

Attachment E – DOEA eCIRTS ITN Requirements Traceability Verification Matrix Instructions

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SECTION 1 RESPONDENT INSTRUCTIONS

1.1 Overview

The Requirements Traceability Verification Matrix (RTVM) tool is provided to facilitate Respondent Replies to the Business Requirements contained in the State of Florida Department of Elder Affairs (DOEA) Enterprise Client Information and Registration Tracking System (eCIRTS) Project Invitation to Negotiate (ITN). This document includes an overview of RTVM functionality and instructions for replying to the ITN. All Respondent Replies to the Business Requirements referenced within the ITN are required to be submitted using the RTVM. Instructions for how to Reply to all other elements of the ITN can be found within the ITN document.

The RTVM enables Respondents to view, filter, sort, and respond to the Business Requirements contained in the ITN throughout the course of the response period. The RTVM provides Respondents with access to the complete Business Requirements organized in two major sections: **Functional** Business Requirements and **Non-Functional** Business Requirements which is further organized into Categories and Subcategories within those two major sections. Table 1 – Business Requirement Category and Subcategory List provides a listing of the functional and non-functional Categories and Subcategories.

Category and Subcategory Titles	
Category	
Application Functionality	Interfaces and Interoperability
Account Management	Mobility
System Architecture	Public Records
Business Rules Engine	Record Management and Audit
Correspondence & Forms	Reporting & Dashboard
CRM	Search and Navigation
Database Architecture	Security
Development and Support Services	Self Service Portal
Disaster Recovery	Usability
Events and Scheduling	Workflow
Integrated Imaging	
Subcategory	
Assessment	Integrations
Audit History	Medical Case File Review
Care Plans	Mobility
Case Management	Monitoring
Follow-Up	PASRR
GIS	Placement

Category and Subcategory Titles	
Grievance Handling	Staffing
Intake	

Table 1: Business Requirement Category and Subcategory List

1.2 Required Respondent Actions

There are three steps a Respondent must take to complete the RTVM:

1.2.1 Download a Copy of the RTVM

The RTVM Microsoft Excel workbook is one of the files downloaded as part of the ITN Response. If you do not already have a copy, you can download it from the following website: http://www.myflorida.com/apps/vbs/vbs_www.main_menu. The RTVM requires Windows 7 or greater or OS (any version). The RTVM does not run on Mac, unless the Mac user has Windows emulation software installed.

It is the Respondent's responsibility to ensure that a copy of the workbook is obtained in sufficient time to complete all replies to the Business Requirements by the deadline specified in the ITN Section 2.2 – Timeline of Events.

1.2.2 Populate Source Column

The Respondent must populate the Source column with a set of valid values. The source must identify the individual modules or functions within the core software that will be used to satisfy the Business Requirement. In other words, the values provided must include core software module/function specificity in their naming.

The Respondent's source value must align to a standardized Source Category list to enable uniform scoring and analysis. Below is the list of standard Source Categories used by DOEA and their associated definition the Respondent will be asked to crosswalk to its solution specific approach.

Source Category	Definition
Core Software	The desired feature or functionality is provided by the core customer relationship management (CRM) software.
3rd Party App – Fully Integrated	The desired feature or functionality is not available as part of the base CRM software functionality but is a standard feature of third party software proposed to satisfy the specified system requirement and is fully integrated to function as part of the CRM system. The third-party software provides the requested functionality without screen, code, or design changes. The proposed third-party product can satisfy the specification “out-of-the-box” without any modification to the standard baseline software offering. Only use this Source Category if the third-party software fully meets the requirement.
3rd Party App – with Customization Integration	The desired feature or functionality is not available as part of the base CRM software functionality but is a standard feature of third party software proposed to satisfy the specific system requirement. The third-party software provides the requested functionality without screen, code, or design changes, but is not integrated out-of-the-box with the CRM system. Only use this Source Category if the third-party software meets the requirement with no modification to the third-party product. Note: The integration hours are expected to be provided for any specific integration requirements with the rest of the proposed CRM system or other systems.
User Tool	These tools encompass products such as query and report writers that end users can be trained to use in order to satisfy their own needs and requirements.
DBMS/DBA Toolset	These are management tools that are inherent within the database technology proposed by the Respondent, which technical staff can be trained to use in order to maintain or enhance the Respondent’s application. These are not to be considered applications because they do not perform the functions of an application, nor are they considered user or developer tools.
Developer Tool	These tools encompass those application development and maintenance tools that the Department’s technical staff can be trained to use in order to maintain or enhance the Respondent’s application.

