

# REQUIREMENTS CROSS-REFERENCE MATRIX

Attachment J

Proposal Submission Requirements			Requirement Met (Y/N)	Contractor Response			For Consortium Use Only	
REQ#	Category	Requirement		Contractor Comment	Page #	Section #	REQ Met	Reviewer Comment
PS 1	Proposal Content	Proposals must be received by the designated date and time. Late or incomplete proposals will not be accepted. Proposals must be delivered via regular mail, expedited delivery such as Federal Express, messenger/courier service, or hand-delivered by a Contractor representative. Proposal submissions must be sent to the RFP/Proposal contact as defined in Section 6.2.	Y	<b>Deloitte Digital meets this requirement</b> by submitting our proposal by the designated due date and time. Our proposal is hand-delivered to the RFP/Proposal contact as defined in Section 6.2.	N/A	N/A		
PS 2	Proposal Content	The Contractor must submit the proposal in two separate volumes, separately packaged and clearly labeled according to the following categories: a) Volume 1 – Transmittal Letter and Business Proposal b) Volume 2 – Price Proposal	Y	<b>Deloitte Digital meets this requirement</b> by submitting our proposal in two separate volumes, separately packaged and clearly labeled according to the following categories: a) Volume 1 – Transmittal Letter and Business Proposal b) Volume 2 – Price Proposal	N/A	N/A		
PS 3	Proposal Content	The Contractor must submit Volume 1, Transmittal Letter & Business Proposal: a) One (1) Hardcopy signed original b) Ten (10) electronic copy flash drives	Y	<b>Deloitte Digital meets this requirement</b> by submitting the following items for Volume 1, Transmittal Letter & Business Proposal: a) One (1) Hardcopy signed original b) Ten (10) electronic copy flash drives	N/A	N/A		
PS 4	Proposal Content	The Contractor must submit Volume 2, Price Proposal: a) One (1) hardcopy signed original b) Five (5) electronic copy flash drives	Y	<b>Deloitte Digital meets this requirement</b> by submitting the following items for Volume 2, Price Proposal: a) One (1) hardcopy signed original b) Five (5) electronic copy flash drives	N/A	N/A		
PS 5	Proposal Content	Proposals shall be on 8½ x 11-inch pages, except for charts, diagrams, Microsoft Excel spreadsheets, which may be on an 8½ x 14-inch pages. The text font must be 11-point Century Gothic. In tables, 10-point or 11-point font size may be used.	Y	<b>Deloitte Digital meets this requirement</b> by submitting our proposal on 8½ x 11-inch pages, using text font 11-point Century Gothic, and in tables, 10-point or 11-point font size.	All	All		
PS 6	Proposal Content	The Proposal shall be organized into numbered sections and subsections using a decimal numbering system. The pages within each section shall be sequentially numbered.	Y	<b>Deloitte Digital meets this requirement</b> by organizing our proposal into numbered sections and subsections using a decimal numbering system. Also, the pages within each section are sequentially numbered.	All	All		
PS 7	Proposal Content	Figures and tables should be assigned index numbers and should be referenced by these numbers in the proposal text and in the proposal Table of Contents. Figures and tables should be placed as close to text references as possible.	Y	<b>Deloitte Digital meets this requirement</b> by assigning figures and tables index numbers with each of them referenced by these numbers in the proposal text and in the proposal Table of Contents. In addition, figures and tables are placed as close to text references as possible.	All	All		
PS 8	Proposal Content	Proposals shall be clearly written in the English language.	Y	<b>Deloitte Digital meets this requirement</b> by providing our proposal in clearly written English language.	All	All		
PS 9	Proposal Content	Electronic copies must be submitted using the Microsoft Office Suite. PDF format is acceptable for financial statements and other firm-related financial information. The Contractor may provide a link to its financial statements in lieu of PDF or Microsoft Office formats. It is solely the responsibility of the Contractor to ensure the link is correct.	Y	<b>Deloitte Digital meets this requirement</b> by submitting electronic copies using the Microsoft Office Suite.	N/A	N/A		
PS 10	Proposal Content	Volume 1 and Volume 2 must be submitted on separate flash drives and in clearly labeled packages to the RFP Contact identified in Section 1.8. The electronic proposals shall not be password protected.	Y	<b>Deloitte Digital meets this requirement</b> by submitting Volume 1 and Volume 2 on separate flash drives and in clearly labeled packages to the RFP Contact identified in Section 1.8. The electronic proposals are not password protected.	N/A	N/A		

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PS 11	Proposal Content	The appropriate Proposal volumes shall contain the following: a) Volume 1 – Transmittal Letter and Business Proposal: •Cover Page •Transmittal Letter •Table of Contents •Executive Summary •Firm Qualifications •Portal/Mobile App Services Approach •Portal/Mobile App Solution •Staffing Qualifications •Required Attachments b) Volume 2 – Price Proposal; •Cover Page •Table of Contents •Cost Schedules (Attachment A – Price Proposal Schedules)	Y	<b>Deloitte Digital meets this requirement</b> by submitting the appropriate Proposal volumes with the following: a) Volume 1 – Transmittal Letter and Business Proposal: •Cover Page •Transmittal Letter •Table of Contents •Executive Summary •Firm Qualifications •Portal/Mobile App Services Approach •Portal/Mobile App Solution •Staffing Qualifications •Required Attachments b) Volume 2 – Price Proposal; •Cover Page •Table of Contents •Cost Schedules (Attachment A – Price Proposal Schedules)	N/A	N/A		
PS 12	Proposal Content	The Proposal shall contain a transmittal letter and shall include the following: a) The Contractor's business name and address b) The Contractor's legal entity, such as: corporation, partnership or other entity c) The Contractor's legal entity, such as: corporation, partnership or other entity d) The Contractor's Primary Business Contact including name, title, phone number and email e) a statement certifying that neither the organization, proposed subcontractor organizations, nor any of their principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal, State or County department or agency f) a statement certifying that neither the organization, proposed subcontractor organizations, nor any of their principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal, State or County department or agency g) a reference to all RFP amendments received by the Contractor; if none has been received, a statement to that effect must be included h) a statement indicating whether the Contractor has had any contracts terminated within the last five years. If any such terminations exist, the Contractor must include details regarding the contract, the reason for termination, date of termination, and client contact information i) a statement indicating whether the Contractor is or has been involved in litigation regarding any contracts to which the Contractor is a party, within the previous five years. If any such litigation exists, the Contractor must include details regarding the contract, the reason for litigation, date of litigation, and client contact information j) a statement certifying that the Contractor's Proposal as submitted will remain in full force and effect for a specified period of time, which must be at least 9 months from the Proposal due date specified in Section 1 or through the end of contract negotiations whichever is later.	Y	<b>Deloitte Digital meets this requirement</b> by addressing each of the requirements in the transmittal letter and in the required format.	1-3	1		
PS 13	Proposal Content	The Transmittal Letter shall be signed by an officer or agent of the Contractor's organization who is authorized to negotiate on behalf of the Contractor and commit the organization to the terms and conditions of the Agreement resulting from this procurement. The Contractor shall include the job title of the individual who signs the letter.	Y	<b>Deloitte Digital meets this requirement</b> by submitting the Transmittal Letter signed by an officer or agent of the Contractor's organization who is authorized to negotiate on behalf of the Contractor and commit the organization to the terms and conditions of the Agreement resulting from this procurement. This includes the job title of the individual who signed the letter.	1-5	1		
PS 14	Proposal Content	Price information must not be included in the transmittal letter.	Y	<b>Deloitte Digital meets this requirement</b> by not including any price information in the Transmittal Letter.	1-6	1		
PS 15	Proposal Content	The Proposal must contain a table of contents which shows how the entire Business Proposal is organized and presented using a numeric outline format to the fourth level.	Y	<b>Deloitte Digital meets this requirement</b> by providing a table of contents which shows how the entire Business Proposal is organized and presented using a numeric outline format to the fourth level.	2-1	2		
PS 16	Proposal Content	The Executive Summary shall condense and highlight the contents of the Business Proposal in such a way as to provide a broad understanding of the Business Proposal. The primary objective of this summary is to provide an overview of the key points in the Proposal. While no specific format need be followed, it should include salient and significant points and minimize highly technical terms. It should be brief and concise, not to exceed ten (10) pages.	Y	<b>Deloitte Digital meets this requirement</b> by providing the condensed Executive Summary highlighting the contents of the Business Proposal in such a way as to provide a broad understanding of the Business Proposal. This includes our proposal key points using salient and significant points while minimizing technical terms. The Executive Summary does not exceed ten (10) pages.	3-1	3		
PS 17	Proposal Content	The Executive Summary must not contain price information.	Y	<b>Deloitte Digital meets this requirement</b> by not including any price information in the Executive Summary.	3-1	3		

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FM 1	Firm	The Firm Qualifications sub-section shall include the Attachment E – Firm Qualifications and additional information that provides the Consortium with a basis for determining Contractor and subcontractor financial, project management, and technical capabilities to undertake a project of this size and complexity. A concise but thorough description of relevant experience is desired.	Y	<b>Deloitte Digital meets this requirement</b> by providing our completed Attachment E - Firm Qualifications which summarizes our qualifications.  <b>Deloitte Digital exceeds this requirement</b> by having successfully delivered 25 Portal/Mobile applications to support Medicaid, SNAP, TANF, and misc. social services programs—more than any other vendor—including both the first Java and .NET self-service portals in the early 2000s and the first mobile application (Colorado PEAK).	4-37  E-1	4.2.2.1  Section 8, Attachment E – Firm Qualifications		
FM 2	Firm	The Contractor and subcontractor(s) information shall be shown separately. The Contractor and each subcontractor shall provide the requested firm/project details within Attachment E – Firm Qualifications Table 2. In the information provided for each subcontractor, the Contractor shall state the business relationship of the subcontractor to the Contractor.	Y	<b>Deloitte Digital meets this requirement</b> by providing qualifications to meet the mandatory MQs for experience as well as sharing our experience across HHS, Java, Mobile, AWS and portals. We have not used any subcontractors as part of our response.	4-37  E-1	4.2.2.1  Section 8, Attachment E – Firm Qualifications		
FM 3	Firm	The Contractor and subcontractor(s) shall each provide three references within Attachment F – Firm References format. Each reference must clearly indicate the reference entity.	Y	<b>Deloitte Digital meets this requirement</b> by providing our completed Attachment F - Firm References.	4-37  F-1	4.2.2.2  Section 8, Attachment F – Firm References		
FM 4	Firm	The Contractor shall provide a firm organization chart. If the firm is a subsidiary of a parent company, the organization chart must be that of the subsidiary firm. The chart must display the firm's structure and the organizational placement of the oversight for the Portal/Mobile App Project. The organization chart must include names and be dated.	Y	<b>Deloitte Digital meets this requirement</b> by providing a firm organization chart which displays the firm's structure and the organizational placement of the oversight for the Portal/Mobile App Project. The organization chart includes names and is dated.	4-3	4.1.1		
FM 7	Firm	The Contractor shall provide a copy of its Dun & Bradstreet (D&B) D-U-N-S number and Business Information Report, inclusive of its D&B viability and credit ratings.	Y	<b>Deloitte Digital meets this requirement</b> by providing a copy of its Dun & Bradstreet (D&B) Business Information Report, inclusive of its D&B viability and credit ratings. We have provided the copy in Appendix 4A and the end Section 4.	4-7  4-38	4.1.3  Appendix 4A		
FM 8	Firm	These financial statements shall be accompanied by a signed statement from the Contractor's or its Parent Company's Chief Executive Officer, Chief Financial Officer or Designee(s), certifying the financial information is accurate and complete.	Y	<b>Deloitte Digital meets this requirement</b> by providing a signed statement certifying the financial information is accurate and complete.	4-7	4.1.4		
FM 9	Firm	The Contractor shall provide a description of any formal relationships with the Consortium or California Counties over the last twenty-four (24) months.	Y	<b>Deloitte Digital meets this requirement</b> by providing a description of formal relationships with the Consortium or California Counties over the last twenty-four (24) months.	4-10	4.1.5		
FM 10	Firm	The Contractor shall provide a description of how the Contractor will address any potential conflicts between the work underway on current contracts and the Portal/Mobile App Project.	Y	<b>Deloitte Digital meets this requirement</b> by providing a description of how Deloitte will address any potential conflicts between the work underway on current contracts and the Portal/Mobile App Project.	4-12	4.1.6		
FM 12	Firm	The Contractor shall include details of firm experience for both the Prime Portal/Mobile App Contractor and all subcontractors relevant to the proposed Portal/Mobile App Services. A list of all Portal/Mobile App Services projects for both the Prime Portal/Mobile App Contractor and all subcontractors shall be provided within the form in Attachment E – Firm Qualifications.	Y	<b>Deloitte Digital meets this requirement</b> by providing details of our firm's experience using Attachment E - Firm Qualifications as a Prime Contractor delivering Portal/Mobile Apps relevant to the proposed Portal/Mobile App Services. We are not utilizing subcontractors for this bid.  <b>Deloitte Digital exceeds this requirement</b> by having successfully delivered 25 Portal/Mobile applications to support Medicaid, SNAP, and TANF—more than any other vendor—including both the first Java and .NET self-service portals in the early 2000s and the first mobile application (Colorado PEAK).	4-16 4-37 E-1	4.2.2.1  Section 8, Attachment E – Firm Qualifications		

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FM 13	Firm	The Contractor shall also provide a general narrative description highlighting the Contractor's Portal/Mobile App Services experience and capabilities as prime Contractor, subcontractor or other role including the following areas: - Proven experience in providing similar services for similar projects, e.g., web, portal and mobile applications for large-scale or statewide Health and Human Services systems.	Y	<b>Deloitte Digital meets this requirement</b> by providing a detailed narrative description of our Portal/Mobile Apps experience and capabilities as a Prime vendor. As noted in our narrative response, we have delivered 47 portal or mobile applications that connect to large scale, statewide Health and Human Services systems (e.g., Medicaid/SNAP eligibility systems, child welfare systems, unemployment insurance systems, child support enforcement systems), including 25 statewide systems specifically for Medicaid, SNAP, and TANF.	4-14	4.2.1		
FM 14	Firm	The Contractor shall supply any additional information not already presented under Section 6.2.3.4.1 Details of Firm Qualifications and Financial Resources, which the Contractor believes to be relevant to the Consortium's assessment of the Contractor's and subcontractor's experience with regard to the specifics of this RFP.	Y	<b>Deloitte Digital meets this requirement</b> by providing details of additional leading capabilities that are relevant to the success of this project as outlined in Section 4.2.1.7 - Other Key Qualifications That Drive Our Success.	4-33	4.2.1.7		
		The following requirements may or may not be applicable to all vendors. Complete if applicable. Mark N/A if not applicable.						
FM 5	Firm	The Contractor shall provide financial statements for the past two (2) fiscal years shall be provided for the Contractor and each Subcontractor. These must be audited financial statements unless audited statements are not a part of the routine business practices of the firm. The Consortium will accept financial statements audited according to either Generally Accepted Accounting Principles (GAAP), Statutory Accounting Principles (SAP) of the National Association of Insurance Commissioners (NAIC) or the International Financial Reporting Standards (IFRS).	N/A	<b>Not applicable</b> as Deloitte Digital does not produce audited financial statements and has provided unaudited financial information per the option of Requirement FM 6 below.	N/A	N/A		
FM 6	Firm	If the Contractor does not produce audited financial statements or file corporate financial information such as a 10-K as part of its routine business practices, Contractors shall provide unaudited financial information that includes information relating to liquidity, assets, liabilities, equity, working capital, current ratio and net revenue. Contractors must also provide a privately placed debt rating from the NAIC, or an equivalent nationally recognized credit rating agency.	Y	<b>Deloitte Digital meets this requirement</b> by providing unaudited financial information to enable the Evaluation Committee to assess our financial stability. Deloitte's privately placed debt carries the National Association of Insurance Commissioners' (NAIC) highest designation of 1, which is comparable to an A or better rating from one of the nationally recognized rating agencies. Deloitte is the largest private professional services provider in the United States.	4-5	4.1.2		
FM 11	Firm	For any proposed subcontractors, items contained in this section 6.2.3.4.1 must also be completed.	N/A	<b>Not applicable</b> as Deloitte Digital is not proposing any subcontractors; details are not provided.	N/A	N/A		
FM 15	Firm	The Contractor shall provide a detailed description of all work to be performed by the subcontractor(s) including: a) Any tasks, or portions thereof, that will be subcontracted must be identified and defined. b) Each subcontractor(s) responsible shall be identified by name. c) The rationale for selection of the subcontractor(s) must be stated. d) The exact type and amount of work to be done by each subcontractor must be identified and defined.	N/A	<b>Not applicable</b> as Deloitte Digital is not proposing any subcontractors; details are not provided.	N/A	N/A		
FM 16	Firm	The Contractor shall delineate the percentage of the total Portal/Mobile App Project work the subcontractor will perform by State Fiscal Year. The percentage of work shall be calculated using the subcontractor's portion of the total number of work hours.	N/A	<b>Not applicable</b> as Deloitte Digital is not proposing any subcontractors; details are not provided.	N/A	N/A		

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Approach SOW & Deliverables			Requirement Met (Y/N)	Contractor Response			For Consortium Use Only	
REQ#	Category	Requirements			Page #	Section #	REQ Met	Reviewer Comment
AP 1	Approach	The Contractor shall provide a detailed description of all work to be performed in the following areas to satisfy or exceed the RFP requirements as described in Section 4. Statement of Work and Attachment J – Statewide Portal/Mobile App Requirements Cross-Reference Matrix. a) Project Management b) Each element of the Portal/Mobile App Approach must include concise and informative descriptions of the required Statement of Work activities, related to: - Deliverable development, - Proposed approach to user engagement and UCD, and - Key interaction with Consortium, state, county, advocate, client and other Contractor staff.	Y	<b>Deloitte Digital meets this requirement</b> by providing a Portal/Mobile App approach that meets the Consortium's objectives and supports its timeline. Our approach supports the expedited completion of the phases by leveraging our processes and tools, which consistently allow us to deliver successful, user-centered design solutions for government clients. Our Project Management strategy is aligned with the CalSAWS Consortium standards, and key industry standards like CMMI and PMBOK. Our SOW activities adopt a UCD approach that helps make our systems and products more responsive to the people, or the customers, who use them. We not only plan and manage the stakeholder engagement, but also monitor it. We consider it to be a key for successful implementation.  <b>Deloitte Digital exceeds this requirement</b> by detailing an approach that delivers a user-centric system by using our Elevate the Human eXperience (#EHX) Method. #EHX, rooted in UCD, focuses on tailored solutions that are desirable to users, viable, and organizationally feasible. It incorporates UCD's co-creation and collaboration methods. For all phases of #EHX, we use user research pre-work, both nationally and in California, that accelerates our insights and helps us deliver a Portal/Mobile App that better fits Californians' needs. We also use existing deliverable templates from the Consortium to jump-start development of project deliverables.	5-6	5		
AP 2	Approach	The Contractor shall provide a detailed description of how the proposed Portal/Mobile Solution supports the Consortium, demonstrating how the Solution will enable the Consortium to achieve the goals and objectives defined for the Statewide Portal/Mobile App Project.	Y	<b>Deloitte Digital meets the requirement</b> by using the #EHX method for system delivery. Our method encompasses all the aspects of designing and delivering large complex systems like the Portal/Mobile App in an expedient manner while enabling maximum end-user and stakeholder engagement. Our approach aligns very closely with the Consortium's delivery expectations and includes tested and refined processes, standards, and accelerators from 25 other successful self-service systems implementations. This enables us to prepare a realistic plan and meet the 14-month Phase 1 project timeline. Lastly, throughout our Solution response, we use "meeting objectives" icons to indicate that our Solution meets your project's overall goals and objectives.	5-6, 5-8 6-23	5 6		
AP 3	Approach	The Solution should clearly demonstrate and prioritize an understanding of end-user and stakeholder needs, including accessibility, a user-friendly interface, and simple and clear language.	Y	<b>Deloitte Digital meets the requirement</b> by using our UCD-based #EHX method, which engages the breadth and diversity of Californians and keeping the clients at the center of our efforts. Our approach enables us to collect client feedback through research, including interviews, observations, focus groups, and surveys, allowing us to understand end-user and stakeholder needs and allowing us to build a best-in-class Portal/Mobile App with simple and clear language and a user-friendly interface.,  <b>Deloitte Digital exceeds this requirement</b> by actively engaging the diverse user populations beyond just the requirements phase, but through discovery, define, and testing. This includes using end-user stakeholders in the evaluation of design prototypes, usability of form factors, and language translations. We also leverage our "Universal Needs" gathered both nationally and in California to guide simple, clear, and intuitive interfaces.	5-53, 5-61	5.2.2		
AP 4	Approach	The Contractor shall provide a detailed description of the proposed Portal/Mobile Solution demonstrating how the proposed Portal/Mobile Solution meets exceeds each requirement within Attachment J - Statewide Portal/Mobile App Requirements Cross-Reference Matrix.	Y	<b>Deloitte Digital meets the requirement</b> by detailing in Section 6 all the features and functions of our Portal/Mobile App solution accelerator and how it implements Attachment J-specified features.	6-25	6.1		
AP 5	Approach	The Portal/Mobile App Contractor shall be responsible for performing activities required to design, develop, and implement the Portal/Mobile infrastructure and application solution. All Portal/Mobile App development must adhere to current program policy.	Y	<b>Deloitte Digital meets this requirement</b> by leveraging our UCD-based #EHX system delivery method, which includes tested and refined processes, standards, and accelerators from thousands of Deloitte Digital's successful projects. Our #EHX method aligns very closely with the Consortium's delivery expectations, phases, and tasks outlined within the RFP. Our UCD-based design enables the solution to evolve with maximum client engagement along with adherence to program policy. Our approach actively engages the diverse user populations not just in the requirements phase, but also through discovery, define, and testing. This includes using end-user stakeholders in the evaluation of design prototypes, usability of form factors and language translations. We have extensive experience collaborating with other CalSAWS DD&I vendors, and we will leverage that experience as well as lessons learned to provide a streamlined transition to the new Portal/Mobile App.	5-46 5-72 5-98	5.2.1 5.2.4 5.5		

