**Exhibit B – Requirements Matrix**

* + - 1. Government work examples
      2. Platform Requirements
      3. Required Capabilities
      4. Long-term Capabilities
      5. Non-functional Capabilities
      6. Data Requirements

|  |
| --- |
| Vendor Response Codes: |
| E = Extensive Experience (4+ projects) |
| S = Some Experience (1-3 projects) |
| N = No Experience |

1. **Government Work Examples (please describe at least three examples prior government work, including contact information for references)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Past Clients** | **Contact Information** | **Examples of Project Deliverable (Including Link)** | **Comments** |
| *Example 1* |  |  |  |
| *Example 2* |  |  |  |
| *Example 3* |  |  |  |

1. **Platform Requirements (please define your firm’s experience working with the below tools)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirement** | **Vendor Response** | **Examples of Live Projects Using Platforms (Including Link)** | **Comments** |
| 1. D360/Idemia   **Please include any examples of historic integration work with this program and the total number of projects you have completed with integration of this sort**  ***If work involving integration has not been achieved in the past, please provide examples of other government legacy services integration*** |  |  |  |
| 1. FAST   **Please include any examples of historic integration work with this program and the total number of projects you have completed with integration of this sort**  ***If work involving integration has not been achieved in the past, please provide examples of other government legacy services integration*** |  |  |  |
| 1. Adobe AEM Suite |  |  |  |
| 1. SalesForce |  |  |  |
| 1. Microsoft Dynamics 365 |  |  |  |
| 1. Google Cloud Platform: Data warehousing and analytics storage for DPS |  |  |  |
| 1. Azure Active Directory:  Internal staff login B2C identity management used for the external login |  |  |  |
| 1. OnBase Document Management |  |  |  |

1. **Required Capabilities (please include examples of past projects involving similar functionality and any additional context re: expertise)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirement** | **Vendor Response** | **Past Project Examples** | **Comments** |
| **Platform Capabilities** | | | |
| 1. Document Management: A way to manage the documents uploaded by the user and for self    1. Web page to view all their uploaded documents and have a preview of the document    2. Tool to update, edit, and delete the uploaded documents |  |  |  |
| 1. CMS Tools: Help create simple landing pages and forms with a unified user interface.    1. Form Builder       1. Long & Short Answer       2. Radio Buttons       3. Checkbox       4. Dropdown       5. File Upload       6. Embed Code       7. Description Area       8. Form Input Rule Logic    2. Landing/Web Page Builder       1. Here’s an example of the design we’re looking for - <https://service.ok.gov/patient-form> (can we achieve this design with your off the shelf CMS tools?) |  |  |  |
| 1. Signature: Legally binding electronic signature which can be included as part of the CMS tools |  |  |  |
| 1. Contact Management: Easily store and find contact information, such as names, addresses, and telephone numbers    1. Should be able to connect to Notifications Manager to send automated notifications and alerts as necessary |  |  |  |
| 1. Notifications Management: ensure accurate delivery of important information to the right person at the right time    1. Email    2. Calls/Text Messages    3. Time and workflow triggered notification/alert    4. Manually triggered notification/alert |  |  |  |
| 1. Support Management: Manage support tickets, email, SMS, chat, and all communication in one collaborative platform    1. Phone Calls    2. Emails    3. Contact Form    4. Submitting an issue ticket |  |  |  |
| 1. Business Rules: Describe the operations, definitions and constraints for the organization |  |  |  |
| 1. Workflow and Approvals: Setting up the process for the application submission process and allowing administrator to approve or reject the application |  |  |  |
| **Required capabilities via integration** | | | |
| 1. Document Verification: Automated way to verify that the documents are what they claim to be e.g. birth certificate   Via integration (please flag any vendor preferences) |  |  |  |
| 1. Payment Management: Centralized payment system to process, track and handle administrative tasks e.g. Stripe    1. Billing    2. Payments    3. Accounting    4. Compliance and Financial Analysis   Via integration (please flag any vendor preferences) |  |  |  |

1. **Long-term Capabilities (please include examples of past projects involving similar functionality and any additional context re: expertise)**

|  |  |  |
| --- | --- | --- |
| **Long-term Capabilities** | | |
| **Requirement** | **Vendor Response** | **Comments** |
| 1. Customer 360 view:    1. With all the data uploaded from the customer to be able to see the applications, documents and data on a single page       1. Ex: User has an application in progress, with address history changes |  |  |
| 1. Application Management:    1. Being able to view, filter, and sort applications in one location    2. Applications can be assigned to the back-office staff to handle the next steps in the process    3. History of the submitted applications |  |  |
| 1. Lead Management:    1. Identify customers that may be interested in SOK services |  |  |
| 1. Opportunity Management    1. Identify the customers whose need can potentially be pushed into cross services |  |  |

1. **Non-Functional Capabilities (please include examples of past projects involving similar functionality and any additional context re: expertise))**

|  |  |  |
| --- | --- | --- |
| **Non-Functional Capabilities** | | |
| **Requirement** | **Vendor Response** | **Comments** |
| 1. Software Training and Documentation    1. Documentation provided to the Administrators |  |  |
| 1. Digital Platform development    1. Ongoing customizations    2. Tracking system for bugs, custom feature requests |  |  |
| 1. Operational Support and Monitoring |  |  |
| 1. Security and Compliance |  |  |
| 1. DevSec Ops |  |  |

1. **Data Requirements**

|  |  |  |
| --- | --- | --- |
| **Requirement** | **Requirement Met? (Yes/No)** | **Describe Level and Examples** |
| 1. Data Location: Data must be stored in the US |  |  |
| 1. Data ownership: Software solutions cannot own the data |  |  |
| 1. Data Access: Must have access to the data and be able to export it |  |  |
| 1. Monitoring the platform: Must have higher-level access to monitor the platform and data manipulation |  |  |
| 1. Identity: Must have a Business to Consumer identity management    1. Azure Active Directory is preferred for internal staff |  |  |
| 1. FedRamp PI Compliance: government-wide program that provides a standardized approach to security assessment, authorization, and continuous monitoring for cloud products and services |  |  |