience Program are allocated costs that were agreed upon for SCP.

**INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION F: RISK ASSESSMENT INFORMATION**

Project #	7100-236
Doc. Type	SPR

2.6 Section F: Risk Assessment Information

	Yes	No
Has a Risk Management Plan been developed for this project?	X	

General Comment(s)

The project team will adhere to the EDDNext Risk & Issues Management plan, which outlines our methodology for managing risks and issues. All identified risks will be thoroughly evaluated, and appropriate responses and mitigation activities will be developed, which will then be integrated into the detailed project plan. This comprehensive plan, EDDNext Risk & Issues Management Plan, covers all aspects of the project, including its deliverables, and provides us with a framework to assess potential risks at every stage. The project team will continuously monitor and evaluate risks and issues throughout the project's life to ensure its success.

3.0 Proposed Project Change

3.1 Project Background/Summary

In 2020, the SCP planning started with the objective to address customer access challenges with the EDD applications and create a single sign-on portal, as well as to improve claimant account management, improve customer experience, and reduce fraud. The Shared Customer Portal went live in June 2023.

In January 2024, a SPR was approved to enhance the Shared Customer Portal with the following objectives:

- 1. Multiple Languages (Shared Customer Portal - LAFLA Settlement Language Enhancements)**
Improving equitable access through implementing six languages in addition to English and Spanish as per the LAFLA settlement.
- 2. Enhanced User Administration**
Enhancing user administration functions for the EDD staff to more effectively provide customer support.
- 3. Claim Intake Navigator**
Implementing intuitive navigation to SCP resources, thereby enhancing customer experience.
- 4. Enhanced Data Analytics and Reporting capabilities**
Enabling EDD staff to improve customer service with further insight into customer analytics through enhanced data reporting and analytics capabilities.

The project team engaged participation from each impacted group in the project's planning and implementation. The impacted groups were identified in the approved Stage 1 Business Analysis.

Of these above objectives, Objective 1 was completed in March 2024. Due to delays in the procurement of DD&I services for the SCP Enhancements project, the project team realized that Objectives 2, 3, and 4 would not be achieved within the anticipated timeframe and that the schedule would overlap with implementation of the ICMS/IDM project. This overlap of the schedule, in turn, would significantly diminish the value of the remaining SCP enhancements to the State, since the outstanding objectives are already covered in the scope of the ICMS/IDM project. Thus, this SPR 2 is being submitted to close the SCP Enhancements project with only Objective 1 delivered.

3.2 Project Status

The SCP Project accomplished the following since the project approval:

Phase	Target Completion Dates	Status
Phase 1		
Project Initiation	9/30/22	Completed
Develop Requirements and Design	1/30/23	Completed
Development and Testing	6/16/23	Completed
MyEDD Go Live	6/26/23	Completed
Phase 2 – SPR #1		
Multiple Languages (Shared Customer Portal - LAFLA Settlement Language Enhancements)	03/28/2024	Completed
Enhanced User Administration	12/09/2024	Not Completed
Claim Intake Navigator	06/30/2025	Not Completed
Enhanced Data Analytics and Reporting capabilities	06/30/2025	Not Completed

Expenditures to Date

Estimated Project Schedule, Cost, and Criticality Rating				Project Number: 7100-236
<u>Project Schedule</u>		<u>Project Costs</u>		<u>Funding Source(s)</u>
Start Date:	07/01/2022 (PDR)	Planning Costs	\$6,544,505.00	Split 50/50 General Fund and Unemployment Compensation Disability Fund
End Date:	06/30/2025	Project Costs	\$85,115,677.57	
Criticality Rating:	Medium	Complexity Zone	II	

Work in Progress

There is no work in progress for SCP.

3.3 Reason for Proposed Change

The key benefit of the SCP enhancements project was the early delivery of benefits and features to EDD customers well ahead of the ICMS/IDM project. However, the procurement for SCP enhancements (covering Objectives 2, 3, and 4) took multiple months longer than planned, pushing the SCP timeline closer to ICMS/IDM award. The schedule would not have delivered SCP Enhancements ahead of the ICMS/IDM project. With the proposed SCP schedule overlapping with ICMS/IDM project timelines, the benefits of early delivery of the SCP enhancements would be diminished.