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Approach SOW & Deliverables			Contractor Response				For Consortium Use Only	
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AP 6	Approach	The Contractor shall perform Project tasks and provide respective Deliverables as part of three phases: a) Phase 1 – Design, Development and Implementation (DD&I) Phase b) Phase 2 - Optional Enhancements c) Phase 3 - Maintenance and Operations.	Y	<b>Deloitte Digital meets the requirement</b> by creating a realistic and achievable work plan that carefully manages the dependencies, deliverables, and milestones while minimizing risks. Our work plan is built as a deliverable-based plan and includes activities, tasks, and their dependencies, WBS, and project milestones. In all the phases, our PMO will track the status of each deliverable and a summary of all deliverables, and their status will be published in our monthly report to the Consortium. The list of deliverables and their submission timeline for the Portal/Mobile App implementation is noted in Section 5.1.4.	5-35 5-37 5-43 5-50 5-64, 5-67, 5-69 5-85 5-106 5-110 5-113	5.1.3 5.1.4 5.1.5 5.2.1 5.2.3 5.4.1 5.5.3 5.6 5.7		
AP 7	Approach	Contractors shall propose a schedule and work plan for Phase 1. Phase 1 must be completed within fourteen (14) months inclusive of all defined Phase 1 tasks, Deliverables and milestones.	Y	<b>Deloitte Digital meets this requirement</b> by providing a detailed MS Project Schedule containing the Phase 1 tasks, deliverables, and milestones as Appendix 5A of our response. A summary level of the view of the schedule is in Section 5 and the Executive Summary.  <b>Our Portal/Mobile solution exceeds this requirement</b> by providing the detailed work plan with initial staffing and effort required to complete all of Phase 1 within the 14-month completion deadline. Per your response to question id #98 posted on 12/13/2019, Portal/Mobile Implementation completion report and Final Acceptance is not part of the 14-month timeframe. Our work-plan aligns with this. Our Portal/Mobile App solution has provided detailed tasks, Deliverable and milestones for optional Phase 2- Optional Enhancements implementations during Phase 1, as well as Phase	5-10 5-34 5-129	5 5.1.3 Appendix 5A		
AP 8	Approach	The Contractor shall determine and indicate the extent to which Phase 2 Optional Enhancements can be completed within the Phase 1 timeframe. The Contractor shall determine and indicate a release date for all Phase 2 Optional Enhancements as part of the completion of the Attachment A – Price Proposal Schedules.	Y	<b>Deloitte Digital meets this requirement</b> by coming prepared with a draft release plan for all the Phase 2 requirements.  <b>Deloitte Digital exceeds this requirement</b> by delivering seven (7) Phase 2 requirements as part of Phase 1, without compromising on the timeliness of Phase 1 delivery. This is possible as some of the Phase 2 requirements are related to Phase 1 and, when delivered together, will save Deloitte Digital and the Consortium effort across all SDLC phases. Other remaining requirements are categorized and grouped together based on requirements that save effort, achieve efficiency, and reduce risk when delivered together. Based on the grouping, we are recommending two releases	5-113	5.7		
AP 9	Approach	The Contractor shall design, develop and implement Phase 2 enhancements as directed by the Consortium.	Y	<b>Deloitte Digital meets this requirement</b> by collaborating with the Consortium to design, develop, and implement Phase 2 enhancements as directed by the Consortium per the timeline detailed in Section 5.7 of our response. We align ourselves with your objectives and complement and enhance your project processes and methods to achieve your vision. We will deliver Phase 2 optional enhancements utilizing our #EHX method using the same set of assets, tools, and accelerators as in Phase 1.  <b>Deloitte exceeds this requirement</b> by delivering seven (7) of your Phase 2	5-113	5.7		
AP 10	Approach	The Contractor shall implement the Portal/Mobile App in a single cut-over event during September 2021, in accordance with the approved CalSAWS Roadmap, Figure 3.	Y	<b>Deloitte Digital meets these requirements</b> by providing a thorough cut-over plan that includes execution of testing activities to uncover areas of concern, perform self-assessments, and conduct performance testing in anticipation of the September 2021 cut-over. Mock go-lives, health checks, site certification, and a Go/No-Go Checklist are activities that will help lead to a successful single cut-over event across all California's regions and Counties.	5-98 5-103	5.5 5.5.3		

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GS 1	Project Management	The Contractor is responsible for staffing and managing the tasks associated with each of the following project management areas. The Contractor shall involve stakeholders, advocates and clients in User Centered Design activities during requirements confirmation, design and UAT processes to elicit appropriate input.	Y	<p><b>Deloitte Digital meets this requirement</b> by collaborating with the Consortium to execute a holistic methodology for project oversight and execution. The Consortium's project management approach (documented in PCD) and our #EHX System delivery method fully align. We bring leading technical tools and skilled staff, enabling our joint team to produce a stable, sustainable system while reducing project risks that affect budget, schedule, and performance. Our team works side by side with the Consortium's Project team from Day One to identify the stakeholders impacted by the CalSAWS Portal/Mobile App implementation, manage their expectations, establish a clear communication channel, and involve them in key decisions in the project. Our UCD-based #EHX approach enables the solution to evolve with maximum client and stakeholder engagement with adherence to pre-defined timelines to deliver the highest value in the shortest amount of time.</p> <p><b>Deloitte Digital exceeds this requirement</b> by combining our UCD based #EHX methodology with Deloitte Digital's experience of realistic estimating and staffing system projects, our project management method reduces project risk and positions our joint team for success.</p>	5-16 5-29	5.1.1 5.1.2		
GS 2	Project Management	The Contractor shall perform project management tasks including communication management, issue and risk management, scope management, DED and deliverable management and contract management. These key project management activities will be performed in accordance with existing CalSAWS project management processes and standards, contained in the Procurement Library.	Y	<p><b>Deloitte Digital meets this requirement</b> by aligning to existing CalSAWS project management processes and standards (detailed in the PCD). Deloitte Digital understands the Consortium's expectations and requirements around deliverables and project transparency. We recognize the need for structured governance, scope management, effective communications, DED/Deliverable management, efficient issue and risk management, and contract management. To enable facilitation of these necessary PM tasks and activities, our #EHX method provides the necessary know-how, tools, assets, and accelerators. Leveraging our skilled staff, we can successfully implement our Portal/Mobile App solution.</p> <p><b>Our Portal/Mobile solution exceeds this requirement</b> by leveraging #EHX Method which offers enhanced capabilities to monitor compliance, forecast project needs, and track program outcomes to measure overall project health and success.</p>	5-13 5-18 5-20, 5-24, 5-27, 5-28, 5-29 5-37	5.1 5.1.1 5.1.2 5.1.4		
GS 3	Project Management	The Contractor shall manage, and control the delivery of the Portal/Mobile App Software, and deployment support.	Y	<b>Deloitte Digital meets this requirement</b> by using our #EHX methodology paired with CalSAWS Consortium's PCD to plan the processes and checkpoints to keep CalSAWS Portal/ Mobile Application implementation, and related software deployments, on track. This enables our joint team to produce a stable, sustainable system while reducing project risks that affect budget, schedule, and performance.	5-20, 5-30	5.1.2		
GS 4	Project Management	The Contractor shall establish and maintain the work plan, inclusive of tasks, milestones, deliverables and resources required to plan and execute the required scope of work.	Y	<p><b>Deloitte Digital meets this requirement</b> by using an approach that has both parallel and sequential work streams. In MS Project, we construct a deliverable based work plan where every task has a clearly defined start date, end date, duration and the dependent tasks that need to be completed. These tasks have a specific set of resources assigned to confirm accountability of the task. Additionally, each milestone in the work plan is dependent on a set of tasks that are critical for its completion. Dependency on a task is identified by using one or more predecessors or successors, as applicable.</p> <p>We then sequences, schedules, executes, and monitors activities with a focus on efficiencies that can be achieved to meet CalSAWS Portal/ Mobile App timelines.</p>	5-34, 5-35	5.1.3		
GS 5	Project Management	The Contractor shall prepare and submit Deliverable Expectations Documents (DEDs) for all required Deliverables. It is important to note that user satisfaction will be a key factor in achieving acceptance of the UCD-based Application Design Deliverable and as part of the UAT exit criteria (as a precursor to Go-Live). As part of DED development and acceptance, the user satisfaction criteria will be defined in measurable, quantifiable terms.	Y	<b>Deloitte Digital meets this requirement</b> by using Consortium templates to develop DEDs and deliverables. For new deliverable development we will leverage DED and Deliverable templates from our #EHX method. Our approach sets a cadence for deliverable review and acceptances that holds both Deloitte Digital and the Consortium accountable for completing and approving DEDs and deliverables in a timely manner. This not only reduces effort during the Consortium's delivery review process, but also promotes quality from the get-go, resulting in fewer burdens on the Consortium and timely, low-risk reviews. Understanding how a change impacts user experience and satisfaction is a hallmark of our UCD method. We will identify specific measures of user experience and satisfaction and incorporate them into our DED	5-37 5-86	5.1.4 5.4.1		

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GS 6	Project Management	The Contractor shall coordinate and work cooperatively with the CalSAWS DD&I Contractor project team and other Contractors (such as Quality Assurance and IV&V).	Y	<p><b>Deloitte Digital meets this requirement</b> by aligning with the Consortium PCD and incorporating our #EHX method. Deloitte will plan and manage inclusion of all stakeholders, including the current DD&amp;I Contractor, as well as additional groups such as Quality Assurance and IV&amp;V, outside of the core team. As part of the #EHX method, we emphasize the need to coordinate with all stakeholders on all aspects of the Portal/Mobile App, including status, accomplishments, and schedule. This approach leads to fewer issues regarding scope, approach, and direction for the new Portal/Mobile App system.</p> <p>We use our proven #EHX method for providing communication management methods to identify and engage stakeholder involvement in the project. Deloitte has worked with Accenture to successfully deliver, or transition, system projects in Ohio, Texas and California. We have also worked with the DXC team as part of their CalWIN team as well as transitioned from DXC in Colorado. We're professionals who know how to</p>	5-16, 5-18	5.1.1		
GS 7	Project Management	The Contractor shall provide a written Monthly Portal/Mobile App Status Report and verbal status reports during standing weekly, monthly and quarterly management meetings, including the quarterly stakeholder engagement group.	Y	<p><b>Deloitte Digital meets this requirement</b> by providing a monthly report that will communicate progress, issues, risks, and performance against the Portal/Mobile App Work Plan to Consortium team members. Our monthly status report is created by using the Consortium's monthly status report template and will be developed to seamlessly align with the current projects already being conducted at CalSAWS. Additionally, our PM will meet with Consortium leadership and give verbal status reports during their weekly, monthly, and quarterly management meetings, including the quarterly stakeholder engagement group meeting. To mitigate any potential misunderstandings, all the meeting minutes, decisions, and action items will be documented and tracked in the agreed-upon tool with the Consortium.</p>	5-42, 5-45	5.1.5		
GS 8	Design and Development	The Contractor shall provide an approach to designing and developing the portal and mobile application that is based on UCD principles. The Contractor, with assistance and cooperation from Consortium staff, shall employ a robust UCD process to engage Consortium, County and state staff, advocates and clients throughout the development lifecycle. While the State will take the leadership role in the selection and management of advocates and clients, the Contractor shall train, interact with, engage and elicit feedback from the advocate and client participants throughout the DD&I phase.	Y	<p><b>Deloitte Digital meets this requirement</b> by implementing the #EHX system delivery method based on a UCD approach. The design and development phase will be divided into smaller iterations of requirements confirmation &amp; validation and system design finalization sessions involving the Consortium, State, and County staff and other key CalSAWS stakeholders. These activities are followed by system development and unit testing of the application before delivering the application to system integration and UAT testing. Deloitte Digital's Human-Centered Change (HCC) framework adopts Human-Centered Design (HCD) best practices to holistically understand the interests, assumptions, and behaviors of people impacted by change enabling us to delivery training that is tailored to the unique needs of the community.</p> <p><b>Deloitte Digital exceeds this requirement</b> by focusing on streamlining a robust UCD process to engage Consortium, County, and State staff, advocates, and clients. This will include detailed drawings (prototypes) of all key application pages and unique components that depict how content and functionality will be arranged at the page level. During this process, we work closely with CalSAWS stakeholders on the layout of specific types of pages and the priority of content, page-level interactions and navigation schemas to provide an optimum user experience. Increase in user adoption to our Portal/Mobile App will be our key goal.</p>	5-46, 5-50 5-53 5-57	5.2.1 5.2.2 5.2.3		
GS 9	Design and Development	The Contractor shall engage Consortium, County and state staff, advocates and clients in requirements confirmation, clarification and elicitation sessions.	Y	<p><b>Deloitte Digital meets this requirement</b> by scheduling requirement review and confirmation sessions, which are conducted by experienced application functional leads from Deloitte who have extensively worked in requirement gathering and clarification sessions. These requirement sessions will be divided based on tangible functional and business aspects/processes and involve engaging with Consortium staff and key stakeholders. For example, account management requirements will be discussed in one session, and document upload requirements will be scheduled in a separate session.</p> <p><b>Deloitte Digital exceeds this requirement</b> by utilizing #EHX methodology to provide CalSAWS with an efficient and effective process for managing and tracing requirements across each phase of the SDLC. #EHX brings a comprehensive approach to business process and requirements analysis to efficiently analyze, define, refine, document, approve, and maintain traceability of the CalSAWS system requirements. Deloitte Digital functional leads will be actively communicating with Consortium staff and key stakeholders by scheduling requirement confirmation and clarification sessions, leading to finalizing the requirements and approval using the</p>	5-63	5.2.3		



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GS 10	Design and Development	The Contractor shall develop and maintain an RTM to track and ensure all requirements are satisfied and manage throughout the system lifecycle.	Y	<p><b>Deloitte Digital meets this requirement</b> by creating and maintaining a Requirement Traceability Matrix (RTM), which encompasses all the requirements discussed, confirmed, and reviewed during the SDLC. RTM will be source of the application to update/change/approve requirements as the Portal/Mobile App solution is evolved/enhanced.</p> <p><b>Deloitte Digital exceeds this requirement</b> by creating the RTM in JAMA, which is an easy-to-navigate electronic version of the RTM that creates bi-directional traceability between the requirements, design artifacts, development activities, and test cases so that changes are traceable from the Portal/Mobile App code back to the requirement and vice-versa. This visibility lets the Consortium efficiently trace requirements back for future system or business process changes.</p>	5-64, 5-71 5-76 5-96 5-111	5.2.3 5.2.4 5.4.4 5.6		
GS 11	Design and Development	The Contractor shall design, develop, test and deploy the technical platform upon which the application will execute and operate in the secure FedRAMP moderate cloud in accordance with the requirements documented in Attachment J - Statewide Portal/Mobile Application Requirements Cross Reference Matrix, and according to the Project schedule.	Y	<p><b>Deloitte Digital meets this requirement</b> by designing, developing, testing and deploying the Portal/Mobile App on the secure FedRAMP moderate cloud. For further details of our approach, please refer to Section 6.2</p>	5-31 5-45	5.1.2 5.1.5		
GS 12	Design and Development	The Contractor shall use a methodology that supports the most expedient Design, Development and Implementation of the application, including UCD and client engagement, in accordance with requirements contained in Attachment J - Statewide Portal/Mobile Application Requirements Cross Reference Matrix and according to the Project schedule.	Y	<p><b>Deloitte Digital meets this requirement</b> by implementing a UCD approach using the #EHX method. This approach enables the solution to evolve with maximum client engagement with adherence to pre-defined timelines in order to deliver the highest value in the shortest amount of time. Deloitte Digital's system design experience, coupled with the proposed #EHX method and our collaboration with the Consortium, enables us to focus on meeting business requirements with full transparency and on customizing the our NextGen360 solution to meet the business requirements.</p> <p><b>Deloitte Digital exceeds this requirement</b> by establishing smaller iterations of the define, design, implementation, and delivery approach using #EHX. Delivering smaller functional/business modules will help the Consortium, State, and County staff and other key stakeholders get to experience the application earlier. This will engage them in providing feedback on the upcoming deliverables and improving the overall application readiness for CalSAWS end users. Additionally, to accelerate delivery and root the project in an understanding of the diverse client needs across California, we have invested in working with two organizations that serve Californians in need. We talked to real Californians who are seeking assistance and a CBO and an FBO that connect people to public assistance. We applied and tested the approaches we highlight in this proposal. This prework enables us to start tailoring the solution and approach to California, preparing the team to hit the ground running and focus on the things that will drive the highest impact in the human experiences.</p>	5-6 5-72 5-100	5 5.2.4 5.5.2		
GS 13	Language Translations	The Contractor shall provide an approach to translating the CalSAWS portal and mobile applications, including help features, in State-approved threshold languages.	Y	<p><b>Deloitte Digital meets this requirement</b> by leveraging its solution accelerator, which includes English and Spanish. The proposed solution can add other languages as required in Phase 1 and 2 of the implementation. All static text, drop-down menus, buttons, help text, notifications, and documents will be configured to support multiple languages.</p> <p><b>Deloitte Digital exceeds this requirement</b> by leveraging our solution accelerator, which comes pre-loaded with the following features that make it easier for us to add language translations:</p> <ol style="list-style-type: none"> <li>1. Use of global templates for consistent user experience, no matter which language version of the Portal/Mobile App solution they land on</li> <li>2. Placement of language switching options in a prominent location on all the pages of the Portal/Mobile App solution</li> <li>3. Account for text expansion when text is translated from one language to another</li> <li>4. Flexible design layout enables text for different languages fit in a defined space</li> <li>5. Use of UTF-8 for all web pages allows special characters to be displayed properly regardless of the language</li> <li>6. Defining web font that is compatible with all the languages supported by the</li> </ol>	5-78	5.3		

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GS 14	Language Translations	The Contractor shall provide translation services necessary to perform language translations as defined in Attachment J - Statewide Portal/Mobile Application Requirements Cross Reference Matrix, Phases 1 and 2.	Y	<p><b>Deloitte Digital meets this requirement</b> by providing the required translation services for the Statewide Portal/Mobile Application. Deloitte Digital will engage an experienced translation vendor to provide the required translations for all required languages. We will collaborate with Community Based Organizations (CBOs) and Faith-Based Organizations (FBOs) to enable intelligible and intuitive translations for the end users. We will work closely with the Consortium, Counties, and the State for the translation review, validation, and acceptance process.</p> <p><b>Deloitte Digital exceeds this requirement</b> by collaborating with CBOs/FBOs to engage a diverse target audience and by focusing on the following areas:</p> <ol style="list-style-type: none"> <li>1. Language tailored to meet the State and federal reading-level standards to cater to the different demographics of customers looking for public assistance benefits</li> <li>2. Elimination of nonessential information</li> <li>3. Active voice with simple, vigorous verbs and concrete nouns</li> <li>4. Consistent, accurate punctuation (commas and hyphens, especially) and capitalization (distinguish between proper nouns/names and common nouns)</li> <li>5. Cultural competency - Ensuring message is culturally appropriate for each translated language</li> </ol>	5-78	5.3		
GS 15	Language Translations	The Contractor shall provide an approach to incrementally adding language translations during Phase 2 and the maintenance and operations period.	Y	<p><b>Deloitte Digital meets this requirement</b> by having the flexibility of adding more languages without changes to the underlying code. This allows the Consortium to expand language support as required in Phase 2. Additional languages can be added by translating text in the required language and updating reference data stored for web pages or help text display.</p>	5-78	5.3		
GS 16	Language Translations	The Contractor shall work with and support translation activities necessary during testing processes. The Contractor shall include an approach for how they will seek input on the development of translated materials by people who are native speakers of those languages.	Y	<p><b>Deloitte Digital meets this requirement</b> by performing testing of the application for multi-language support as part of the System test cycles, including Accessibility testing. An exhaustive end-to-end test case suite will be executed to validate language selection and accuracy throughout the Portal/Mobile App, covering all of the following core UI aspects:</p> <ol style="list-style-type: none"> <li>1. Screen labels</li> <li>2. Help text</li> <li>3. Emails/Notifications</li> <li>4. Links</li> <li>5. Validation and Error messages</li> <li>6. Typographical errors</li> <li>7. Assessment of cultural appropriateness</li> </ol> <p>We will engage a translator to perform all the translations. We will incorporate a QA process to review all translations by collaborating with CBOs/FBOs to engage native speakers of the required language during the validation process, using survey forms to provide feedback on the application and translated materials. Deloitte will then update and make the necessary changes based on the feedback.</p> <p><b>Deloitte Digital exceeds this requirement</b> by utilizing a proven testing template for multi-language application. The template has been created based on our experience of successful implementation of multi-language applications for states like Georgia.</p>	5-79	5.3		
GS 17	Language Translations	The Contractor shall work with and support the Consortium, counties and State during the translation review, validation and acceptance process.	Y	<p><b>Deloitte Digital meets this requirement</b> by employing a User Interface (UI) team that works closely with the Consortium, Counties, and the State. We will work closely with the Consortium to review English materials, before translation, to assess whether information is well-written, clear, and accurate, and using simple language that is easily understandable. Once these are translated by a certified translator, our UI team conducts meetings for translation review and approval. Deloitte Digital will also provide regular multi-language test case execution status and coverage updates to the Consortium.</p>	5-79	5.3		