Table 2: Source Categories and Definitions

1.3 Responding to Requirements

The user will be presented with columns used to navigate the Categories and Subcategories of the functional and non-functional Business Requirements. A user can select one or more requirements for input, filter and sort the requirements, and any information already input.

The RTVM also presents two very important items:

1. Four response fields – Source Category, Source, Date Avail, and Support - with their respective data entry and drop-down menu options; and
2. The response Narrative field for input of details as required by the DOEA eCIRTS ITN.

The Req ID field displays the number assigned by the State of Florida to the Business Requirement (i.e., 123) and the Req Priority field displays the indicator of the Priority (i.e., Priority 1) assigned. See ITN Section 4.2.3.1.1 – Business Requirements for additional information regarding Business Requirement Priority values.

Four primary fields must be completed by the Respondent for each Business Requirement in the RTVM:

- **Source Category** indicates the type of software tool specified in the corresponding Source column.
- **Source** indicates the specific application, toolset, or third-party component that is proposed to satisfy the requirement.
- **Date Avail** (Date Available) identifies the timeframe in which that support is available and the Phase in which the Respondent proposes to implement the requirement.
- **Support** is used to indicate the capability of the proposed solution(s) to support the requirement.

All Business Requirements in the RTVM must have a response in all four of the above fields in order for the response to that Business Requirement to be considered responsive. While Source Category, Date Avail and Support drop down menus are specified in the RTVM, the Source column value is populated with Respondent-specific module/function, application, toolset, or third-party names as part of the instructions in Section 1.2.2 above. If multiple modules or functions will be used to satisfy a particular Business Requirement, the Respondent must indicate the primary or relevant module/function in the Source field.

When completing the Support field, the Respondent should respond based upon the application, toolset, or third-party component tool identified in the Source field. For example, if the Business Requirement is met through configuration of the application identified in the Source field, the vendor should select “CFG-Basic” or “CFG-Advanced.” The value “CFG-Basic” or “CFG-Advanced” should be selected when the Respondent will meet the Business Requirement without software coding or software modification. The Respondent should select “CUST-Low,” “CUST-Medium,” or “CUST-High” when software coding or software modification would be necessary to meet the requirement.

Respondents must identify any confidential, proprietary, trade secret, or information otherwise not subject to disclosure included within its RTVM response by using the Narrative field within to notate any and all fields deemed confidential for that Business Requirement. The Table below provides instruction for how to format the notation. For information on how to submit a redacted version of the RTVM responses, reference ITN Section 3.5 – Redacted Submission.

While the Respondent’s Reply to the Business Requirements may include Narrative for any individual requirement, please note that the Respondent should provide details using the Narrative field under the following scenarios:

Field	Where Value Is...	Information to Provide in Narrative Field
Support	“CUST-Low”; “CUST-Medium”; or “CUST-High”	Include the corresponding Reference # identified in Section 1.8.3 - Customizations

Field	Where Value Is...	Information to Provide in Narrative Field
		of Attachment D - Technical Reply Instructions
Date Avail	“PH1-Near Term”; “FUTR-Near Term”; “PH1-Long Term”; or “FUTR-Long Term”	Include Release Number, Release Date, and Status
Date Avail	“PH1-Not Planned” or “FUTR-Not Planned”	Include explanation of how the requirement will be met
Source	Other than “Core Software”	Include explanation of how the solution will be accomplished by integration with other Source(s)
Any Field, i.e., Support, Date Avail, Source, and Narrative	Deemed Confidential by Respondent	Include notation within the Narrative field, after any comments or narrative, using the structure below: Support – Confidential Date Avail – Confidential Source – Confidential Narrative – Confidential

Table 3: Instances Requiring Narrative

1.4 Completing the Response in the RTVM

The RTVM must be included in your response to the ITN. After the date and time Replies are due, as noted in ITN Section 2.2 – Timeline of Events, DOEA will no longer accept the Respondent’s RTVM Replies. Replies will be compiled by DOEA and used in the evaluation process.