The project team followed the EDDNext Governance Plan, shared the impact of SCP schedule overlapping with ICMS/IDM project timelines with EDD Leadership, and SCP enhancements contract was cancelled.

Prior to this decision, in order to mitigate the risk of gaps, the EDDNext team did an extensive review of SCP objectives and mapped them to the requirements published in the ICMS/IDM RFP (see Appendix B). ICMS/IDM will fulfill the remaining SCP enhancement objectives.

3.4 Proposed Project Change

In accordance with the State Administrative Manual Section 4819.36 and 4989-4989.3, the EDD is submitting this SPR to CDT to close the Shared Customer Portal Enhancements project with the delivered scope as-is (Objective 1 complete; Objectives 2, 3, and 4 not complete). Maintenance and Operations (M&O) and licensing will continue to ensure that the delivered features are maintained, operational, and available to EDD's customers.

The proposed change will remove requirements related to the remaining three objectives from the SCP workstream, since they will be fulfilled under ICMS/IDM:

- **Enhanced User Administration** - Enhancing user administration functions for the EDD staff to provide customer support more effectively.
- **Claim Intake Navigator** - Implementing intuitive claim navigation, enhancing customer experience.
- **Enhanced Data Analytics and Reporting capabilities** – Providing further insight into the customer experience via additional analytics and data reporting and analytics capabilities.

3.4.1 Accessibility

The proposed change does not have implications for accessibility.

3.4.2 Impact of Proposed Change on the Project

The SCP Enhancements project will be closed, and SCP Enhancements requirements associated with the following objectives will instead be delivered through the ICMS/IDM workstream:

Enhanced User Administration

The project will build enhanced user administration functions into the Portal, replacing the original user administration functionality. This will include the replacement of the BPO Batch Process, CISL Web Services, and the BPO Database. All Admin Utility functions will be part of the enhanced user administration functionality, except Encode/Decode SSN and CA-SIDES Module.

Claim Intake Navigator

The project will create a new intuitive claim intake navigator and provide a user-friendly interface that helps customers decide between the services offered by the EDD and determine their eligibility, then directs the user to the appropriate area of the application. The goals of this objective include the following:

- Develop a visually appealing and easy-to-use interface that enables customers to find relevant information and services efficiently and supports English, Spanish, Simplified Chinese, Traditional Chinese, Vietnamese, Tagalog, Korean, and Armenian.
- Improve the decision-making process by creating a logical and user-friendly flow that guides customers in determining which services they are eligible for, based on their specific circumstances.
- Ensure the claim intake navigator system is flexible, intuitive, accessible, and responsive across different devices and platforms, improving customer satisfaction.
- Replace the large number of dense FAQ webpages and use dynamic sorting to lead customers to the appropriate services.

Enhanced Data Analytics and Reporting Capabilities

The project will design, develop, and implement processes to extract and provide data from Salesforce, Okta, and other web analytics platforms to the EDD data warehouse. As part of the project, we will identify the best

methods to leverage the EDD data warehouse and tools like Tableau to create meaningful reports and dashboards. The project will include data analytics/reporting requirements and design sessions. The project will incorporate statistical tracking, planning, forecasting, and data needed by system administrators, lines of business, investigations, and other stakeholders.

3.4.2.1 Impact on the Scope

The remaining scope of the SCP Enhancements project will be delivered through the ICMS/IDM project. All of the objectives and detailed features are included in the 132 requirements of the ICMS/IDM RFP. Appendix B includes a mapping of the SCP Enhancements objectives to the requirements of the ICMS/IDM RFP.

The SCP Portal was included in the ICMS/IDM RFP as a permissible option for bidders. This meant that the vendors could propose to either use the State's SCP Portal or replace it with their own portal that meets the requirements. This was done after extensive market research, including discussions with all potential vendors before the RFP process was started. EDD also performed an extensive RFI in October 2023 for the ICMS/IDM solution. The information received through this RFI demonstrated that every potential vendor had a version of their own SCP-like portal. The vendors were also willing to work with our portal using interfaces, if required.