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GS 18	Language Translations	The Contractor shall propose an optional quality assurance/validation process of the translated materials.	Y	<b>Deloitte Digital meets this requirement</b> by getting all translations performed by a certified translator. We will work with CBOs/FBOs to engage native speakers of the languages for additional validation on translated text, using survey forms to provide feedback on the application and translated materials. Deloitte will then update and <del>make the necessary changes based on the feedback</del>	5-79	5.3		
GS 19	Testing	The Portal/Mobile App Contractor shall conduct the System Test and assist the Consortium with UAT. The Contractor shall perform the following work relating to System Tests and UAT.	Y	<b>Deloitte Digital meets this requirement</b> by creating the System Test Plan and UAT test plan in collaboration with the Consortium and then conducting a System Test. Both the System Test and the UAT test plan will be part of our Master Test Plan. The Deloitte Digital team will help the Consortium to conduct UAT. The key items included in these plans are testing approach, methodology, entry and exit criteria, in-scope and out-of-scope items, deficiency mgmt. and quality mgmt. processes.  <b>Deloitte exceeds this requirement</b> by serving in a management, advisory, and technical support role by answering questions about the Portal/Mobile App and, when necessary, helping UAT users to review test results. Deloitte will also assist with preparing the data needed to conduct specific UAT test scenarios to emulate all possible real-world system usage situations.	5-82 5-91	5.4 5.4.3		
GS 20	Testing	The Contractor shall develop the Master Test Plan that defines and describes all phases of the Portal/Mobile App testing approach including test stage entrance/exit criteria, test tools, test management processes, defect management, configuration management, and test roles/responsibilities.	Y	<b>Deloitte Digital meets this requirement</b> by developing a Master Test Plan that identifies and documents the scope, resource plan, work plan, and milestones for each testing phase. Our Master Test Plan will clearly identify the timelines required for completing each testing phase, and document mitigation plans for testing activities identified as potential risks. The Master Test Plan will include test stage entrance and exit criteria, test tools to be utilized, test management processes, deficiency management, configuration management, and test roles/responsibilities.  <b>Deloitte Digital exceeds this requirement</b> by utilizing a proven deliverable template for the Master Test Plan from our #EHX method. The template comes pre-loaded with entry and exit criteria, testing roles and responsibilities, and deficiency severity definitions. In our testing, additional focus is given on testing with other CalSAWS systems to confirm that correct data transfer happens between the partner systems and that all business scenarios are being met. Lastly, we access our firm's Testing Center of Excellence in the event guidance or research is needed to support development of the deliverable or to execute the testing processes defined by the Master Test Plan deliverable. Our testing efforts span system, performance, interface, infrastructure and application vulnerability testing, application security testing, smoke testing, unit testing, regression testing, accessibility testing and UAT.	5-84, 5-85	5.4.1		
GS 21	Testing	The Contractor shall create Test Environments to execute all stages of System testing, including a separate UAT Environment for designated Consortium, County, state, advocate and client testers.	Y	<b>Deloitte Digital meets this requirement</b> by establishing and maintaining separate testing environments for all stages of System testing, including a separate UAT environment for designated Consortium, County, State, advocate, and client testers. Deloitte Digital will configure environments to interface/integrate with Portal/Mobile App legacy systems as well as configure the system to support end-to-end business processes.	5-90 5-94	5.4.2 5.4.4		
GS 22	Testing	The Contractor shall develop, maintain and execute the System test scripts, as applicable, at all stages of System Testing.	Y	<b>Deloitte Digital meets this requirement</b> by developing, maintaining, and executing test scripts necessary through all stages of System testing. We will work collaboratively with the Consortium in identifying scenarios that need to be built as part of smoke and regression testing.  <b>Deloitte Digital exceeds this requirement</b> by utilizing modern, industry-recognized tools such as Selenium and JUnit to automate large portions of the test scripts developed throughout all stages of System testing. We conduct a smoke test as part of every build to confirm the stability of key functionality. Additionally, we do regression testing, which helps confirm that there are no downstream or negative	5-91	5.4.3		
GS 23	Testing	The Contractor shall support the UAT environments that support remote access and Consortium/County and stakeholder, advocate and client staff to facilitate execution of UAT including promptly correcting deficiencies, promptly promulgating updated code into the UAT environments and notifying the Consortium of corrected deficiencies to facilitate retest efforts.	Y	<b>Deloitte Digital meets this requirement</b> by supporting designated Consortium, County, State, advocate, and client testers throughout the execution of UAT. Deloitte Digital will validate, track, and prioritize deficiencies written by the Consortium. We will document and resolve any deficiencies encountered during UAT testing per agreed-upon SLAs, promulgate updated code into the UAT environments, and communicate with the Consortium once deficiency fixes have been deployed for re-test.	5-94	5.4.4		

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GS 24	Implementation	The Contractor shall perform the following activities in support of implementation, including but not limited to coordinate with the other CalSAWS portal Contractors to prepare for and transition to the new Portal/Mobile App.	Y	<p><b>Deloitte Digital meets this requirement</b> by collaborating with other CalSAWS Contractors to align on the timeline and releases leading up to go-live. We will coordinate with CalWIN, C-IV, and LRS vendors to prepare for and execute account conversion, system retirement, and other activities to prepare for transition and cut-over. This includes establishing clear channels of communication and a regular cadence for touchpoints to identify and remove roadblocks. We will not execute the CalWIN conversion as part of the DDI Phase. The CalWIN conversion will be completed as part of the change control process to align with the migration of CalWIN to CalSAWS.</p> <p><b>Deloitte Digital exceeds this requirement</b> by bringing a record of collaborating with Accenture and other contractors to successfully deliver system projects and transitions, including currently in Ohio and California. We will plan and execute knowledge transfer with applicable Contractors, and will hold live demonstrations of</p>	5-98 5-99	5.5 5.5.1			
GS 25	Implementation	The Contractor shall prepare and maintain supporting training materials.Training materials for county staff shall be in English only. Training materials for the public or clients shall be in the required languages specified in Requirements FN 4, FN 5, FN 114, FN 115. a)Coordinate with the other CalSAWS portal vendors to prepare for and transition to the new Portal/Mobile App; b)Prepare and maintain supporting training materials for county staff, clients, potential clients, application assisters and authorized representatives; c)Prepare and maintain Online training and help for county staff, clients, potential clients, application assisters and authorized representatives and public users; d)Prepare and maintain a User guide for county staff with instructing instructions about information flows between the Portal and CalSAWS; e)Instructional "how to" video help accessible from the Portal landing page for all users; f)Training environments available for county and application assister use in learning Portal/Mobile functionality; and g)Implement the new application as a single, cut-over activity.	Y	<p><b>Deloitte Digital meets these requirements</b> by designing and developing training content that will be available on-demand in the Portal/Mobile App, in addition to providing virtual instructor-led sessions, training environments, and user guides that will provide more knowledge and hands-on practice for select stakeholders. Training materials for the public will be available in the required languages specified in Requirements FN 4, FN 5, FN 114, and FN 115.</p> <p><b>Deloitte Digital exceeds these requirements</b> by incorporating change management activities into how we assess the needs of impacted stakeholder groups. Our Human-Centered Change (HCC) framework allows us to do a deep-dive into the world of various stakeholder communities to better understand their unique change journeys. When we understand what's important to them, we can tailor our training materials and delivery in a way that resonates with them, from quick-hit on-demand videos to in-depth virtual instructor-led trainings and everything in between. It also allows smoother rollouts of additional enhancements post-go-live by increasing buy-in and readiness.</p>	5-98 5-100	5.5 5.5.2			
GS 26	Final Acceptance	Following successful cutover of the Portal/Mobile App to the production environment, the Contractor will provide an Implementation Complete Report certifying that all Portal/Mobile App requirements have been met and all known Deficiencies have been corrected.	Y	<b>Deloitte Digital meets this requirement</b> by producing two Implementation Complete Reports after successful cut-over and post 90-day production monitoring. There will be one report for the Portal and one report for the Mobile Application. These will detail how all requirements are met. Using bi-directional traceability built into in the RTM tool, we will show the traceability between the requirements, design artifacts, test scenarios, test cases and application code and vice-versa. Our Implementation Complete Report will also have a summary of all the deficiencies that have been corrected. The summary includes description, impact, root cause, and status for each deficiency and the corrective action taken along with the implementation plan.	5-110	5.6			

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GS 27	Final Acceptance	For a period of 90 days immediately following the completion of the implementation cutover event, the Contractor shall monitor and report any Deficiencies to the Consortium. Upon occurrence of a Deficiency, the Contractor shall document and correct such Deficiencies and provide evidence to the Consortium of their disposition.	Y	<p><b>Deloitte Digital meets this requirement</b> by monitoring the production environment for 90 days after go-live and documenting and correcting any deficiencies identified. For each deficiency found in production, we will document the deficiency and provide details on:</p> <ol style="list-style-type: none"> <li>1) Temporary work-around(s)</li> <li>2) Data Correction if needed</li> <li>3) Fix for the deficiency depending on severity and priority</li> </ol> <p><b>Deloitte Digital exceeds this requirement</b> by providing proactive monitoring and reporting of all issues as well as implementing an escalation plan to include the Consortium in the decision-making process around deficiency criticality, priority, and planned fixes. Deloitte will communicate with transparency throughout the 90-day period and will demonstrate for the Consortium any fixes or updates to the Portal and Application once defects are corrected, confirming mutual acceptance of the</p>	5-108	5.6		
GS 28	Final Acceptance	The Portal/Mobile App shall achieve Final Acceptance if and when the Implementation Certification Report is approved, and all Deficiencies identified during the 90-day period immediately following the implementation cutover event have been corrected.	Y	<p><b>Deloitte Digital meets this requirement</b> by producing the Implementation Complete Reports confirming that all requirements are met and all known deficiencies were corrected for a period of 90 days following the cutover to production.</p> <p><b>Deloitte Digital exceeds this requirement</b> by providing additional documentation, results, reports, and findings to help the Consortium verify and validate the system's conformance to requirements.</p>	5-111	5.6		
GS 29	Maintenance and Operations	The Contractor shall provide system maintenance and operations, which shall include all goods and services necessary to manage, operate, enhance and support the Portal/Mobile app to comply with the approved Portal/Mobile M&O Plan and shall be provided for the term of the agreement.	Y	<p><b>Deloitte Digital meets this requirement</b> by providing industry-leading M&amp;O tools, processes, professionals, and a digital workforce to perform system monitoring and day-to-day Portal/Mobile App maintenance and enhancement services.</p> <p><b>Deloitte Digital exceeds this requirement</b> by providing a detailed ready-to-go plan around key processes to make the Portal/Mobile App M&amp;O successful.</p>	5-116, 5-119	5.8		
DL 1	Deliverable 1	The Contractor shall develop a statewide Portal/Mobile Work Plan that includes the following: a) Task and subtask descriptions with Deliverables specifically indicated; b) Estimated number of Portal/Mobile App Contractor staff identified by levels and types; c) Estimated hours by task and subtask; and d) Gantt charts showing planned start and end dates (durations) of all tasks, subtasks, and major milestones and Deliverables, including time frames for the Consortium's review and approval of all resulting	Y	<p><b>Deloitte Digital meets this requirement</b> by providing a detailed MS Project Schedule. The detailed work plan provides, tasks, subtasks, Deliverables, and staff assignments to tasks. Complete staffing and effort, in hours, are assigned to each task and subtask. Deloitte Digital has experienced project management professionals to manage the MS Project schedule to meet these requirements and produce accurate schedules and Gantt charts that clearly illustrate durations of tasks and subtasks, major milestones, and Deliverables.</p>	5-34	5.1.3		
DL 2	Deliverable 1	The Contractor shall update the Work Plan monthly to reflect the following: a) Task and subtask percent complete; b) Actual number of Portal/Mobile App Contractor staff; and c) Actual hours by task and subtask; and d) Updated Gantt charts.	Y	<p><b>Deloitte Digital meets this requirement</b> by utilizing our #EHX method pared with the Consortium's PCD to coordinate and manage stakeholder input to accurately track percent complete, contractor staffing counts, actual hours planned v. worked, and updates to Gantt charts.</p>	5-35	5.1.3		
DL 3	Deliverable 1	The Contractor shall submit the initial work plan within 20 calendar days of project initiation and updated and submitted on a monthly basis.	Y	<p><b>Deloitte Digital meets this requirement</b> by providing a detailed MS Project Schedule containing the deliverables required to complete the Portal/Mobile App Project. The initial MS Project work plan provided in the RFP response will be leveraged to create the detailed Work Plan and will be initially submitted within 20 days of project start. The monthly submissions will be coordinated through extensive review with required stakeholders throughout all phases of the Portal/Mobile App Project for accurate monthly updates and on-time monthly submissions.</p>	5-35	5.1.3		

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Approach SOW & Deliverables			Contractor Response				For Consortium Use Only	
REQ#	Category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment
DL 4	Deliverable 2	The Contractor shall provide a monthly status report that provides details regarding participation by the statewide portal/mobile app contractor team. At a minimum the monthly status must include the following: a) An executive summary (Both MS Word and MS PowerPoint formats); b) An updated summary of the work plan progress against the approved baseline work plan; c) An updated list of DEDs and Deliverables drafted, in process, submitted and approved during the period; d) Issues identified by or assigned to the Contractor; and e) Risks identified by or assigned to the Contractor.	Y	<b>Deloitte Digital meets this requirement</b> by providing a detailed Monthly Status Report using the Consortium's format, including the executive summary , updates of Work Plan progress against the baseline Work Plan, complete status of the DED and Deliverables progress, and detailed Risk and Issues tracking.	5-42	5.1.5		
DL 5	Deliverable 2	The Contractor shall submit the monthly status report within five (5) calendar days after the completion of a month.	Y	<b>Deloitte Digital meets this requirement</b> by submitting the monthly status report within 5 calendars days after the completion of the previous month.	5-43	5.1.5		
DL 6	Deliverable 3	The Contractor shall provide a UCD Plan that provides the approach for Consortium, counties, State, client and advocate participation during, at a minimum, requirements confirmation, design, test, and ongoing M&O activities. At a minimum the UCD Plan must include the following: a) Approach to User Centered Design, development and test; including the application of UCD tools, such as focus groups, participatory design sessions, observations of users interacting with the technology and 1:1 interviews; b) Roles and responsibilities of the Contractor, Consortium, counties, State, advocates and clients; c) Communication processes to engage the Consortium, counties, State, advocates and clients during the design, development and test activities; d) Identification and tracking of metrics associated with the overall user experience and application of best practices to a continuous improvement cycle; e) How business outcomes will be achieved in a dynamic, intuitive, and user-friendly manner through robust UCD; and f) Approach to UCD during the M&O Phase, including ongoing user research and solution identification to be conducted as part of system maintenance and improvement over time. Activities could include (but not be limited to): •Usage data assessment and analysis; •Yearly usability review that includes a number of measures with qualitative feedback from consumers and application designers;	Y	<b>Deloitte Digital will meet this requirement</b> by providing a User-Centered Design Plan that will establish how and when users will be engaged during the initial requirements, design, and test and as a part of ongoing Portal/Mobile App support. Our experience in state and local governments shows that creating a shared awareness and understanding across the project team and stakeholder groups increases the buy-in and accelerates timelines for user research and engagement. Throughout the #EHX method, we call out where and how we will be involving users. These elements are the basis for the UCD Plan.  We will validate the complex stakeholder ecosystem by conducting Ambition labs and online surveys with key Portal/Mobile App stakeholders to collaborate and understand 1:1 the user's pain points and issues. This will also clarify the various key functional actors involved in the Portal/Mobile App and their responsibilities. All this will facilitate Deloitte to capture detail requirements and develop and submit the requirements traceability matrix.	5-50	5.2.1		

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Approach SOW & Deliverables			Contractor Response				For Consortium Use Only	
REQ#	Category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment
DL 7	Deliverable 4	The Contractor shall create a Requirements Traceability Matrix (RTM) that tracks the requirements defined in the Attachment J - Statewide Portal/Mobile Application Requirements Cross-Reference Matrix. The RTM shall provide the basis for monitoring and controlling the evolution of the functionality that will fulfill each requirement throughout the design, development, test and implementation tasks. This matrix and updates must be delivered as follows: a) The initial RTM must be submitted within 60 calendar days of Project initiation; b) RTM Update 1 is due ten (10) calendar days following the conclusion of the requirements confirmation process; c) RTM Update 2 is due ten (10) days following the conclusion of the design process; d) RTM Update 3 is due ten (10) days following the conclusion of the testing process; and e) RTM Update 4 is due ten (10) days following Final Acceptance.	Y	<b>Deloitte Digital meets this requirement</b> by creating an RTM that will validate all requirements are checked via design documents and test scenarios/cases such that no functionality is unchecked during Portal/Mobile App testing. To monitor adherence to system requirements throughout the project lifecycle, we use JIRA/JAMA as a requirement repository and management tool as established in the Initiate Phase. JIRA/JAMA facilitates collaboration, manages requirements, and establishes traceability between the requirements, test artifacts, deficiencies, and work items. The RTM is designed to maintain a history of requirements and provide traceability to the UCD research findings. Deloitte Digital will provide updates to RTM, delivered them to the Consortium as noted in the requirement.	5-64, 5-71 5-76 5-96 5-111	5.2.3 5.2.4 5.4.4 5.6		
DL 8	Deliverable 5	The Contractor shall provide the Portal General Systems Design, which will contain and address the following: a) Methodology and Assumptions; b) Mock Application Page Layouts including navigation; c) Storyboards, wireframes and prototypes as applicable; d) Reports Layouts; e) Logical Data model(s); f) SAWS Interface specifications; and g) Business Rules.	Y	<b>Our Deloitte Digital meets this requirement</b> by providing a General System Design Document for the Portal/Mobile App, including the overall SDLC methodology. It will contain details about various application page/screen layout, mockups, wireframes, and prototypes. Physical and logical data models will be included along with the interface specifications to interact with various Interface partners. Business rules as and when needed will be written in simple readable format for all the stakeholders.  We will work with the Consortium and Portal/Mobile App users to create the General System Design Document for the Portal/Mobile App that is understandable by both business and technical users. The details captured in the General System Design Document can be traced to the RFP's requirements through RTM.	5-67	5.2.3		
DL 9	Deliverable 6	The Contractor shall provide the Portal Technical Systems Design that will contain a comprehensive architectural overview of the portal/mobile app software, including a depiction of each layer and area of application in terms of software components. It will include: a) Technical Architecture specifications; b) System components and entity relationship diagrams; c) Network topology diagrams, including Cloud computing environment; d) Information Security design (application and network security protocols); e) Application architecture design (software layers); f) Webservice/application programming interface (API) design; g) Physical Data Model; h) Physical and logical directory path locations; and	Y	<b>Deloitte Digital meets this requirement</b> by providing a TSD containing a comprehensive architectural overview of the Portal/Mobile App. TSD will contain the architecture detail and components used in building the application. It will also contain other key items like entity relationship diagrams, network topology, cloud computing environment, security design, API design and physical data model, physical and logical directory path locations and library specification, and update tools.	5-69	5.2.3		