Since the SCP Enhancements objectives were included in the ICMS/IDM RFP, it eliminates any element of surprise and increase in scope for potential vendors.

3.4.2.2 Impact on the Schedule

The project schedule variance table below shows the SPR 1 approval for the SCP Phase 2, followed by the variance requested via this SPR 2 with the closure of the SCP Enhancements project:

Project Schedule Variance Table:

	Project Start	Project End	One year M&O Ends
SCP 2 SPR 1	07/01/2022 (PDR)	06/30/2025	06/30/2026
SCP 2 SPR 2	07/01/2022 (PDR)	After approval of SPR 2	One full Fiscal Year after approval of SPR 2

3.4.2.3 Impact on the Cost

A detailed FAW is included with this SPR #2 submission showing the costs and variances involved. The below table shows the major variances between SPR #1 and SPR #2.

SCP Project Cost Variance Table:

Budget Line Item	SCP Enhancements (SPR 1)	SCP Enhancements (SPR 2)	Variance
Planning Costs (One-Time)	\$8,163,926	\$6,544,505	\$1,619,421
Project Costs (One-Time)	\$167,095,316	\$58,978,978*	\$108,116,338
Future Operations IT Staff & OE&E Costs (Continuing)	\$46,956,081	\$44,068,638	\$2,887,444
Total Costs	\$222,215,323	\$109,592,121	\$112,623,203

*This number includes DD&I costs, the Salesforce License cost for one year, and M&O costs for the already deployed solution. Please refer to FAW for details.

Budget Narrative for the change:

In summary, the SCP Enhancements project closure will result in a significant variance in the one-time Project Costs, specifically for DD&I related to the requirements under the remaining three objectives.

3.4.3 Feasible Alternatives Considered

The EDD performed an options analysis to identify the optimal approach for achieving the SCP initiative's vision in the future. Alternative 2 was selected.

Alternative 1 – Continue with SCP Enhancements

1. Deliver better user administration functions to support customer support issues.
2. Deliver key customer experience and a Claim intuitive navigator to EDD services.
3. Deliver enhanced customer insights through improved data reporting and analytics capabilities

DD&I strategy: To continue developing features and enhancing already deployed software.

CDT project approval: Already approved as a reportable project.

Schedule: For the SCP Enhancements project, the SPR will cover two years of DD&I effort and one additional year of M&O. The Shared Customer Portal will adapt to customer needs, application challenges, demand, and state regulations. EDD will follow State IT Project policy to implement any necessary enhancements or mandated changes.

Pros: The SCP workstream continues as approved by the SPR 1.

Cons:

1. Enhancements would not be delivered per original schedule as approved by the SPR 1 for SCP 2, so if the ICMS/IDM vendor recommends replacement of the portal, the benefits will be abbreviated.
2. Potential duplication of portal functionality with the ICMS/IDM project.
3. Duplication of costs between SCP enhancements and ICMS/IDM project.
4. Increased complexity for ICMS/IDM project due to parallel SCP project.

Alternative 2 – Deliver the SCP Enhancements Objectives under the ICMS/IDM workstream**Key features to implement:**

- a. Portal functionality including multiple language access features.
- b. Deliver better user administration functions to support customer support issues.
- c. Deliver key customer experience and an intuitive navigator to EDD services.
- d. Deliver enhanced customer insights through improved data reporting and analytics capabilities

DD&I strategy: The first objective of enhancing the portal with multiple languages has already been achieved. For the remaining SCP objectives, the DD&I strategy will be included in the ICMS/IDM project's DD&I strategy by the winning vendor for that RFP.

CDT project approval: CDT's approval of PAL stages 1, 2, and 3 for the ICMS/IDM project ensures that the scope of the ICMS/IDM project includes the objectives for the SCP Enhancements project.

Schedule: One of the objectives has already been delivered in the year 2023/24. An M&O vendor for the deployed SCP portal functionality has been procured and onboarded. The remaining objectives would be delivered as per the schedule of the ICMS/IDM project.

Pros: This alternative removes the need to run two workstreams in parallel, when the same functionality is available with the new ICMS/IDM solution.

This alternative will avoid the development costs for a separate SCP Enhancements project.

If we have a portal within ICMS, the integration costs and licensing costs will be saved.