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Approach SOW & Deliverables			Requirement Met (Y/N)	Contractor Response			For Consortium Use Only	
REQ#	Category	Requirements			Page #	Section #	REQ Met	Reviewer Comment
DL 10	Deliverable 7	<p>The Contractor shall provide a Master Test Plan which will encompass the approach and processes for all stages of system testing, including regression testing, and ensure all system requirements and specifications are fully tested and verified. The system test plan must include but is not limited to the following:</p> <p>a) A description of the purpose and structured test approach for each stage of System testing;</p> <p>b) A description of Contractor, Consortium, county, state, advocate and client testing roles and responsibilities;</p> <p>c) A description of tools, environments and controls to be used during each stage of system testing;</p> <p>d) System test schedule;</p> <p>e) Standards for scenario and script development, execution and sign-off;</p> <p>f) Processes for identifying, documenting and tracking Deficiencies, corrections to Deficiencies and re-tests once corrected code is promulgated to the system test environments;</p> <p>g) Standards for weekly test status reporting;</p> <p>h) Tracking to the test condition level; and</p> <p>i) Entrance and exit criteria for each stage of system</p>	Y	<p><b>Deloitte Digital meets this requirement</b> by delivering a Master Test Plan that encompasses the approach and processes for all stages of system testing, including regression testing, to confirm that all system requirements and specifications are fully tested and verified. The Master Test Plan will include a detailed description of the purpose and structure for all phases of testing, as well as the testing roles and responsibilities of all Deloitte Digital Consortium, County, State, advocate, and client testers. The plan will also include a detailed accounting of all tools, environments, and controls to be used during each stage of testing; a test schedule; and a listing of standards for scenario and script development, execution, and sign-off. Furthermore, the plan will lay out processes for identifying, documenting, and tracking system deficiencies, corrections to deficiencies, and re-tests of these deficiencies after corrected code has been promulgated to the appropriate system test environments. Additional elements of the system plan will include standards for weekly test status reporting, tracking to the test condition level, and entrance and exit criteria for each stage of testing.</p> <p><b>Deloitte Digital exceeds this requirement</b> by utilizing a proven deliverable template for a Master Test Plan from our #EHX method. We modify this template based on Consortium feedback. As with all other aspects of our proposed Portal/Mobile App solution, the Master Test Plan deliverable will be developed with people in mind. A key goal of our testing methodology is to reduce risk to implementation. One way this is accomplished is by aligning all elements of the testing process with stakeholder insights. This alignment can be obtained only through constant close collaboration with Consortium stakeholders throughout all phases of testing outlined in the Master</p>	5-84, 5-85	5.4.1		
DL 11	Deliverable 7	<p>The Contractor shall describe UAT support to include:</p> <p>a) Overall approach for supporting UAT;</p> <p>b) A description of processes Contractor will perform to support the UAT;</p> <p>c) A description of tools, environments and controls to be provided and supported during the UAT; d) A proposed UAT schedule;</p> <p>e) A description of Contractor, Consortium, county, state, advocate and client roles, responsibilities and resources needed to perform the UAT;</p> <p>f) UAT problem/deficiency reporting, tracking and correction/resolution process; and</p> <p>g) Entrance and exit criteria for UAT.</p>	Y	<p><b>Deloitte Digital meets this requirement</b> by delivering a documented plan for the overall approach to supporting UAT. This plan includes a description of processes that Deloitte Digital will perform in support of UAT efforts; a description of tools, environments, and controls to be provided and supported throughout UAT; and a proposed UAT schedule. The plan will also include a description of Deloitte Digital, Consortium, County, State, advocate, and client roles, responsibilities, and resources needed to perform the UAT, a detailed process for the reporting, tracking, and resolution of UAT problems/deficiencies, and well-defined entrance and exit criteria for UAT.</p> <p><b>Deloitte Digital exceeds this requirement</b> by delivering a UAT support experience driven by our #EHX method. Effective and transparent communication and stakeholder involvement across all aspects of the UAT phase of testing allow us to provide a viable solution that delivers the intended impact to users. Collaboration with all Consortium stakeholders is essential to the success of UAT and, by extension, to the success of the overall Portal/Mobile App solution. Our philosophy of embracing human-centered design enables us to provide this level of collaboration in an</p>	5-86	5.4.1		
DL 12	Deliverable 8	<p>The Contractor shall provide a Portal Implementation Complete Report which certifies that all Portal requirements have been met and that all known deficiencies have been corrected.</p>	Y	<p><b>Deloitte Digital meets this requirement</b> by providing the Consortium with a Portal Implementation Complete Report, which will document how all requirements are met. Using bi-directional traceability built into the RTM tool, we will show the traceability between the requirements, design artifacts, test scenarios, and test cases and application code and vice-versa. Our Implementation Complete Report will also have a summary of all the deficiencies that have been corrected. The report will have description, impact, root cause, and status for each deficiency and the corrective action taken for the deficiency along with the implementation plan and schedule.</p> <p><b>Deloitte Digital exceeds this requirement</b> by including in the report additional detail about lessons learned and ideas for future improvements as well as documenting any enhancement requests captured through the process but not implemented during the development of the Portal.</p> <p>The report will include:</p> <p>a. Summary of activities, results and outcomes</p> <p>b. Summary of each deficiency identified</p> <p>c. Summary of lessons learned</p> <p>d. Recommendations for any improvements</p> <p>e. Summary of enhancement items not yet implemented</p>	5-110	5.6		



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Approach SOW & Deliverables			Requirement Met (Y/N)	Contractor Response			For Consortium Use Only	
REQ#	Category	Requirements			Page #	Section #	REQ Met	Reviewer Comment
DL 13	Deliverable 9	The Contractor shall provide an M&O plan to document the approach for completing required M&O tasks for the defined Phase 3 M&O period. The M&O plan must contain the following: a) Overall approach to M&O; b) Staff plan with roles and responsibilities; c) Key performance metrics; Proposed service level agreement (SLA); d) Approach for managing and reporting metrics and SLAs; and	Y	<b>Deloitte Digital meets this requirement</b> by providing a comprehensive M&O plan, which will include M&O approach, staff roles and responsibilities, SLAs, key performance metrics, and an approach for managing and reporting these metrics and SLAs.	5-106	5.5.3		
DL 14	Deliverable 10	The Contractor shall provide the Mobile App[ General and Technical Systems Design, which will contain and address the following: a) Methodology and Assumptions; b) Mock Application Page Layouts including navigation; c) Storyboards, wireframes and prototypes as applicable; d) Reports Layouts; e) Logical Data model(s); f) SAWS Interface specifications; and g) Business Rules. h) Technical Architecture specifications; i) System components and entity relationship diagrams; j) Network topology diagrams, including Cloud computing environment; k) Information Security design (application and network security protocols); l) Application architecture design (software layers); m) Webservice/application programming interface (API) design; n) Physical Data Model; o) Physical and logical directory path locations; and p) Format library specification, and update tools.	Y	<b>Deloitte Digital meets this requirement</b> by providing a GSD that will include the overall SDLC methodology. It will contain details about various application page/screen layout, mockups, wireframes, and prototypes. Physical and logical data models will be included along with the interface specifications to interact with Interface partners. Business rules as and when needed will be written in a simple readable format for all the stakeholders. TSD will contain the architecture detail and components used in building the application. It will contain other key items like entity relationship diagrams, network topology, cloud computing environment, security design, API design and physical data model, physical and logical directory path locations and library specification, and update tools.  <b>Deloitte Digital exceeds this requirement</b> by working with the Consortium to create a General System Design Document for CalSAWS that is understandable by both business and technical users. TSDs will contain a granular level of detail in order to allow the developers to build the Portal/Mobile App with absolute clarity.	5-67, 5-69	5.2.3		
DL 15	Deliverable 11	The Contractor shall provide a Mobile App Implementation Complete Report which certifies that all Mobile App requirements have been met and that all known deficiencies have been corrected.	Y	<b>Deloitte Digital meets this requirement</b> by providing the Consortium with a Portal Implementation Complete Report, which will document how all requirements are met. Using bi-directional traceability built into the RTM tool, we will show the traceability between the requirements, design artifacts, test scenarios, and test cases and application code and vice-versa. Our Implementation Complete Report will also have a summary of all the deficiencies that have been corrected. The report will have description, impact, root cause, and status for each deficiency and the corrective action taken for the deficiency along with the implementation plan and schedule.  <b>Deloitte Digital exceeds this requirement</b> by including in the report additional detail about lessons learned and ideas for future improvements as well as documenting any enhancement requests that were captured through the process but not implemented during the development of the Portal.  The report will include: a.Summary of activities, results and outcomes b.Summary of each deficiency identified c.Summary of lessons learned d.Recommendations for any improvements e.Summary of enhancement items not yet implemented	5-110	5.6		

# REQUIREMENTS CROSS-REFERENCE MATRIX

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Phase 1 - DD&I Technical					Contractor Response				For Consortium Use Only	
REQ#	Category	Sub-category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment	
TR 1	Technical	Architecture	The Contractor shall provide a Portal/Mobile App consisting of the following main components: •HTML5 web site •HTML5 mobile website •iOS hybrid application •Android hybrid application •API gateway •Backend services •Database •Automation code & scripting	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a Portal/Mobile App solution accelerator which brings a working stack, proven in production in other states. Our solution brings together a modern responsive design, cloud-enabled, ADA-compliant, and secure framework. Its out-of-the-box accelerators such as style guides, development documentation, and code manuals allow for a consistently reusable and scalable framework that can be easily customized to any client. It extends industry standard frameworks and features to support rapid development and prevents reinvention of common solutions.  <b>Deloitte Digital's solution exceeds this requirement</b> as our solution accelerator supports rapid application development by applying style guides, next generation UX themes, reusable and scalable page elements and other industry frameworks preventing re-invention of common solutions.	6-91	6.2.5			
TR 2	Technical	Architecture	The Contractor shall provide a Portal/Mobile App back-end source code developed in Java version 8 or its successor version, only if this is applicable to the solution being proposed.	Y	<b>Deloitte Digital's solution meets this requirement</b> through our solution accelerator uses latest technologies including Spring Boot v2.2 with JDK 11 SE, HTML5, and the React framework to deliver a Portal/Mobile App as a responsive mobile web application that works on any form factor including desktop, tablets and mobile phones. This will give us the head start in Java based microservices development much advanced than Java 8 based stack.  <b>Deloitte Digital's solution exceeds this requirement</b> by supporting the latest technologies including React front end, Spring boot based service layer and modern day Cloud CI-CD pipeline based on cloud native PAAS services. Also, with our initial analysis of the current code written by the incumbent, we have seen several risk areas that must be addressed. A couple of these big technical debts are: 1.) Outdated architecture and code patterns prevent modern app development and add risk and complexity and 2.) We found thousands of bugs in the existing code; low quality leads to slower changes and more expensive maintenance.	6-91	6.2.5			
TR 3	Technical	Architecture	The Contractor shall provide a Portal App front-end source code developed in industry-standard coding languages/platforms such as Angular 8, only if this is applicable to the solution being proposed.	Y	<b>Deloitte Digital's solution meets this requirement</b> through our solution accelerator which uses latest technologies based on Java 8 and React based framework. We understand Angular is popular, but React has many benefits over Angular like quick and efficient, an additional benefit of JSX, flexibility in building blocks, isomorphic JavaScript, support of the large community, and many more. Our React based UI framework complies with the Web Content Accessibility Guidelines (WCAG) with global standards of the World Wide Web Consortium (W3C) through semantic HTML elements. Easy learning curve for developers with Native HTML support and built in error boundaries and easy to upgrade than Angular based code. Components can be completely reused in mobile SDK (React Native). Launched in September 2016, Angular (also known as Angular 2.0) is a complete rewrite of AngularJS (Angular 1.0), which was introduced in 2010 which creates a large effort to "upgrade".  <b>Deloitte Digital's solution exceeds this requirement</b> by having a loosely couple architecture that can be plugged into any business logic layer through lambda services. Our front-end is responsive web design so can be displayed on many device platform like phone, tablets and desktops, without having to maintain multiple code sets. Our solution also brings a large library of React based components to accelerator development.	6-91	6.2.5			
TR 4	Technical	Architecture	The Contractor shall provide Mobile App source code developed in industry-standard coding languages/platforms such as Angular 8 as a hybrid application, only if this is applicable to the solution being proposed.	N/A	<b>This requirement does not apply to the solution being proposed.</b> Deloitte proposes to build a responsive web app which will support multiple web browsers on desktop, tablet and mobile devices. Our front-end is responsive web design so can be displayed on many device platform like phone, tablets and desktops, without having to maintain multiple code sets. Also, our approach reduces the need for the State to test both Android and iOS platforms, on different types of phones and tables, using different versions of the mobile OS, which there are many. The permutation of testing from OS, version of OS and device types are in the thousands. For more information please see Section 6.2.5 - Architecture.	N/A	N/A			

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TR 5	Technical	Architecture	The Contractor shall provide a Portal/Mobile App as a web-based application compatible with the latest and penultimate versions of standard, widely-used web browsers, such as Edge, Chrome, Firefox, Safari, etc.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by providing a web-based application which uses Responsive Web Design. Our solution is compatible with current (as of Jan 2020) versions of the following browsers – Microsoft Edge (desktop only on Windows), Chrome (mobile on Android and iOS; tablet on android and iPadOS; desktop on Mac, Windows, and AndroidOS/ChromeOS), Firefox (desktop on Mac, Windows), and Safari (mobile on iOS, tablet on iPadOS, and desktop on Mac).</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by knowing that different browsers sometimes react little different based on specific functionality like Doc upload, we will follow web standards so that our solution is most compatible with all major web browsers, but we will only perform testing on Edge (desktop only on Windows), Chrome (mobile on Android and iOS; tablet on android and iPadOS; desktop on Mac, Windows, and AndroidOS/ChromeOS), Firefox (desktop on Mac, Windows), and Safari (mobile on iOS, tablet on iPadOS, and desktop on Mac) on versions that are current as of Jan 2020. Our solution accelerators also provide strong design and code patterns that are standard based, 508 tested and multi-browser compatible avoiding costly rework or custom coding from scratch.</p>	6-91	6.2.5			
TR 6	Technical	Architecture	The Contractor shall provide a Mobile App that is a hybrid application compatible with current IOS and Android devices.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> through our solution accelerator which uses latest technologies including Java version 8.0., HTML5, and the React framework to deliver both a portal application, and a responsive mobile web application that works on any form factor including desktop, tablets and mobile phones across both iOS and Android operating system. We are only building a responsive web app that supports web browsers on desktop, tablet and mobile devices.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> as we are future ready. As a future enhancement, if Consortium decides to build a native mobile App, our React-based web app could be leveraged to build the separate hybrid mobile app. In order to increase outreach and portability of key functionalities, Consortium may decide to build a native mobile App. Our React based solution will allow to write native apps in JavaScript for both iOS and Android. It will give us the ability to use all the native components like gestures, push notifications, camera, and location.</p>	6-91	6.2.5			
TR 7	Technical	Architecture	The Contractor shall provide back-end cloud-based services shall be deployed in a fully automated manner using CI/CD pipelines.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> through our iterative delivery approach using open source CI and build automation tools. Our approach to developing a modern Portal/Mobile App uses a combination of open source technology, test-driven, reusable assets including Gitlab, Maven, CodeDeploy, CodePipeline.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by automating each stage of the application lifecycle from code check-in to production deployment. CD builds on CI with policy-based deployment to the Development (Dev), Integration (INT), System Test (SAT), User Acceptance Test (UAT), Performance (PRF), Prod-Staging (STG), and Production (PRD) environments. We will follow code quality processes including creating automated unit and integration test scripts that are integrated with our continuous build and deployment process. During development cycles, we will run automated security tests and load tests with every build to identify security vulnerability and performance issues early in the development phase.</p>	6-91	6.2.5			
TR 8	Technical	Architecture	The Contractor shall provide Back-end services shall be protected by AWS Web Application Firewall and the origin must be served by a CDN such as CloudFront, only if applicable to the solution being proposed.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by providing back end service protection through AWS Web application firewall. AWS Web Application Firewalls will be leveraged to prevent DDoS attacks, as well as secure applications. Network Access Control Lists (NACLs) and Security Groups will be leveraged to provide foundational network controls. The application traffic will be routed via Cloud Distribution Network (CDN) and from there to API gateway which will then route the traffic appropriately.</p>	6-91 6-115	6.2.5 6.2.10			
TR 9	Technical	Architecture	The Contractor shall manage the relationship with the Mobile App, Apple's App Store and Google Play and shall manage/deploy new releases to the stores as needed.	N/A	<p><b>This requirement does not apply to the solution being proposed.</b> Deloitte proposes to build a responsive web app which will support multiple web browsers on desktop, tablet and mobile devices. Our front-end is responsive web design so can be displayed on many device platform like phone, tablets and desktops, without having to maintain multiple code sets.</p>	N/A	N/A			
TR 10	Technical	Architecture	The Contractor shall provide a Portal/Mobile App graphic user interface developed with markup and scripting languages and global standards of the World Wide Web Consortium (W3C), ( <a href="https://www.w3.org/WAI/standards-guidelines">https://www.w3.org/WAI/standards-guidelines</a> ) including Hypertext Markup Language 5 (HTML5), Cascading Style Sheets (CSS), and JavaScript.	Y	<p><b>Deloitte Digital's solution meets this requirement as our Portal/Mobile App solution</b> accelerator is developed with a graphical user interface using markup and scripting languages based on global standards of the World Wide Web Consortium (W3C) including HTML5, CSS3, and React through semantic HTML elements</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by having our solution accelerators provide strong design and code patterns that are standard based, 508 tested and multi-browser compatible avoiding costly rework or custom coding from scratch.</p>	6-91	6.2.5			

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Phase 1 - DD&I Technical					Contractor Response				For Consortium Use Only	
REQ#	Category	Sub-category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment	
TR 11	Technical	Architecture	The Contractor shall provide a Portal/Mobile App using Hypertext Transfer Protocol Secure (HTTPS) over Transport Layer Security (TLS) to protect the privacy and integrity of data in transit through bidirectional encryption of communications between the cloud servers and the web browsers, including secure access via the internet and government network infrastructures for authorized users (insourced and outsourced staff).	Y	<p><b>Deloitte Digital's solution meets this requirement</b> as all our webservices are exposed using Hypertext Transfer Protocol Secure (HTTPS) over Transport Layer Security (TLS) version 1.2 to ensure all communications between clients and service gateway are encrypted to protect the privacy and integrity of data in transit.</p> <p><b>Deloitte exceeds this requirement</b> as we maintain the certificates through the docker control panel which helps in bidirectional encryption of communications between the cloud servers and the web browsers, including secure access via the internet and government network infrastructures for authorized users (insourced and outsourced staff).</p>	6-99	6.2.5			
TR 12	Technical	Architecture	The Contractor shall provide a Portal/Mobile App fully operational in the CalSAWS instance of the AWS cloud environment, only if applicable to the solution being proposed.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> with our solution accelerator hosted in the CalSAWS instance of AWS cloud environment. Deloitte plans to work with the Consortium to stand up the environment for the Portal Mobile application. The AWS root account will be set up and owned by the Consortium and necessary provisioning of infrastructure will be provided prior to the start of the project.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> as the Deloitte team will set up the infrastructure based on Docker and Kubernetes on AWS EC2 instances.</p> <ul style="list-style-type: none"> <li>• We plan to have environments for Development (Dev), Integration (INT), System Acceptance Test (SAT), User Acceptance Test (UAT), Performance (PRF), Staging (STG), Training (TRN) and Production (PRD). Details of which can also be found in Section 5.4.2</li> <li>• CentOS will be the Operating system used for EC2 Docker instances</li> <li>• Application runtime will be on Apache Httpd web server, Spring Boot application server (with embedded Tomcat) and Postgres RDS.</li> <li>• Twistlock will be used as the container security tool</li> </ul>	6-91, 6-96	6.2.5			
TR 13	Technical	Architecture	The Contractor shall provide a Portal/Mobile App database design to deliver optimal performance and scalability using an industry-standard Relational Database Management System (RDMS).	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by choosing an industry leading open source RDMS that is highly extensible and scalable, saving Consortium from paying high license costs and getting locked into proprietary software. With full ACID (atomicity, consistency, isolation, and durability) compliance, PostgreSQL supports easy integration with data refactoring tools like Liquibase and support integration with location based extenders like PostGIS. With ability to scale based on business need, supporting a multi-threaded architecture, providing high application availability with open distributed data management capabilities, PostgreSQL supports several database performance features including replication, data security and stored procedure support</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> as its database also includes features aimed to help developers build applications, administrators to protect data integrity and build fault-tolerant environments, and help you manage your data no matter how big or small the dataset.</p>	6-91	6.2.5			
TR 14	Technical	API	The Contractor shall provide API services hosted in the CalSAWS instance of the AWS - cloud environment and served by a commercial grade API gateway (provided by Consortium).	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by providing API services hosted in AWS cloud environment served by the Consortium's API gateway. We are a global premier partner with AWS which helps in installing/configuring our Portal/Mobile App solution accelerator with enhanced support of AWS top System Architects.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by utilizing a RESTful microservice framework to allow each service to run unique processes and be independently deployable. Our API design principle is guided by lightweight microservices that can help organizations achieve start up speed and agility. Our microservices approach allows for each service to be organized around the business functionality, technology independence between services, and improved DevOps capabilities.</p>	6-87	6.2.4			
TR 15	Technical	Function	The Contractor shall provide a Portal/Mobile App that minimizes hardcoding of business rules by defining and delineating such rules onto logic tables to be used by the Portal/Mobile in processing input and generating output, and said logic tables that can easily be reconfigured or modified by the appropriate Consortium staff as determined by the Consortium Executive Director.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by using an editable rules page driven by configuration tables that separate business rules from the application code. The rulesets for modules including Questionnaire and Recommendations can be easily configured using the editable rules page by the appropriate Consortium staff as determined by the Consortium Executive Director.</p> <p><b>Deloitte Digital's solution exceeds this requirements</b> by knowing when the rulesets for modules should be in the separate business rules like for ABAWD, or Screening and DSNAP. Our rules will have time and date feature that allow for it to be configured using the editable rules page by the appropriate Consortium staff as determined by the Consortium Executive Director.</p>	6-91	6.2.5			

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TR 16	Technical	Audit Logs	The Contractor shall provide a Portal/Mobile App that maintains an audit trail or user log of specific case actions, and the database shall maintain all records unless data retention policies of the Consortium require the purging of records.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by enabling audit logs for all applicable AWS services supporting SAWS.. Our database maintains all records unless data retention policies of the Consortium require the archive and purging of records. After 1-year data will be archived in AWS S3 encrypted using AES 256-bit server side encryption managed by AWS KMS. Further, access to the bucket itself will be restricted to applications and users to a read-only permission so that the logs are preserved and so we can establish a clear trail of auditability to satisfy security requirements. For any less accessed data with longer purging requirements can be moved to Amazon S3 Glacier. The logs will also be forwarded to the State's SIEM tool where they can be analyzed, correlated and get dashboards created for County administrators to access.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by restricting access to the audit database to read-only permissions for users and applications so that audit logs are preserved. We will work with the Consortium on the retention policy of this information. The audit trail will help in determining any unauthorized access to the system. These logs can be integrated with the Consortium's SIEM system for further analysis.</p>	6-101	6.2.6			
TR 17	Technical	Backup and Restore	The Contractor shall provide a Portal/Mobile App that maintains an automated mechanism to revert to the penultimate version of the application should users experience failure or major defects in the latest version, as determined by the Consortium.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by maintaining the business continuity of the system during production failures or disaster recovery, the Portal/Mobile solution accelerator is equipped to handle rollback scenarios. The enhanced persistence layer also allows audit history for records in the database, acting as an auditing mechanism and satisfying the requirement to track all user transactions.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by storing backups in at least three devices and supporting industry-leading scalability, availability, durability, and security so the backups are protected and available when needed. The solution provides a backup production database that mirrors the primary production database in near real-time with the ability to activate the backup database within 15 minutes should the primary database become corrupt. Ultimately, the Consortium gets a highly available solution that is load balanced with little no downtime.</p>	6-103	6.2.7			
TR 18	Technical	Regulatory	The Contractor shall provide a Portal/Mobile App that displays terms of service (terms of use), including confidentiality and privacy policies, upon logging into Portal/Mobile and require the user to confirm their review and understanding of such terms and conditions before permitting user access to Mobile/Portal. Prior to collection and storage of this information, the Contractor shall follow the noticing requirements outlined in Government Code Section 11015.5 to inform clients that this information will be captured and stored for future use.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by providing a solution that upon initial account creation and sign on, new users are prompted to view terms and conditions, privacy policies, and confidentiality agreements as defined by the Consortium.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by tracking the changes in policies and retriggering the terms of service page when there is an update. And we can record which version of the terms and policies they viewed and accepted.</p>	6-113	6.2.10			
TR 19	Technical	Architecture	The Contractor shall provide a Portal/Mobile App providing context-sensitive online help content at the page level.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by providing page level context-sensitive help as part of the React based UX solution design. User will get help information based on the action they are doing and the control they are accessing within the page. Also the user guide developed through our proposed software will provide County staff with high-level details of the information flows between CalSAWS and the Portal/Mobile App. The goal of our approach is to make sure it's usable with minimal intervention and, none required an extensive user guide or required in-person training. All modules will have a friendly and intuitive UX, project was tailored to the personas they serve, and they often include context sensitive help or onboarding (user guided training at initiation) embedded into the core experience</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by knowing that help is mandatory and useful, but more importantly, we have a "nudge engine" that actually can help prevent common misses, oversights or encourage the users to insert non-mandatory information that will help the processing time and avoid extra case worker follow-ups.</p>	6-60 6-91	6.1.8 6.2.5			

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TR 20	Technical	Architecture	The Contractor shall provide a Portal/Mobile App that presents hyperlinks (universal resource locator and its label) to community resources and relevant websites that can be added and updated by County-specified administrators.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by preparing hyperlinks to community resources and relevant websites that can be added and updated by County-specified administrators through reference tables and our help software tool. Our solution is configurable to show the relevant website as a separate pop-up from within the application or open a separate browser window. We will also provide optional warning message prior to navigating the user to an external site off of the State's domain. Users can be made aware that they are accessing a site that is not managed by the State.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by providing optional warning message prior to navigating the user to an external site off of the State's domain. Users can be made aware that they are accessing a site that is not managed by the State.</p>	6-91	6.2.5			
TR 21	Technical	Function	The Contractor shall provide a Portal/Mobile App with intelligent, guided user navigation by presenting questions and data elements, as appropriate, from page-to-page and from question-to-question based on the relevance and applicability of subsequent questions to the responses to previous questions as entered by the user. Irrelevant or non-applicable follow-up questions shall not be presented as determined by the Consortium Counties, DHCS, CDSS, clients and advocates during joint application design.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by presenting only relevant questions and data elements from page-to-page and from question-to-question based on subsequent responses to questions as entered by the user. This is highlighted in Section 6.1.2 of our functional response in relation to dynamic questions.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by informing the applicant of the approximate amount of time to complete the application, prior to starting the application process. Additionally, our base solution includes a progress bar that shows the percentage complete as the user progresses through the application. Our solution dynamically updating the progress bar based on the dynamic nature of the question flow. For example, if the household applies for multiple programs and reports multiple sources of income, the progress bar correspondingly adjusts to reflect the added complexity and time of the application process. Our solution stores all of the fields in a configurable reference data table, allowing the framework to understand which fields are mandatory for each program. And we have a "nudge engine" that actually can help prevent common misses, oversights or encourage the users to insert non-mandatory information that will help the processing time and avoid extra case worker follow-ups.</p>	6-32 6-109	6.1.2 6.2.9			
TR 22	Technical	Function	The Contractor shall provide a Portal/Mobile App that will automatically save input data as the user moves from page to page or view to view of the application.	Y	<p><b>Deloitte meets this requirement</b> by providing the ability to save data seamlessly at the background as the user keeps working on the case data.</p> <p><b>Deloitte exceeds this requirement</b> by allowing users to save their application progress at any point in the flow, to resume unsubmitted applications, to submit the application at any point in the process (after minimum required application registration has occurred), and to navigate backward as needed to make corrections. Additionally, upon navigating out of an in-progress application, our solution prompts the user to save their changes. Our base solution automatically saves all changes with each page navigation within the flow. This is highlighted in Section 6.1.2 of our functional response in relation to application processing.</p>	6-32	6.1.2			
TR 23	Technical	Function	The Contractor shall provide a Portal/Mobile App with progress bars or other graphical representation that indicates the completeness of each page based on the number of data elements and questions answered thus far.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by providing a progress bar with a graphical representation that indicates the completeness of each page as highlighted in Section 6.1.2 of our functional response related to Navigation and Progress.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by visually depicting the entire workflow on the screen and can be navigated at will to view the various stages of the application and their status. By informing the applicant of the approximate amount of time to complete the application, prior to starting the application process will allow the user to plan their application session accordingly. Our solution can dynamically updating the progress bar based on the dynamic nature of the question flow. For example, if the household applies for multiple programs and reports multiple sources of income, the progress bar correspondingly adjusts to reflect the added complexity and time of the application process.</p> <p>Additional potential services that could be requested: Deloitte could look at historical data with time stamps to provide and average and estimated time of completion, which could allow the user to plan their time in front of the computer.</p>	6-32, 6-35	6.1.2			

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TR 24	Technical	Function	The Contractor shall provide a Portal/Mobile App with flexible navigation to pages/views of the application by allowing the user to return to any page/view of the application for editing, restart the application from any point, or skip to other pages/views of the application.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by visually depicting the entire workflow on the screen and can be navigated at will to view the various stages of the application and their status, as highlighted in Section 6.1.2 of our functional response related to Navigation and Progress.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by allowing users to save their application progress at any point in the flow, to resume unsubmitted applications, to submit the application at any point in the process (after minimum required application registration has occurred), and to navigate backward as needed to make corrections. Additionally, upon navigating out of an in-progress application, our solution prompts the user to save their changes. Our base solution automatically saves all changes with each page navigation within the flow.</p>	6-32	6.1.2			
TR 25	Technical	Audit Logs	The Contractor shall collect and store the IP address for all new application submissions.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by storing in its logs the IP address for applications submitted in the relational database. The AWS firewall shall also log and collect the IP addresses accessing the application. Also, our base solution shall store the IP addresses for applications submitted in application logs in the relational database</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by storing in its solution logs IP addresses for all transactions that take place within the application. Deloitte has a dedicated security practice within our firm and team which can assist with any security incident that can help analyze this information.</p>	6-115	6.2.10			
TR 26	Technical	Regulatory	The Contractor shall follow the noticing requirements outlined in Government Code Section 11015.5 to inform clients that their IP information will be captured and stored for future use.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by having the UI will show appropriate text to inform client that their data will be stored securely for future use and by complying with First 5 CA's policies around</p> <ul style="list-style-type: none"> <li>- Information Collected and How it is Used</li> <li>- What Happens to Information You Submit to Us</li> <li>- Order Forms</li> <li>- Public Disclosure</li> <li>- Personal Information</li> <li>- Automatic Collection of Information/Cookies</li> </ul>	6-113	6.2.10			
TR 27	Technical	API	The Contractor shall add the ability to interface with CalSAWS to provide the portal users with the client data in real-time.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by providing client data from CalSAWS to portal users in real-time. Our API gateway design seamlessly integrates with the different application components to offer an excellent and consistent experience through a best of breed user interface that is easy to navigate and maximizes productivity with automated workflows and features, such as running customized recommendations, or linking an application/form data to a case in CalSAWS for processing.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by provided the last "update date/time" which signals to the user if for some reason, the CalSAWS worker portal is down</p>	6-87	6.2.4			
TR 28	Technical	API	The Contractor shall add the ability to link an application/form data to a case in CalSAWS for processing.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by utilizing and integrating with the existing application/form transfer API to transfer data the CalSAWS staging tables for use in the existing linking processes such as person clearance and case clearance. Updates to the existing API and SSP staging tables needed to support new application/form data will be made by working with the Consortium and CalSAWS vendor.</p>	6-87	6.2.4			
IN 1	Interface	API	The Contractor shall provide a Portal/Mobile App that supports a two-way real-time API with CalSAWS.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by supporting two-way, real-time APIs with CalSAWS. Our solution accelerator's suite of independently deployable, small, modular services enables each service to run unique processes and communicate through a well-defined Representational State Transfer (REST) microservice. Our solution is based on the concept of API First which is an important aspect of building cloud native or cloud first applications.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> as the service gateway provides each kind of client with a specific API – this reduces the number of round trips between the client and application. The exchange of timely, accurate data via interface real-time APIs is the lifeblood of any modern enterprise. This necessitates close coordination between Portal/Mobile App Project and its business partners to preserve an uninterrupted flow of data that supports the business processes of the program. Knowing the State, the Eligibility business, and the systems involved, we understand when you have a real time data need and when you shouldn't to avoid over-engineering without a business purpose</p>	6-87	6.2.4			

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IN 2	Interface	API	The Contractor shall provide a Portal/Mobile App that receives and processes Consortium-specified case and person data from CalSAWS through a real-time interface based on a trigger condition to be determined by the Consortium, Counties, DHCS and CDSS during joint application design.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> using its experience as the leader in the Eligibility and Enrollment (E&amp;E) market. We understand how to integrate data between core IE systems like SAWS and its auxiliary systems like Portal and Mobile Apps. We will utilize the experience to build and fine tune our interface repository, business rules catalog, processes, and tools to exchange case and person data with CalSAWS based on conditions determine with your stakeholders. The result is a comprehensive approach to interface requirements, design, architecture, delivery, and ongoing operations and enhancements, through a highly decoupled API based design to allow new capabilities to be individually scaled and controlled by trigger conditions like file transfers and service pooling.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> as Deloitte has delivered 25 E&amp;E SSPs across the nation so we know the integration required between SSP and worker portals and the many other 3rd party interface, so we can take those design specifications, lessons learned and architecture design which lowers the risk of delivery.</p>	6-87	6.2.4			
IN 3	Interface	Error Reporting	The Contractor shall provide a Portal/Mobile App that shall notify the user of any data discrepancy or errors in the transmission of data between CalSAWS, delineating specific interface discrepancies or errors.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> through the exception and error handling mechanism for interfaces, batches, and applications will be handled at the application level along with logging. Our React framework handles errors using best practices like error boundaries, which isolate the various parts of the app and handle errors locally. This effort lets users handle data entry errors from the page, including inappropriate data types, formats, or syntax for each data field. If there are issues with the interface between CalSAWS and the Portal/Mobile application, the application visually and auditorily alerts the user of such errors immediately before and after service in the Portal/Mobile App for incorrect data types, formats, or syntax and displays a generic and friendly Error UI instead of the component tree that crashed. We validate all inputs server-side regardless of whether or not we check client-side</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> through interface component which gracefully handles service failure due to errors in data or transmission by notifying the user and logging the errors in the system using AWS services to store the error logs in DB and put the backups in S3 also set the necessary alerts for error reporting using AWS Lambda and cloud monitoring. Our solution also uses LogRocket to capture user activity along with console logs, JavaScript errors, network requests, and browser metadata. LogRocket shows the most impactful errors on the portal, and how to reproduce them without asking for screenshots or logs</p>	6-101	6.2.6			
IN 4	Interface	Audit Logs	The Contractor shall provide a Portal/Mobile App that will track and maintain a history of all interface activity and information.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a real time interface visually view errors immediately before and after service in the Portal/Mobile Application for incorrect data types, formats, or syntax. Our solution accelerator interface component tracks and gracefully handles service failure due to errors in data or transmission by notifying the user and logging the errors in the system using AWS services to store the error logs in DB and put the backups in S3 also set the necessary alerts for error reporting using AWS Lambda and cloud monitoring	6-101	6.2.6			
IN 5	Interface	Architecture	The Contractor shall provide a Portal/Mobile App user interface that employs input controls to prevent data entry errors, including inappropriate data types, formats or syntax, for each data field and shall visually and auditorily alert the user of such errors immediately.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> through our solution accelerator. Our React framework handles errors using best practices like error boundaries which isolates the various parts of the app and handles errors locally providing ability to handle data entry errors from the page, including inappropriate data types, formats, or syntax for each data field. The real time interface visually and auditorily alert the user of such errors immediately before and after service in the Portal/Mobile Application for incorrect data types, formats, or syntax and display a generic and friendly Error UI instead of the component tree that crashed. We validate all inputs server-side regardless of whether or not we check client-side.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> through our solution accelerator interface component which gracefully handles service failure due to errors in data or transmission by notifying the user and logging the errors in the system using AWS services to store the error logs in DB and put the backups in S3 also set the necessary alerts for error reporting using AWS Lambda and cloud monitoring. Plus, our solution provides a "nudge engine" which allows prompts to the user to nudge them to providing better and more accurate data, in hope of reducing their eligibility processing time and reducing case worker follow-up tasks.</p>	6-101	6.2.6			



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SC 1	Security	Regulatory	The Contractor shall warrant that all Portal/Mobile App data will be encrypted in transmission and at rest, including via web interface, APIs, using Transport Layer Security (TLS) version 1.2 or equivalent and in storage at a level equivalent to or stronger than Advanced Encryption Standard (AES-128) 128-bit level encryption.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> as all data exchange in NextGen WorkPath uses Hypertext Transfer Protocol (HTTP) over Transport Layer Security (TLS) version 1.2 to protect the privacy and integrity of data in transit through bidirectional encryption of communications between the cloud servers and the web browsers, including secure access via the Internet and government network infrastructures for authorized users. The solution provides security and privacy of communications using the relevant security standards and deploys appropriate measures to prevent the confidentiality and authenticity of the messages. The data encryption keys to encrypt locally within the solution at a level equivalent to or stronger than Advanced Encryption Standard (AES-128) 128-bit level encryption.</p> <p><b>Deloitte Digital's solution exceeds the requirement</b> by leveraging AWS Key Management System (KMS) to manage the keys used to encrypt data at rest across all supported services like Elastic Block Storage (EBS), Simple Storage Service (S3) etc. AWS KMS uses hardware security modules (HSMs) that is FIPS 140-2 compliant, validated to generate and protect keys. KMS keys are never shared outside the AWS region in which they were created.</p>	6-118	6.2.10			
SC 2	Security	Standards	The Contractor shall provide a Portal/Mobile App that utilizes OAuth2 to authorize with backend APIs.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by using the following tools to authorize API calls: - Amazon Cognito provides user authentication for the Portal/Mobile App</p> <p>- Utilizes industry standard SAML protocol to provide federation capabilities.</p>	6-79	6.2.1			
SC 3	Security	Security Matrix	The Contractor shall provide a Portal/Mobile App that enforces role-based security protocols with page-level security rights to view, enter or change data based on respective domain of control and authority of the user, which considers agency, county, office, business unit, scope of role, responsibilities, and other parameters as defined by the Consortium or proposed by the Contractor.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by providing a role-based security authorization model that fulfills the need to provide appropriate levels of system access to external and internal users. User roles allow different levels of access to specific pages to support encapsulated business processes. The roles' maps to specific functions, allowing individual access to the workflows, and screens, necessary for users to support their business needs.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> through our solution accelerator that is shipped with Out-Of-The-Box (OOTB) role-based security model. These pre-defined user roles and attributes can be leveraged during the configuration of access rights rules.</p>	6-84	6.2.2			
SC 4	Security	Security Matrix	The Contractor shall provide a Portal/Mobile App that maintains the organizational structure of agencies, counties, offices, business units, supervisors and case managers of Portal/Mobile as well as maintain reporting relationship between entities and users, for role-based security administration by Consortium-specified user administrators and for the construction of dashboards and reports.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> through the user roles that are easily configurable by authorized system administrators who can create a new role and assign different levels of access by the assignment of one or more security roles, taking into consideration the principle of least privilege. The role-based security authorization model fulfills the need to provide appropriate levels of system access to County and Consortium staff to perform their administrative duties such as manage CBO accounts (approve, activate, deactivate) and manage CBO/FBO reference data.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> as the authority to maintain and alter data in the system is restricted to users with sufficient privileges and is based on roles granted to them based on their job duties. Roles can be set up to provide read-only access to certain data and the ability to modify other data. The authorization mechanism will not allow read-only data elements to be modified by the application even if a user tampers with an HTTP request in a manner to submit modified values of these data elements.</p>	6-84	6.2.2			
SC 5	Security	Regulatory	The Contractor shall certify that its security standards, tools, technologies, and protocols in the design, development and implementation of Portal/Mobile and the maintenance of respective data are compliant with the California Information Practices Act (Civil Code Sections 1798 et seq.).	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by our cybersecurity approach incorporating native AWS security services, and controls built into our solution to manage cybersecurity risk and meet the specifications defined in Federal, State and County security standards. Deloitte shall implement security phase gates that shall comply with security standards, tools, technologies, and protocols in the design, development and implementation and the maintenance of our solution and demonstrate compliance with the California Information Practices Act (Civil Code Sections 1798 et seq.).</p>	6-113	6.2.10			