Cons: Enhancements may be delivered later than in ICMS/IDM than if performed under SCP enhancements.

Recommended Alternative: EDDNext proposes Alternative 2 as the recommended alternative due to reduced project overhead and having SCP objectives delivered with ICMS/IDM.

3.4.4 Implementation Plan

N/A for SCP since this SPR is requesting project closure.

4.0 Updated Project Management Plan

N/A for SCP since this SPR is requesting project closure.

4.1 Project Manager Qualifications

N/A for SCP since this SPR is requesting project closure.

4.2 Project Management Methodology

N/A for SCP since this SPR is requesting project closure.

4.3 Project Organization

N/A for SCP since this SPR is requesting project closure.

4.4 Project Priorities

N/A for SCP since this SPR is requesting project closure.

4.5 Project Plan

N/A for SCP since this SPR is requesting project closure.

4.5.1 Project Scope

N/A for SCP since this SPR is requesting project closure.

4.5.2 Project Assumptions

The following table provides the basic assumptions and constraints associated with this SPR.

TABLE 7 – ASSUMPTIONS AND CONSTRAINTS

Assumptions
<ul style="list-style-type: none">• SPR 2 approval will be obtained in March 2025, allowing the project to be formally closed.• License procurement(s) will remain outside the scope of the SPR, since the licenses are allowing EDD to support the already deployed SCP.• Current SCP functionality, as deployed, will be supported until the ICMS/IDM project provides a replacement solution that has been tested and approved. A transition will occur at that time.
Constraints
<ul style="list-style-type: none">• None

4.5.3 Project Phasing

N/A for SCP since this SPR is requesting project closure.

4.5.4 Project Roles and Responsibilities

N/A for SCP since this SPR is requesting project closure.

4.5.5 Project Schedule

The SCP project schedule within the EDDNext integrated project plan will be updated to show completed activity and remove the cancelled objectives. An attachment of the relevant sections of the SCP Enhancements project activities is attached with this SPR as appendix C.

4.6 Project Monitoring and Oversight

N/A for SCP since this SPR is requesting project closure.

4.7 Project Quality

N/A for SCP since this SPR is requesting project closure.

4.8 Scope and Change Management

N/A for SCP since this SPR is requesting project closure.

4.9 Authorization Required

N/A for SCP since this SPR is requesting project closure.

5.0 Updated Risk Management Plan

N/A for SCP since this SPR is requesting project closure.

6.0 SCP Enhancements SPR FAW

Refer to F.2-Financial-Analysis-Worksheets.

7.0 APPENDIX

SPR Appendix Attachments

7.1 Appendix A – Acronym List

TABLE 17 – ACRONYM LIST

Acronym	Acronym Name
AB	Assembly Bill
ADA	Americans with Disabilities Act
AIMS	Agency Information Management Strategy
BCP	Budget Change Proposal
CA-PMF	California Project Management Framework
CDT	California Department of Technology
CIO	Chief Information Officer
COVID-19	Coronavirus
CSA	California State Auditor
DD&I	Design Development and Implementation
DI	Disability Insurance
DIB	Disability Insurance Branch
EDD	Employment Development Department
FAW	Financial Analysis Worksheet
IT	Information Technology
ITB	Information Technology Branch
M&O	Maintenance and Operations
PAL	Project Approval Lifecycle
PDR	Project Delegation Request
PFL	Paid Family Leave
PM	Project Manager
PMBOK	Project Management Body of Knowledge
PMI	Project Management Institute
PMM	Project Management Methodology
PMP	PMI Project Management Professional
PSP	Project Summary Package
PY	Personnel Years
S2AA	Stage 2 Alternative Analysis
SAM	State Administrative Manual
SIMM	State Information Management Manual
SCP	Shared Customer Portal
SME	Subject Matter Expert
SPR	Special Project Report
SSN	Social Security Number
SSP	System Security Plan
TRP	Technology Recovery Plan
UI	Unemployment Insurance
UIB	Unemployment Insurance Branch

7.2 Appendix B – Mapping of SCP and ICMS IDM Requirements

See separate file.

7.3 Appendix C – Updated SCP project Schedule

See separate file.