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SC	6	Security	Regulatory	<p>The Contractor shall implement and maintain all appropriate administrative, physical, technical, and procedural safeguards that meet the standards of National Institute of Standards and Technology (NIST), including system and data protection against hacks, viruses, disabling devices, malware and other forms of malicious attacks or inadvertent acts that would improperly expose data to unauthorized individuals and/or disrupt authorized usage or access to Portal/Mobile or its data. The Contractor shall incorporate into their solutions the requirements to comply with the specifications of the following publications:</p> <p>a) NIST SP 800-53 Security and Privacy Controls for Federal Information Systems and Organizations and its related documents</p> <p>b) NIST SP 800-53A Assessing Security and Privacy Controls in Federal Information Systems and Organizations</p> <p>c) NIST FIPS Publication 199 Standards for Security Categorization of Federal Information and Information Systems</p> <p>d) NIST FIPS Publication 200 Minimum Security Requirements for Federal Information and Information Systems</p> <p>e) NIST SP 800-53 Vetting the Security of Mobile Applications</p> <p>f) NIST Cybersecurity Draft Mitigating the Risks of Software Vulnerabilities with a Secure Software Development Framework SSDF</p> <p>g) NIST SP 800-160 Systems Security Engineering – Approach in the Engineering of Trustworthy Secure</p>	Y	<p><b>Deloitte Digital's solution meets this requirement</b> through our cybersecurity approach that incorporates native AWS security services, and controls built into our solution to manage cybersecurity risk and meet the specifications defined in Federal, State and County security standards. Deloitte's approach to securing the solution includes administrative, technical, and procedural controls from the Deloitte Security and Risk Framework. This extensible framework incorporates requirements from industry standards, and regulatory, Federal, State and County-based data sources, including NIST 800, FIPS 199/200, California SAM 5300, and guidance from the California Department of Technology to provide a unified control set.</p> <p><b>Deloitte Digital's solution exceeds the requirement</b> as our risk framework provides a single source of applicable rationalized security and privacy controls that drive compliance activities. Deloitte shall incorporate the security controls from the list of applicable standards identified in this requirement into our Risk Framework. The rationalized set of security controls serve as a baseline set of security requirements that are modified as required for the solution. Deloitte will work collaboratively with stakeholders from the Consortium to follow a risk-based approach in implementing the security and privacy controls for the system.</p>	6-113, 6-119	6.2.10		
SC	7	Security	Access	<p>The Contractor shall provide the Consortium with direct visibility and access to Portal/Mobile Appsecurity logs, latency statistics, and other related security data.</p>	Y	<p><b>Deloitte meets this requirement</b> by enabling audit logs for all applicable AWS services supporting the solution, such as Cloud Trail Logs, Cloud Watch logs, VPC flow logs, Cloud Front logs, ELB/ALB logs, SNS, WAF, RDS, Lambda, and S3 logs. All logs will be centrally stored in an S3 bucket. The S3 bucket will be encrypted using AES 256-bit Server Side Encryption managed by AWS KMS. Further, access to the bucket itself will be restricted to applications and users to a read-only permission so that the logs are preserved and we can establish a clear trail of auditability satisfying security requirements.</p> <p><b>Deloitte exceeds this requirement</b> as our solution is designed using standard APIs, native AWS log sources, and common formats in order to integrate with security information and event management tools for on-going threat detection, such as the security monitoring services provided through the California Department of Technology (CDT) Security Operations Center, CDSS, or Consortium security operations functions.</p>	6-86	6.2.3		
SC	8	Security	Access	<p>The Contractor shall neither copy, modify, destroy nor delete any data other than the normal operations and maintenance of Portal/Mobile App without approval and written notice by the Consortium Executive Director or his/her designee.</p>	Y	<p><b>Deloitte Digital's solution meets this requirement</b> as the authority to maintain and alter data in the system is restricted to users with sufficient privileges and is based on roles granted to them. Roles can be set up in the solution to provide read-only access to certain data and the ability to modify other data.</p> <p><b>Deloitte Digital's solution exceeds the requirement</b> as access to confidential information shall be restricted on need-to know basis and principle of least privileges. Different security roles shall be setup to provide varying degree of access to employees, contractors and subcontractors based on their job responsibilities. Access controls shall be implemented to restrict any unauthorized update, transfer and deletion of any data other than the normal operations and maintenance of Portal/Mobile App without approval from the stakeholders.</p>	6-86	6.2.3		
SC	9	Security	Access	<p>The Contractor shall provide access to Portal/Mobile App data to only those employees, Contractors and subcontractor's who need access such data in order to fulfill Contractor's obligations under this Agreement and ensure the appropriate level of access based on their roles and sensitivity of datasets as approved by the Consortium, Counties, DHCS and CDSS.</p>	Y	<p><b>Deloitte Digital's solution meets this requirement</b> as user roles shall be setup in our solution to allow different levels of access to specific pages to support encapsulated business processes. The roles' maps to specific functions, allowing individual access to the workflows, and screens, necessary for users to support their business needs.</p>	6-86	6.2.3		

# REQUIREMENTS CROSS-REFERENCE MATRIX

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SC 10	Security	Access	The Contractor shall ensure that all individuals who perform work under this Agreement have: a) undergone and passed criminal background screenings; b) possess all the qualifications and competencies appropriate for the roles and responsibilities of such individuals; and c) certified their understanding and agreement with security and confidentiality terms and conditions set forth by the Consortium, prior to gaining access to project tools, software code, deliverables, data, or artifacts of Mobile/Portal.	Y	<b>Deloitte Digital's solution meets this requirement</b> by proposing only personnel who have undergone and passed criminal background screenings as required by CalSAWS security policy part of this engagement. Deloitte shall develop and deliver Confidential Information onboarding training that outlines the protocols that team members must follow when accessing, storing, using, transferring, and disposing of Confidential Information. Additionally, Deloitte shall enforce following protocols to maintain the confidentiality of CalSAWS Portal/Mobile App data. Deloitte has a strong security practice, and as part of our staffing we have included Security Advisory personnel who are highly qualified and certified for their roles on the project.	6-86	6.2.3			
SC 11	Security	Access	The Contractor shall provide a Portal/Mobile App that will end the online session after xx (to be defined) minutes of user inactivity and shall warn the user one (1) minute prior to ending such session.	Y	<b>Deloitte Digital's solution meets this requirement</b> as our base solution provides session management, terminating user sessions if the user is inactive for a defined period of inactivity and ignores the warning message sent a minute prior.	6-86	6.2.3			
SC 12	Security	Security Matrix	The Contractor shall provide a Portal/Mobile App that supports varying levels of access depending on the organizational hierarchy: DHCS and CDSS, Consortia, County, Region, and FBO/CBO.	Y	<b>Deloitte Digital's solution meets this requirement</b> through a flexible, granular, role-based access control model that provides the ability to create custom roles with varying levels of access depending on factors such as organizational hierarchy or location, and provide restrictions on a page-level basis offered by our solution.	6-84	6.2.2			
SC 13	Security	Account Mgmt	The Contractor shall provide a Portal/Mobile App that creates an account for each user. <b>Use of a valid email address for account creation is optional.</b>	Y	<b>Deloitte Digital's solution meets this requirement</b> by implementing a flexible and extensible authentication and authorization model. Our solution will enable the application users to self-register via the web-based application. During the user registration process, each user is required to create a user account with a valid email address. Our solution has native support for basic username and password authentication. Appropriate security controls will be put in place to validate and verify the user identity. Email address is not required and is optional. Our Portal/Mobile App solution accelerator collects the information provided by the application users during registration and provisions the user to the Amazon Cognito User Pool hosted in AWS Cloud.  <b>Deloitte Digital's solution exceeds the requirement</b> as it is extensible to support SAML or integrate with other identity services, using standard protocols.	6-82	6.2.1			
<del>SC 14</del>	<del>Security</del>	<del>Account Mgmt</del>	<del>The Contractor shall provide a Portal/Mobile App that creates an account for each user. Use of a valid email address for account creation is optional.</del>	N/A	1/10/20 - Requirement removed based on Addendum 3 that has been posted	N/A	N/A			
SC 15	Security	Account Mgmt	The Contractor shall provide a Portal/Mobile App that requires unique usernames and passwords.	Y	<b>Deloitte Digital's solution meets this requirement</b> as the application users including Residents, CBOs, FBOs and County workers shall be required to create unique username and passwords to access the solution.	6-82	6.2.1			
SC 16	Security	Account Mgmt	The Contractor shall provide a Portal/Mobile App that provides MFA and/or Faceld (if supported by device).	Y	<b>Deloitte Digital's solution meets this requirement</b> as our base solution shall be integrated with Google Authenticator to provide multi-factor authentication capabilities.	6-79	6.2.1			
SC 17	Security	Account Mgmt	The Contractor shall provide a Portal/Mobile App that allows users to reset their own passwords using industry standard two-step verification process.	Y	<b>Deloitte Digital's solution meets this requirement</b> as our solution's native authentication functions support new password creation and two-step verification processes for password reset self-service. Amazon Cognito shall be integrated with Amazon Simple Email Service (SES) to send notification emails to verify users before resetting their password.	6-79, 6-82	6.2.1			
SC 18	Security	Audit Logs	The Contractor shall provide a Portal/Mobile App that maintains an audit log for Consortium and County administrators to access.	Y	<b>Deloitte Digital's solution meets this requirement</b> by enabling and reviewing logs for all applicable AWS services supporting NextGen360, such as Cloud Trail Logs, Cloud Watch logs, VPC flow logs, Cloud Front logs, ELB/ALB logs, SNS, WAF, RDS, Lambda, and S3 logs. All logs will be centrally stored in an S3 bucket.  <b>Deloitte Digital's solution exceeds the requirement</b> by having the S3 bucket encrypted using AES 256-bit Server Side Encryption managed by AWS KMS. Further, access to the bucket itself will be restricted to applications and users to a read-only permission so that the logs are preserved and we can establish a clear trail of auditability satisfying security requirements.	6-101	6.2.6			

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SC 19	Security	Security Matrix	The Contractor shall create a security matrix to define Portal/Mobile App user roles.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> through the creation of a security matrix that shall capture the role-based security permissions to be configured within the our solution accelerator based on our prior experience of implementing similar solutions. This approach shall serve as an accelerator to enable timely and accurate provisioning of user roles with appropriate privileges based on user job duties.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> as our base solution comes with security matrix with OOTB roles and privileges. The security matrix shall be refined and updated based on Consortium stakeholder needs, employing principle of least privileges and segregation of duties before provisioning various user roles in our solution accelerator.</p>	6-85	6.2.2			
SC 20	Security	Account Mgmt	The Contractor shall ensure Captcha (or similar) functionality is leveraged to provide an additional layer of application security.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> as our base solution shall offer Captcha (or similar) functionality to provide additional layer of application security.</p>	6-79	6.2.1			
SC 21	Security	Federal and State Section 508 Legislation	The Contractor shall, in agreement with the Consortium, adhere to all Federal and State requirements for developing accessible web applications, California Government Code:	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by providing a base solution compliant with Title II of the Americans with Disabilities Act (ADA), Section 508 of the Rehabilitation Act of 1973 and CDSS Regulations Section 21-115 Provision for Services to Applicants and Recipients Who are Non-English Speaking or Who Have Disabilities.</p> <p><b>Deloitte Digital's solution exceeds the requirement</b> by bringing our solution accelerator framework, which incorporates Federal and State Standards upfront, as defined within the Digital.gov Requirements for Federal Websites. Our accelerator and patterns will also adhere to the Digital Services including a number of features that facilitate quick, efficient, and accurate ongoing case management for Residents, CBO and county workers with disabilities. Disability beyond just sight and hearing, but maybe with use of the mouse.</p>	6-106	6.2.8			
SC 22	Security	Federal and State Section 508 Legislation	The Contractor shall provide a WCAG accessibility conformance report and obtain signed certification for WCAG 2.0 compliance (NEW CALIFORNIA LAW EFFECTIVE JULY 1, 2019) – SEE EXAMPLE FOR California DoE: <a href="https://www.cde.ca.gov/re/di/ws/documents/webcertfor m2018.pdf">https://www.cde.ca.gov/re/di/ws/documents/webcertfor m2018.pdf</a> Digital.gov Requirements for Federal Websites and Digital Services	Y	<p><b>Deloitte Digital's solution meets this requirement</b> and our response is in the detail table in the doc mentioning each feature area.</p> <p><b>Deloitte Digital's solution exceeds the requirement</b> by bringing our solution accelerator framework, which incorporates Federal and State Standards upfront, as defined within the Digital.gov Requirements for Federal Websites. Our accelerator and patterns will also adhere to the Digital Services including a number of features that facilitate quick, efficient, and accurate ongoing case management for Residents, CBO and county workers with disabilities. Disability beyond just sight and hearing, but maybe with use of the mouse.</p>	6-106	6.2.8			
SC 23	Security	Federal and State Section 508 Legislation	The Contractor shall comply with the accessibility requirements of Section 508 Law and Technical Standards (code: <a href="https://leginfo.ca.gov/faces/codes_displayText.xhtml?lawCode=GOV&amp;division=7.&amp;title=1.&amp;part=&amp;chapter=18.1.&amp;article=">https://leginfo.ca.gov/faces/codes_displayText.xhtml?lawCode=GOV&amp;division=7.&amp;title=1.&amp;part=&amp;chapter=18.1.&amp;article=</a> )	Y	<p><b>Deloitte Digital's solution meets this requirement</b> and our response is in the detail table in the doc mentioning each feature area</p> <p><b>Deloitte Digital's solution exceeds the requirement</b> by bringing our solution accelerator framework, which incorporates Federal and State Standards upfront, as defined within the Digital.gov Requirements for Federal Websites. Our accelerator and patterns will also adhere to the Digital Services including a number of features that facilitate quick, efficient, and accurate ongoing case management for Residents, CBO and county workers with disabilities. Disability beyond just sight and hearing, but maybe with use of the mouse.</p>	6-106	6.2.8			
SC 24	Security	Federal and State Section 508 Legislation	The Contractor shall, in agreement with the Consortium, incorporate Federal and State Standards as defined within the Digital.gov Requirements for Federal Websites and Digital Services.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> and our response is in the detail table in the doc mentioning each feature area.</p> <p><b>Deloitte Digital's solution exceeds the requirement</b> by bringing our solution accelerator framework, which incorporates Federal and State Standards upfront, as defined within the Digital.gov Requirements for Federal Websites. Our accelerator and patterns will also adhere to the Digital Services including a number of features that facilitate quick, efficient, and accurate ongoing case management for Residents, CBO and county workers with disabilities. Disability beyond just sight and hearing, but maybe with use of the mouse.</p>	6-106	6.2.8			
SC 25	Security	State Security	The Contractor must adhere to, as directed by the Consortium, State Administrative Manual (SAM) Chapter 5300 Information Technology Office of Information Security.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by complying with State Administrative Manual (SAM) Chapter 5300 Information Technology Office of Information Security, by leveraging our deep knowledge of California's security standards to build a solution with the required security controls as detailed in our narrative response.</p>	6-113	6.2.10			

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REQ#	Category	Sub-category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment	
SC 26	Security	State Security	The Contractor shall, in agreement with the Consortium, incorporate California Department of Technology Secure Coding Practices.	Y	<p><b>Deloitte Digital's solution meets this requirement by implementing</b> California Department of Technology Secure Coding Practices and synthesize some of the key practices for effective coding which shall be diligently followed by the developers of the proposed solution. We understand how important following effective coding practices is in running multiple complex customized components smoothly on day-to-day basis. Deloitte implement stringent code reviews across the development phase of the project to ensure secure coding practices are adhered.</p>	6-119	6.2.10			
SC 27	Security	State Security	The Contractor shall, in agreement with the Consortium, adhere to all California Department of Technology Office of Information Security Web Application Vulnerability Recommended Mitigation Strategies.	Y	<p><b>Deloitte Digital's solution meets this requirement by adhering to</b> all of the recommended mitigation strategies for web application vulnerabilities, in agreement with the Consortium and California Department of Technology Office of Information Security. Prior to releasing the system to production, Deloitte will work with Consortium stakeholders to factor the solution's security readiness into go-live decisions. These decisions will be informed by the security requirements and controls framework that our team will develop during development and implementation. Our proposed security testing activities shall help identify security risks/threats early in the process and which can then be assessed, measured, and mitigated, and help comply with California Department of Technology Office of Information Security Web Application Vulnerability Recommended Mitigation Strategies.</p> <p><b>Deloitte Digital's solution exceeds the requirement</b> by supplementing this with our production proven mitigation strategies based on OWASP. The process incorporates Static Application Security Testing (SAST), Dynamic Application Security Testing (DAST) and infrastructure vulnerability scans to identify, assess, and remediate risks/threats before the solution is deployed in the production environment against Open Web Application Security Project (OWASP) standards.</p>	6-119	6.2.10			
SC 28	Security	Program Privacy and Security	The Contractor shall, in agreement with the Consortium, adhere to all CalSAWS Privacy and Security Requirements, derived from laws, Executive Orders, directives, policies, regulations, organizational (mission) needs and flow down agreement.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by implementing Deloitte's Security and Risk Framework that shall incorporate requirements from industry standards, regulatory, Federal, State and County-based data sources that are applicable to CalSAWS operations and shall provide a single source of applicable rationalized security and privacy requirements that are to be implemented for secure the end-end operations of the proposed solution.</p> <p><b>Deloitte Digital's solution exceeds the requirement</b> as our risk framework provides a single source of applicable rationalized security and privacy controls that drive compliance activities. Deloitte shall incorporate the security controls from the list of applicable standards identified in this requirement into our Risk Framework. The rationalized set of security controls serve as a baseline set of security requirements that are modified as required for the solution. Deloitte will work collaboratively with stakeholders from the Consortium to follow a risk-based approach in implementing the security and privacy controls for the system.</p>	6-113	6.2.10			

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Phase 1 - DD&I Functional					Contractor Response				For Consortium Use Only	
REQ#	Category	Sub-category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment	
FN 1	Functional	Home Page	The Contractor shall create two types of announcements to be displayed for Portal users once they are logged in on the home page: - Allow the 58 Counties to enter county specific announcements via security controlled by the county. - Allow the project to enter statewide announcements via security controlled by the Consortium.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability for homepage announcements to be created per user roles and county designations. Counties will have security-controlled access to post their own announcements, which will be displayed to logged in users located within that County as well as any unauthenticated user that is determined to be located in the county via a zipcode lookup (if entered by the user). State users with security-controlled access will also have the ability to send out statewide announcements that can be shown to all users regardless of County association and regardless of logged in status.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing both County and statewide announcements to be tailored and configured to display for certain groups of users. Announcements can be displayed to groups of users based on user type (client vs. CBO).	6-50, 6-51	6.1.5			
FN 2	Functional	Regulatory	The Contractor shall design, build, deploy and maintain the CalSAWS web Portal user interface (UI) in compliance with Title II of the American Disability Act (ADA), Section 508 of the Rehabilitation Act of 1973 and CDSS Regulations Section 21-115 Provision for Services to Applicants and Recipients Who are Non-English Speaking or Who Have Disabilities.	Y	<b>Deloitte Digital's solution meets this requirement</b> by complying with Title II of the American Disability Act (ADA), Section 508 of the Rehabilitation Act of 1973 and CDSS Regulations Section 21-115 Provision for Services to Applicants and Recipients Who are Non-English Speaking or Who Have Disabilities. We perform rigorous testing of our user interface during the development life cycle to confirm that any changes to the user interface design meet all regulatory compliance standards, and we confirm compliance using software like JAWS, configured with an industry standard set of rules. Our accessibility rules include, but are not limited to: checks for keyboard accessibility, explicit labeling of form inputs, alt attributes for images, sufficient color contrast, tagged multimedia including captioning, logical tab order, table attributes for headings and columns, contextual links, descriptive page titles, "skip navigation links" that permit efficient navigation for screen readers, and use of ARIA tags.  <b>Deloitte Digital's solution exceeds this requirement</b> by adopting best practices and implementing design patterns and a coding framework that help enforce the ADA compliance up front, rather than waiting to conduct testing with screen-readers and text-only browsers, and performing compliance-focused code reviews during UAT. We have "accessibility champions" within the firm that help the project team understand that this compliance is not just with folks with sight or hearing challenges, but with others (e.g., those who cannot use a mouse and need "hot keys" to navigate the site).	6-54	6.1.5			
FN 3	Functional	Design	The Contractor shall develop, and deliver a process that will ensure UCD leveraging industry standards and best practices for architecture and UI design templates. The process must include the engagement of Consortium, state, county staff, stakeholders, advocates and clients.	Y	<b>Deloitte Digital's solution meets this requirement</b> by aligning with the Consortium PCD and incorporating our Elevating the Human eXperience (EHX) method. Deloitte will plan and manage inclusion of all stakeholders, including the current DD&I Contractor, as well as additional groups such as Quality Assurance and IV&V, outside of the core team. Deloitte will help ensure all groups feel involved and consulted throughout project. This approach leads to less issues of scope, approach, and direction for the new Portal/Mobile App system. As part of the EHX method, we emphasize the need to coordinate with all stakeholders on aspects of the SSP/Mobile Project, including status, accomplishments, and schedule.  <b>Deloitte Digital's solution exceeds this requirement</b> by focusing on streamlining a robust UCD process to engage Consortium, County, and State staff, advocates, and clients. This will include detailed drawings (prototypes) of key application pages and unique components that depict how content and functionality will be arranged at the page level. During this process, we work closely with CalSAWS stakeholders on the layout of specific types of pages and the priority of content, page-level interactions, and navigation schemas to optimize the user experience. Increase in user adoption to our Portal/Mobile App will be our key goal. However, because we know the Eligibility process and realize a change on the front-end experience may have a drastic impact on the backend case workers, we make sure to look at the end-to-end process rather than just isolating to the Portal/Mobile App solution.	5-50 6-25	5.2.1 6.1			
FN 4	Functional	Languages	The Contractor shall design, build, deploy and maintain the CalSAWS Portal application, including help features, in California Department of Social Services (CDSS) the state approved threshold languages including English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Hmong, Korean, Lao, Mandarin (Chinese), Portuguese, Russian, Tagalog and Vietnamese.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability to toggle between languages. Language toggle will be available on all pages of the application in the top navigation bar. Understanding that some languages require multibyte character support. Some languages require more space to display (e.g., Spanish expands text strings ~25%), and some languages actually read right to left.  <b>Deloitte Digital's solution exceeds this requirement</b> by remembering a users's preferred language so that they do not need to toggle.	6-62	6.1.9			
FN 5	Functional	Languages	The Contractor shall design, build, deploy and maintain the CalSAWS mobile application, including help features, in the state approved threshold languages including English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Hmong, Korean, Lao, Mandarin (Chinese), Portuguese, Russian, Tagalog and Vietnamese.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability to toggle between languages. Language toggle will be available on all pages of the application in the top navigation bar. Understanding that some languages require multibyte character support, they require more space to display, and some languages actually read right to left.  <b>Deloitte Digital's solution exceeds this requirement</b> by remembering a users's preferred language so that they do not need to toggle.	6-62	6.1.9			
FN 6	Functional	Help	The Contractor shall design, build, deploy and maintain the CalSAWS web Portal help features with functionality including, but not limited to hover capabilities.	Y	<b>Deloitte Digital's solution meets this requirement</b> by working with the State to design, build, and maintain help features that contains both page-level contextual help and field-level hover help. We design our hover help to be accessible on both desktop and mobile form factors to enable links to context-sensitive help for more information.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing "Alt Text" so hover text will meet Section 508 compliance, too. It allows for the ability to integrate with chatbots in a future phase to sense if a user has paused on a question for a set time. This shows that the solution can be proactive and route the user to the right type of help.	6-60	6.1.8			

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Phase 1 - DD&I Functional					Contractor Response				For Consortium Use Only	
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FN 1	Functional	Home Page	The Contractor shall create two types of announcements to be displayed for Portal users once they are logged in on the home page: - Allow the 58 Counties to enter county specific announcements via security controlled by the county. - Allow the project to enter statewide announcements via security controlled by the Consortium.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability for homepage announcements to be created per user roles and county designations. Counties will have security-controlled access to post their own announcements, which will be displayed to logged in users located within that County as well as any unauthenticated user that is determined to be located in the county via a zipcode lookup (if entered by the user). State users with security-controlled access will also have the ability to send out statewide announcements that can be shown to all users regardless of County association and regardless of logged in status.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing both County and statewide announcements to be tailored and configured to display for certain groups of users. Announcements can be displayed to groups of users based on user type (client vs. CBO).	6-50, 6-51	6.1.5			
FN 7	Functional	CBO Access	The Contractor shall configure security rights for counties to opt in or out of the ability to allow their CBO/FBO organization to manage their own contact and location information, as well as their Agency Assistor Access to the Portal.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing security configurations at the County-by-County level for each County to enable or disable the ability for their CBOs to manage their own contact information, location information, and individual assistor access. Access to this feature will be controlled by security privileges granted through the system administration function.  <b>Deloitte Digital's solution exceeds this requirement</b> by also providing security configurations at the CBO-by-CBO level within each County, so that Counties can choose which of their CBOs can manage their own information and assistor access. This extra level of configuration allows the Counties to tailor the security rights according to the needs of each specific CBO.	6-46	6.1.4			
FN 8	Functional	CBO Access	The Contractor shall configure the ability for county authorized CBO/FBO to create, update, save, submit applications and message county staff on a customers behalf consistent with CDSS/DHCS policy.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing CBOs to initiate applications, save and continue at a later time, update applications, and submit applications from the CBO portal. A communication channel is provided in the accelerator to send messages to County staff related to the application.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing a client-centered approach to managing applications. The applications on the dashboard are organized by client/family, and key information for the client is displayed clearly to help the CBO identify their applications. Messages sent to County staff are automatically sent with relevant metadata and context so that the staff person has all the information needed to answer the question.  <b>Additional potential services that could be requested:</b> Deloitte has an Alliance with Apple, allowing us to provide an Enterprise Design Lab (EDL) on the Apple Cupertino campus to focus on potential tablet views for CBOs to perform "clienttelling" work on tablets with the applicants. We could think through disconnected mode so CBOs in rural areas with limited internet access can also provide a similar level of service.	6-46	6.1.4			
FN 9	Functional	CBO Access	The Contractor shall configure the ability for county authorized CBO/FBO to save and return to an application that is in progress and complete the application to submit that application for one year. After one year, all pending, unsubmitted applications will be purged from the Portal.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing CBOs to save and continue applications at a later time from the CBO portal. The system can be configured to purge any unsubmitted applications after one year.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing a brief, easily digestible summary of the application information entered thus far before continuing the application, which allows different assistors to continue applications knowing the full context of the family's situation so they can better assist them. The purge logic for unsubmitted applications is flexible and easily configurable, making it easy to adapt to changes in policy over time.	6-46	6.1.4			
FN 10	Functional	CBO Access	The Contractor shall configure the ability for county authorized CBO/FBO to complete multiple applications in a single session.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing CBOs to work on multiple applications in a single session through a tabular, easily navigable layout.  <b>Deloitte Digital's solution exceeds this requirement</b> by taking a client-centered approach to the display and organization of these applications. Key client information such as name, address, and DOB are displayed in the tabular navigation and at the top of each application page to make it easier for assistors to visually recognize applications as they manage their workload.  <b>Additional potential services that could be requested:</b> Deloitte has an Alliance with Apple, allowing us to provide an Enterprise Design Lab (EDL) on the Apple Cupertino campus to focus on potential tablet views for CBOs to perform "clienttelling" work on tablets with the applicants. We could think through disconnected mode so CBOs in rural areas with limited internet access can also provide a similar level of service.	6-46	6.1.4			
FN 11	Functional	CBO Access	The Contractor shall build a Dashboard with functionality, consistent with CDSS and DHCS policy, for county authorized CBO/FBO staff to view, in real time, applications that are saved and/or submitted from their agency, including the status of the application, case number (once assigned), verification requests, eNOAs, benefit award, submit month and program(s) status for all the client applied for, termination reasons, sanction reasons, upcoming SAR7 and Renewal Due dates. The CBO/FBO dashboard will have the ability for the CBO/user to download their activity (i.e., applications assisted and the client demographics, dates, app outcomes, etc., within defined timeframes).	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing dashboards that can be configured with all of the information mentioned in the requirement. NextGen dashboards provide export and reporting capabilities that allow the user to filter criteria by any of the column values mentioned and by timeframe. Dashboards can be customized to the user's role (e.g., for staff to see only their items and for managers to see everything for the CBO).  <b>Deloitte Digital's solution exceeds this requirement</b> by providing search and filter capabilities within the dashboard itself, allowing CBO staff to more quickly find the information they're looking for.  <b>Additional potential services that could be requested:</b> Deloitte has an Alliance with Apple, allowing us to provide an Enterprise Design Lab (EDL) on the Apple Cupertino campus to focus on potential tablet views for CBOs to perform "clienttelling" work on tablets with the applicants. We could think through disconnected mode so CBOs in rural areas with limited internet access can also provide a similar level of service.	6-46	6.1.4			



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Phase 1 - DD&I Functional					Contractor Response				For Consortium Use Only	
REQ#	Category	Sub-category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment	
FN 1	Functional	Home Page	The Contractor shall create two types of announcements to be displayed for Portal users once they are logged in on the home page: - Allow the 58 Counties to enter county specific announcements via security controlled by the county. - Allow the project to enter statewide announcements via security controlled by the Consortium.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability for homepage announcements to be created per user roles and county designations. Counties will have security-controlled access to post their own announcements, which will be displayed to logged in users located within that County as well as any unauthenticated user that is determined to be located in the county via a zipcode lookup (if entered by the user). State users with security-controlled access will also have the ability to send out statewide announcements that can be shown to all users regardless of County association and regardless of logged in status.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing both County and statewide announcements to be tailored and configured to display for certain groups of users. Announcements can be displayed to groups of users based on user type (client vs. CBO).	6-50, 6-51	6.1.5			
FN 12	Functional	CBO Access	The Contractor shall build a dashboard with functionality consistent with CDSS and DHCS policy, for CBO/FBO managers to view, in real time, their agency applications that are saved and submitted, the status of the application/case, submit month, program(s) status the client applied for, the organization's assistant who submitted that application, termination reasons, sanction reasons, upcoming SAR7 and Renewal Due dates.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a CBO dashboard that authorized users will have the ability to access to review application summary and detail information specific to their CBO. The dashboard will display a list of applications and corresponding application details (i.e., status of the application, submit month, assister submitte name, program(s) status, sanction reasons, termination reasons and upcoming SAR7 and renewal due dates).  <b>Deloitte Digital's solution exceeds this requirement</b> by providing the ability to filter the records to be displayed on the dashboard by up to four filter criteria (e.g., submissions within a certain data range, submitter or program)	6-48	6.1.4			
FN 13	Functional	Application Process	The Contractor shall design, build, deploy and maintain the ability for Portal users to start, stop, save, retrieve, update and submit applications in real time and generate a PDF confirmation receipt in all languages at time of submission that will display in the client Portal dashboard.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing portal users to start, stop, save, retrieve, update, and submit applications in real-time. Additionally, our base solution generates a PDF summary and receipt at time of submission, displaying them in the client portal dashboard. The PDF summary and receipt will be generated in the language selected by the user.  <b>Deloitte Digital's solution exceeds this requirement</b> by reducing the likelihood that the customer will submit duplicate applications, reducing unnecessary processing for workers. When initiating a new application, our base solution checks to see if they've previously started or recently submitted another application. If they have an in-progress application, the customer can resume their progress instead of starting a new application. If they have recently submitted another application, they can navigate to view the current status of the existing application.	6-41	6.1.2			
FN 14	Functional	Document Upload	The Contractor shall design, build, deploy and maintain the ability for any user authorized to the case to upload documents (limited size of 8 megabytes and type) in various formats (pdf, jpeg, png, tiff, etc.) to their application(s) and cases(s) and to preview uploaded documents before submission to ensure clarity and accuracy. The Portal must accept all documents related to pending applications and existing cases, regardless of the status of the case (pending, approved, terminated) and generate/print a confirmation receipt. Portal will provide an option to the client to compress oversized files to the acceptable size for upload. Portal logic will need to convert the uploaded image to pdf format (if not already) before sending to the document repository.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a simplified and intuitive document upload feature for use by residents or authorized representatives of residents. Residents can upload proof documents as part of their initial application submission, or as supporting documentation or requested verifications to pending applications and existing cases. Residents can upload documents for their case regardless of case status.  Our solution further supports specification of the number and size of documents that a resident can upload, and supports the selection of the individual on the case for whom a document is being uploaded. Our solution also supports the upload of various document formats (e.g., pdf, jpeg, png, tiff). Once documents are uploaded, residents will have the opportunity to preview uploaded documents before submission to ensure clarity and accuracy. Upon verifying the accuracy of the documents, residents can successfully submit their documents and receive a confirmation/tracking number of the successful upload. Our solution has the capability to be customized to convert the uploaded document to pdf format before sending to the State's document repository. Also, the portal can compress certain types of selected files prior to uploading (e.g. jpeg) to improve network performance of the upload process and avoid exceeding the 8MB file size limit. Additionally, the solution provides a document upload history view for residents to view documents they have previously uploaded for their case.  <b>Deloitte Digital's solution exceeds this requirement</b> by having the capability to integrate to our SmartBox service (SaaS charge) or to the existing Hyland document center solution, and taking advantage of OCR/ICR technologies that allow for document classification and data extraction.	6-55	6.1.6			
FN 15	Functional	Application Process	The Contractor shall build the ability to allow users to apply for Medi-Cal, CalFresh, Disaster CalFresh, CalWORKs, CAPI and CMSP programs.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing users to apply for Medi-Cal, CalFresh, Disaster CalFresh, CalWORKs, CAPI, and CMSP programs.  <b>Deloitte Digital's solution exceeds this requirement</b> by using a framework and flexible data model that supports adding additional programs without requiring major refactoring. Furthermore, our framework can dynamically display only the relevant questions based on the mix of programs the user is applying for.	6-32, 6-34	6.1.2			
FN 16	Functional	Application Process	The Contractor shall build the ability to apply for county General Assistance/General Relief and the configurability to opt-in by county.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing users to apply for County General Assistance/General Relief in the Counties that have opted-in through the configurable capability.  <b>Deloitte Digital's solution exceeds this requirement</b> by storing the County configuration in reference data that can be easily updated through an administration user interface.	6-32, 6-34	6.1.2			



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FN 1	Functional	Home Page	The Contractor shall create two types of announcements to be displayed for Portal users once they are logged in on the home page: - Allow the 58 Counties to enter county specific announcements via security controlled by the county. - Allow the project to enter statewide announcements via security controlled by the Consortium.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability for homepage announcements to be created per user roles and county designations. Counties will have security-controlled access to post their own announcements, which will be displayed to logged in users located within that County as well as any unauthenticated user that is determined to be located in the county via a zipcode lookup (if entered by the user). State users with security-controlled access will also have the ability to send out statewide announcements that can be shown to all users regardless of County association and regardless of logged in status.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing both County and statewide announcements to be tailored and configured to display for certain groups of users. Announcements can be displayed to groups of users based on user type (client vs. CBO).	6-50, 6-51	6.1.5			
FN 17	Functional	Application Process	The Contractor shall ensure that the Portal allows for applications submitted through the Portal to be evaluated for CalWORKs Immediate Need or Expedited Services for CalFresh within program processing timeframes.	Y	<b>Deloitte Digital's solution meets this requirement</b> by evaluating all applications that have applied for CalWORKs and CalFresh against the criteria for Immediate Need and Expedited Services, respectively.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing two options: 1) For applications that the customer completes end-to-end, the evaluation will be done automatically based on the information entered by the user in the application. 2) For applications that are submitted prior to completion, the user will be prompted to complete an optional short screening to determine their eligibility for Immediate Need or Expedited Services (because full application data cannot be used to perform the evaluation automatically).	6-38	6.1.2			
FN 18	Functional	Dashboard	The Contractor shall build the ability for client to request a replacement Benefits Issuance Card (BIC) and/or EBT Card their Portal account. This request will be routed to appropriate interface system for issuance.	Y	<b>Deloitte Digital's solution meets this requirement</b> by letting users request a replacement Benefits Issuance Card (BIC) and/or EBT card from their account.	6-50, 6-53	6.1.5			
FN 19	Functional	Dashboard	The Contractor shall build the Portal/Mobile to display EBT balance and transition history from the statewide EBT system.	Y	<b>Deloitte Digital's solution meets this requirement</b> by importing and displaying EBT balance and EBT transactions on the client's account dashboard.  <b>Deloitte Digital's solution exceeds this requirement</b> by displaying forecasted deposit amounts and dates (if available to be sent by the EBT vendor). Additionally, our solution can add a budgetary amount helping the user understand their remaining amount with the percentage of days passed/remaining.	6-50, 6-53	6.1.5			
FN 20	Functional	Application Process	The Contractor shall build the ability for Portal users to select an alternative office for an application submission if desired, listed in order of distance from their address within that county. The office list must support the program(s) being requested by the Portal user and any offices that do not support the program(s) applied for should not be displayed in the alternative office list.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing users to select an alternative office for application submission as described in the requirement.  <b>Deloitte Digital's solution exceeds this requirement</b> by storing the programs supported by each office in a configurable reference table, which is used by the selection criteria to determine the available alternative offices.  <b>Additional potential services that could be requested:</b> Deloitte can bring specialist staff who can look through the transactional data to help the State provide user suggestions on the office to help better load balance and process the application in a more timely fashion.	6-39	6.1.2			
FN 21	Functional	Application Process	The Contractor shall build the ability for Portal users to view and print a PDF version of their application summary.	Y	<b>Deloitte Digital's solution meets this requirement</b> by generating a PDF Summary of the user's application that can be viewed and printed.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing the customer to view the PDF Summary before and after submission. By allowing the customer to view the PDF summary prior to submission, the customer can check that all information is accurately captured. Additionally, the PDF summary will be generated in English, as well as the language of their selection (if not English). Additionally, we generate the PDF in a non-editable format to prevent unauthorized editing of the summary.	6-38	6.1.2			
FN 22	Functional	Application Process	The Contractor shall build the ability for Portal users to view and print their application summary and assign a unique application number, as well as the ability to view previous application summaries submitted for one year.	Y	<b>Deloitte Digital's solution meets this requirement</b> by assigning a unique application number to all initiated and submitted applications, and including the unique number within the printable PDF application summary, which is available for up to 1 year for submitted applications.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing the portal user with the generated PDF in the language that they selected at time of submission, as well as a copy in English. This PDF can be saved to their local system, if needed for their personal records.	6-38	6.1.2			
FN 23	Functional	Application Process	The Contractor shall build the logic to convert the Portal users answers to application questions into a PDF version of a state form (example: SAWS 2 Plus) and a copy of the PDF version shall be stored in the image repository in the CalSAWS Software in real time upon submission of the application. The Contractor shall add the ability to interface with CalSAWS to provide the Portal users with the client data in real-time. The Contractor shall add the ability to link an application/form data to a case in CalSAWS for processing.	Y	<b>Deloitte Digital's solution meets this requirement</b> by generating additional worker-facing PDF summaries in the format corresponding to the form that the submission is for (e.g., SAWS 2 Plus). Like the customer-facing PDFs, these summaries will be stored in real time in the image repository upon submission. Using a CalSAWS interface, these summaries will be linked to the application/form data of the corresponding case. Our solution also interfaces with CalSAWS to retrieve real-time data about the client, specifically when up-to-date client data needs to be displayed in the portal (i.e., during Change Reporting, Renewals, and Semi-annual Reviews).	6-38, 6-40	6.1.2			

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FN 1	Functional	Home Page	The Contractor shall create two types of announcements to be displayed for Portal users once they are logged in on the home page: - Allow the 58 Counties to enter county specific announcements via security controlled by the county. - Allow the project to enter statewide announcements via security controlled by the Consortium.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability for homepage announcements to be created per user roles and county designations. Counties will have security-controlled access to post their own announcements, which will be displayed to logged in users located within that County as well as any unauthenticated user that is determined to be located in the county via a zipcode lookup (if entered by the user). State users with security-controlled access will also have the ability to send out statewide announcements that can be shown to all users regardless of County association and regardless of logged in status.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing both County and statewide announcements to be tailored and configured to display for certain groups of users. Announcements can be displayed to groups of users based on user type (client vs. CBO).	6-50, 6-51	6.1.5			
FN 24	Functional	Account Mgmt.	The Contractor shall build the ability for Portal users, including CBOs/FBOs, to: create an account or log in with a pre-existing customer ID & PIN. This includes county authorized Community Based Organizations (CBO/FBO). The Contractor shall build the ability for Portal users to: a) Create an account b) Use existing customer ID & PIN c) Anonymous - must complete/submit app in one sitting d) Request Temporary Access Code	Y	<b>Deloitte Digital's solution meets this requirement</b> by including intuitive login (with username and password or pre-existing customer ID and PIN), password reset, and account creation features that provide users, including CBOs/FBOs, the ability to complete bullets A thru D in the requirement.	6-31	6.1.1			
FN 25	Functional	CBO Access	The Contractor shall build the ability for Portal users to create an account or log in with a pre-existing customer ID & PIN. Users (other than CBO/FBO or County Staff) who forget their customer ID/PIN to log in will be prompted with a minimum of 3 other credentials such as EBT/BIC card number, last 4 of SSN, DOB, zip code, CIN, EBT#, or last 4 of phone number, etc., to complete log in.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing CBO/FBO users to create accounts or login with existing credentials. CBO/FBO users will be provided account retrieval methods using text, email, or security questions including combination specified in the requirement.	6-31 6-46	6.1.1 6.1.4			
FN 26	Functional	Application Process	The Contractor shall build the ability for Portal users to edit, per program policy, update, save and submit reports, including, but not limited to, CalFresh Recertification, Medi-Cal Renewal, CalWORKs Renewal, and/or mid-period changes along with the supporting images/documentation.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing users to initiate, update, save, and submit renewals and mid-period changes for CalFresh, Medi-Cal, and CalWORKs programs. Additionally, our base solution includes the capability to support the upload and submission of supporting documentation/images.  <b>Deloitte Digital's solution exceeds this requirement</b> by automatically examining the submitted renewal information and making recommendations to the end user about what documentation may be helpful to submit, prior to a worker processing the renewal. Additionally, our base solution provides a "change selection" menu that is dynamic, responding to the programs on the existing case and the household characteristics. For example, if the household includes a female of a certain age on a Medi-Cal case, the change selection screen will permit the household to report a pregnancy.	6-40	6.1.2			
FN 27	Functional	Application Process	The Contractor shall include the ability to view periodic reports in an "Incomplete" report status and the ability to re-submit a report along with additional supporting documentation. Any periodic report that is re-submitted shall create a task for the worker to process the re-submitted report.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing "incomplete" periodic reports to be re-submitted along with supporting documentation/images. Upon receipt, CalSAWS will generate a task for the worker to process the re-submitted report.	6-41	6.1.2			
FN 28	Functional	Application Process	The Contractor shall add the ability to generate and print a PDF confirmation receipt with, at a minimum, date/time information for all submitted reports (SAR 7, CF Recertification, Medi-Cal Renewal, CalWORKs Renewal). An optional email or text of receipt will be provided to those with email addresses on file.	Y	<b>Deloitte Digital's solution meets this requirement</b> by generating a PDF confirmation receipt that includes date/time information for any of the submitted report types. An email or text will be also generated and sent in real time upon submission if the customer has an email address or cell phone number on file (and depending upon their notification preferences).  <b>Deloitte Digital's solution exceeds this requirement</b> by also including other information besides date/time, such as the programs requested, the policy-determined filing date of each program, the name of the primary applicant, and the unique submission number. We realize that email and text should not contain sensitive information, thus we provide a quick link for the user to view the PDF within an authenticated session, allowing the portal to continue to apply security and access control to the information.	6-40	6.1.2			
FN 29	Functional	Notifications	The Contractor shall build the ability for Portal users to opt-in or opt-out of eNotifications, text message alerts and email alerts from within the Portal. Outbound text and emails will not be sent on cases that have been designated as a Confidential Case or flagged for Domestic Violence. These options must be configurable and updateable as separate items.	Y	<b>Deloitte Digital's solution meets this requirement</b> by enabling clients to opt-in or opt-out of notifications (texts and email alerts) from within the Portal/Mobile App dashboard Message Center functionality. Furthermore, our solution allows for the configuration of case-level security settings to flag Confidential or Domestic Violence cases so that outbound messages are not sent.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing clients the option to add multiple phone numbers and mailing addresses. The client will also have an option to designate the primary mailing address.	6-71	6.1.11			

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FN 30	Functional	Notifications	The Contractor shall add the ability for the Portal to record when a client views the eNOAs and transmit that information including the date and time to CalSAWS to be saved to the client's case as a journal entry.	Y	<b>Deloitte Digital's solution meets this requirement</b> by configuring the Portal to track when eNOAs are viewed and capturing the view status on the backend CalSAWS system so that it is included as part of the client's journal entry.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing clients to view clearly categorize eNOAs as read and unread notifications in the Message Center UI.	6-71	6.1.11			
FN 31	Functional	Rules	The Contractor shall build the ability to allow for a condensed version of the application questions when the Portal user is redirected from <a href="http://www.benefitscal.com/ch">www.benefitscal.com/ch</a> when the Portal user enters CalHEERS Case Number (CalHEERS/Covered CA).	Y	<b>Deloitte Digital's solution meets this requirement</b> by supporting the ability to auto-populate parts of the application based on information obtained from CalHEERS, thereby reducing the number of application questions that must be answered by the user. This process will be triggered when a user enters the CalHEERS Case Number during the beginning of the application process and/or is redirected from <a href="http://www.benefitscal.com/ch">www.benefitscal.com/ch</a> .  <b>Deloitte Digital's solution exceeds this requirement</b> as we have the ability to create a seamless experience for the user as he/she seeks to apply for other programs that are not offered through CalHEERS (e.g., CalFresh, CalWORKs). As the new CalHEERS M&O provider, we have insights into the process that will make the experience easier for a user. Individuals that are potentially eligible for non-MAGI programs may also look to apply for health coverage through the portal while their application has already been sent from CalHEERS to CalSAWS. To reduce the incidence of duplicate applications the portal will also confirm with CalHEERS if the application has been submitted to CalSAWS for non-MAGI processing.	6-43	6.1.2			
FN 32	Functional	Home Page	The Contractor shall build the ability to inform clients regarding voter registration by providing the link <a href="https://www.sos.ca.gov/elections/voter-registration">https://www.sos.ca.gov/elections/voter-registration</a> within the appropriate page in the app.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a link to voter registration information in a place within the app as agreed upon with the Consortium.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing the State to look at the data over time in Google Analytics to see when users are most likely to view the voter registration link, allowing for better placement and design.	6-50, 6-51	6.1.5			
FN 33	Functional	Application Process	The Contractor shall build a real time address validation for Portal users to confirm their address after the Portal user enters their address. The Portal user then will have the option to choose the system validated address or the user entered address.	Y	<b>Deloitte Digital's solution meets this requirement</b> by integrating with the existing third-party data source from CalSAWS to validate the address in real time and provide suggested corrections to display to the end user. The end user can select the suggested address or keep their address as originally entered.  <b>Deloitte Digital's solution exceeds this requirement</b> by validating against trusted data sources that consider the mail-deliverability of the address, reducing returned mail for the Counties. Additionally, our solution captures and stores the geo-coded representation of the address to enable distance calculations between County/offices and the applicant. We have noticed that displaying the map of the user address helps to nudge the user to confirm and accurately enter their address. And with USPS as a client, we are able to be aware of new features & services being introduced, such as new services that allow users to enter a code rather than their physical address.	6-37	6.1.2			
FN 34	Functional	Application Process	The Contractor shall build the ability to support multiple electronic signatures or initials where applicable (such as CalWORKs two parent households, Authorized Representatives, etc.) for all documents requiring a Portal signature. Copies of electronically signed documents will be stored real time in the CalSAWS imaging repository.	Y	<b>Deloitte Digital's solution meets this requirement</b> by supporting multiple electronic signature fields during the submission process, depending upon the content of the application. For example, if an authorized rep is designated on the application, NextGen360 supports displaying two electronic signature fields. After submission, the electronic signatures are displayed in the PDF summary and stored in the CalSAWS imaging repository.  <b>Deloitte Digital's solution exceeds this requirement</b> by comparing the electronic signature against the names entered on the application. If there is a mismatch, the portal sends an indicator to CalSAWS that the signature does not match the applicant name (or auth rep name) exactly as entered.	6-38	6.1.2			
FN 35	Functional	Application Process	The Contractor shall build functionality to determine the best county/office for application submission based on Portal user address location using GIS software and office boundaries and programs supported within the office location. This must be configurable by county.	Y	<b>Deloitte Digital's solution meets this requirement</b> by determining the best County/office to route the application submission to based on the applicant's proximity to the County/offices that support the programs requested in the application. Additionally, the solution will capture all County/office boundaries and locations in configurable reference tables.	6-39	6.1.2			
FN 36	Functional	Application Process	The Contractor shall build the ability and configurability by county, to define alternative routing of Portal applications/Portal appointments, to a specific county office/unit/user profile, for centralized processing, if desired.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing configurable reference tables that define alternative routing of application submissions (and appointments) to specific County office/unit/user profiles.  <b>Deloitte Digital's solution exceeds this requirement</b> by enabling or disabling, through configuration by County, the ability for customers to override the alternative routing prior to submission in the portal.	6-39	6.1.2			

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FN	1	Functional	Home Page	The Contractor shall create two types of announcements to be displayed for Portal users once they are logged in on the home page: - Allow the 58 Counties to enter county specific announcements via security controlled by the county. - Allow the project to enter statewide announcements via security controlled by the Consortium.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability for homepage announcements to be created per user roles and county designations. Counties will have security-controlled access to post their own announcements, which will be displayed to logged in users located within that County as well as any unauthenticated user that is determined to be located in the county via a zipcode lookup (if entered by the user). State users with security-controlled access will also have the ability to send out statewide announcements that can be shown to all users regardless of County association and regardless of logged in status.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing both County and statewide announcements to be tailored and configured to display for certain groups of users. Announcements can be displayed to groups of users based on user type (client vs. CBO).	6-50, 6-51	6.1.5		
FN	37	Functional	Notifications	The Contractor shall build functionality to display a worker initiated message/actions list to Portal users from CalSAWS. Staff should be able to send actions including, but not limited to, the following: 1) Information only 2) Signature needed 3) Request for verifications 4) Alerts a) Read b) Unread 5) Actions (information only, signature needed, request for verification) a) Opened actions b) Actions submitted c) History 10) ENotices a) View notices b) Date range (for up to 6 months) c) Sort by (date, alphabet, etc.) 11) The Portal user shall receive an email notification to inform them that a message has been posted to their Portal account and the Portal user can respond or take appropriate action instantly. The exchanges are to be automatically documented in the case notes/journal without worker interaction.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a Message Center capability that enables two-way messaging allowing clients to view and respond to CalSAWS worker-initiated messages. This includes alerts, actions, and eNotices. Additionally, our solution allows clients to receive an email notification when a message is posted to their account. All communication is automatically documented.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing clients to receive push notifications alerting them about messages posted to their account. Our solution can allow for different status levels of the message/actions, along with due dates that can be used to better display and nudge the users into completing the actions.	6-68	6.1.11		
FN	38	Functional	Notifications	The Contractor shall build functionality to display Portal user initiated messages/actions from the Portal to CalSAWS with a subsequent task to the worker with the message that was initiated by the Portal user and include the ability for the Portal user to save and print messages/actions.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a Message Center capability that enables two-way messaging allowing clients to initiate, view, and respond to messages. Additionally, our solution will allow clients to save and print messages/actions within the Portal/Mobile App.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing clients to receive push notifications alerting them about messages posted to their account. Our solution can allow for different status levels of the message/actions, along with due dates that can be used to better display and nudge the users into completing the actions.	6-70	6.1.11		
FN	39	Functional	Application Process	The Contractor shall build the capability for Portal users to download and print standard forms including, but not limited to, client correspondence available in Portal. <b>PDF versions of standard forms should be fillable offline where available and appropriate.</b>	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing portal users with the ability to download and print standard forms, including the any client correspondence that has been generated for the client.  <b>Deloitte Digital's solution exceeds this requirement.</b> For standard forms available for download, our solution provides a basic search utility to search by form name or identifier. Forms will be available in all languages as provided by the Consortium. For client correspondence, we exceed the requirement by tracking which correspondences have been read and by whom. This tracking enables the user to see which correspondences are new and which have been previously viewed.	6-41	6.1.2		
FN	40	Functional	Reporting	The Contractor shall create and automatically generate reports on an agreed upon frequency related to Portal usage by county and Consortium wide including but not limited to: a) Logins per month: unique users per month; method of access (mobile devices vs. PCs); b) Applications submitted per month broken down by program and final disposition c) Number of documents uploaded per month d) eNOAs viewed per month e) Number of messages to/from clients/workers f) Reports (SAR7) submitted per month g) Number of renewals submitted per month The reports shall be made available to the counties via the Consortium web Portal or via another avenue as agreed upon by the Contractor and Consortium.	Y	<b>Deloitte Digital's solution meets this requirement</b> by generating portal usage reports as described in sub requirements a through g. Deloitte will provide counties access to the reports via the Portal or through another channel as agreed upon with the Consortium.  <b>Deloitte Digital's solution exceeds this requirement</b> because we leverage a comprehensive analytics and reporting tool called SEMOSS that provides robust visualization capabilities and export capabilities.	6-58	6.1.7		

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FN 41	Functional	Account Mgmt.	The Contractor shall build the ability for Portal users to link multiple cases to their Portal account, if desired, utilizing same security credentials to authorize case access. Do not allow for duplicate Portal accounts. However, multiple cases can be linked to a single Portal account where the Portal user is the primary applicant on the case. An email address can only be associated to a single Portal account.	Y	<b>Deloitte Digital's solution meets this requirement</b> by designing a self-service portal that supports linking multiple cases to a single account based on the primary user. Additionally, we prevent duplicate portal accounts having the same username or email.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing support for authorized representatives and CBO assisters to link to cases in order to help clients manage their benefits. These users will be able to manage multiple clients in the system within one account by creating their own user accounts and receiving proper approval from the primary client on the case.	6-31	6.1.1			
FN 42	Functional	Account Mgmt.	The Contractor shall provide the following to Portal users who are attempting to create account with existing email: a) Options to reset password/username to access account b) Instructions to create new account with a different email.	Y	<b>Deloitte Digital's solution meets these requirements</b> by providing clear options for users to retrieve their username or reset their password via text, email, or security questions if they are attempting to create a new account with an email address that already exists in the system. If users no longer have access to the email address they previously used to create their account, clear instructions are provided for them to create a new account with an email address not present in the system records.	6-31	6.1.1			
FN 43	Functional	Reporting	The Contractor shall build the ability to monitor network traffic, Portal usage, data and error logs (reports) from the Portal to perform needed troubleshooting, analysis, statistics, and reporting (Google Analytics or similar product).	Y	<b>Deloitte Digital's solution meets this requirement</b> by integrating Google Analytics into the Portal/Mobile App solution. We will use standard Google Analytics reports to monitor network traffic, portal usage, data and error logs to support troubleshooting, analysis, statistics and reporting.  <b>Deloitte Digital's solution exceeds this requirement</b> because we supplement Google Analytics with OpInsights as described in Section 6.2.6 to provide additional infrastructure and application monitoring capabilities.	6-57	6.1.7			
FN 44	Functional	Account Mgmt.	The Contractor shall include terms and conditions of the site including consent to have access monitored for all Portal users who agree prior to setting up their account, except for authorized law enforcement investigations. The terms and conditions are to include the following information: a) No attempts are to be made to identify individual users or their usage habits b) Ability to take appropriate security measures to protect against unauthorized access, alterations or destruction of data, including personal and private information.	Y	<b>Deloitte Digital's solution meets these requirements</b> by clearly stating the terms and condition of the site and requiring each user's consent upon account creation. Additionally, our solution will comply with the terms and conditions and not make attempts to identify individual users or their usage habits, and will protect against unauthorized access, alteration, or destruction of personal/private data.	6-31	6.1.1			
FN 45	Functional	Document Upload	The Contractor shall provide a dynamic Verification Check List to Portal users, as appropriate to support the programs for which they are applying.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing residents to upload requested verifications for pending applications and/or existing cases. Requested verifications will be displayed on the solution dashboard for residents to easily identify verifications for which they need to upload documents.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing this to be configurable, which means the business can change the verification list with policy changes.	6-55	6.1.6			
FN 46	Functional	Dashboard	The Contractor shall provide the Portal user with a printable verification of benefits (past and present) including household members and program information for current county associated with (PA1913/Passport to Services).	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing users to easily print any of their correspondence, including their approval letter, which provides verification of benefits for all household members.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing the choice for users to print records from previous time periods.  <b>In future phases</b> , our solution could provide a QR code on the printed version for the receiver of the information to confirm that the information on the paper is valid, for the time period.	6-50, 6-52	6.1.5			

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FN 47	Functional	Reporting	The Contractor shall build the technical functionality to queue up applications, report submissions, and all other Portal user updates during CalSAWS downtime. Once CalSAWS is back online, the Portal should automatically submit the queued up data with the original submit date and time stamp utilized by CalSAWS as appropriate. In addition, case/person level data retrieval during CalSAWS downtime is to be managed whenever possible by pointing/redirecting to alternative production copy databases to minimize Portal user impact/interruptions during any maintenance.	Y	<b>Deloitte Digital's solution meets this requirement</b> by queueing all submissions (e.g., applications, change reports, renewals, documents). If CalSAWS is up, then submissions are processed in real time. If CalSAWS is down, then submissions wait in the queue until CalSAWS is online and a process resubmits them (using the original submission date and time stamp). This integration is explained in further detail in our narrative response. Additionally, when CalSAWS is down, the portal will retrieve data (e.g., case/person level data) from the same CalSAWS REST API endpoints. It is the responsibility of the CalSAWS vendor to temporarily service their API endpoints by a back-up service and/or production copy database.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing a daily reconciliation report of the integration of the portal to CalSAWS.	6-44	6.1.2			
FN 48	Functional	Account Mgmt.	The Contractor shall build the ability for Portal users to reset passwords with multiple customer options, such as: a) Security Questions b) Email c) Text	Y	<b>Deloitte's base solution meets these requirements</b> by allowing users to retrieve account information or set new passwords through email, text message, or through security questions.  <b>Deloitte's base solution exceeds this requirement</b> by making the UI of password reset very easy to access and process, as we know this is a high percentage of the call center calls.	6-31	6.1.1			
FN 49	Functional	Reporting	The Contractor shall build an automatic journal for every action taken such as action created, action rejected, action opened/viewed by client, closed, or returned to client.	Y	<b>Deloitte Digital's solution meets this requirement</b> by maintaining a journal (i.e., audit trail) that includes updates/modifications made to any client records using system access.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing record navigation to display the current and historical records to clearly denote what client data and information was updated in the form of a report.	6-59	6.1.7			
FN 50	Functional	Application Process	The Contractor shall store and record all submitted applications for Portal users to view in their account. Applications that have not been submitted will be stored for one year before purging. Clients will be alerted to expiring unsubmitted apps.	Y	<b>Deloitte Digital's solution meets this requirement</b> by storing and recording all submitted applications for authorized portal users to view in their account. Unsubmitted apps will be available to view for up to 1 year (configurable) before purging, and will be notified before expiration.  <b>Deloitte Digital's solution exceeds this requirement</b> by applying a multi-layer security model upon in-progress and submitted applications. Subject to policy, our base solution can control which household members can view applications (typically only the primary applicant and their spouse). Similar to emails from retailers that notify you that you have left something in the shopping cart, our solution can send notifications to users saying they have uncompleted applications in the portal.	6-41	6.1.2			
FN 51	Functional	Application Process	The Contractor shall design, build, deploy and maintain the technical functionality to store submitted applications, forms and verification documents uploaded in the event of an error and to allow the applications, forms and verification documents to be automatically resubmitted following resolution of the error.	Y	<b>Deloitte Digital's solution meets this requirement</b> by securely storing submitted apps, forms, and documents in the event of an error and re-submitting them automatically following resolution of the error.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an automated process that retries the submission within a configurable amount of time. If the submission fails after automatic retry, an automated email notification is sent to support staff for troubleshooting and resolution. Upon resolving the technical issue, the exception app, form, or document can be re-triggered for submission through the interface. Our solution will allow the applicant to continue navigating through the portal, even during the automatic retry. The user will not be stopped due to a backend technical error that prevents submission.	6-37	6.1.2			
FN 52	Functional	Home Page	The Contractor shall build "Am I Eligible" functionality which allows Portal users to see if they are potentially eligible for cash aid, medical services or CalFresh and other county assistance programs by answering a few questions without creating an account or completing an application.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a "pre-screening" feature that uses customizable forms to gather limited data from a user and estimate eligibility results for multiple programs based on the business rules defined by the Consortium's program policies. This feature is easily accessible from the Home Page and is available to not-logged-in users.  <b>Deloitte's base solution exceeds this requirement</b> by providing a link to other County assistance programs if the user is deemed eligible. If the user decides to continue with the application, our solution can ask the user if he/she would like to prepopulate the actual application with any previously entered information that conforms to the application fields. Additionally, our "Am I Eligible" module uses configurable business rules to determine potential eligibility.	6-50, 6-51	6.1.5			

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FN 53	Functional	Dashboard	The Contractor shall ensure the client benefits section provides case related information for each applicable program. The information provided shall include but not be limited to Case number, County, Program Status, number of members in the Household, Sanction Status, Benefit amount, Share of Cost, Redetermination Due Month, Reporting Type, Report Due, Report Status, Worker Name, Worker Number, Worker Phone.	Y	<b>Deloitte Digital's solution meets this requirement</b> by displaying all case-related information listed in FN53 on the user dashboard after a user has successfully linked their case to their account. The dashboard will display all approved, denied, and closed cases. Upon selecting an individual case, additional information will be displayed regarding the case, and the user will have the option to report changes or renew their benefits.  <b>Deloitte Digital's solution exceeds this requirement</b> by showing the plain text information and displaying it in a more visual and consumable fashion (for example, report due date can be show in remaining days or a calendar view).	6-50, 6-52	6.1.5			
FN 54	Functional	Help	The Contractor shall include a Help Section including but not limited to: a) FAQs b) Glossary c) Terms and Conditions d) Application Instructions e) Contact Us information f) Link to EBT g) Privacy notices h) Information on eNotification and Text messaging i) Office Locations and Surcharge Free ATMs	Y	<b>Deloitte Digital's solution meets this requirement</b> by working with the State to develop friendly, easy-to-understand help content based on the needs. FAQs are also available for clients throughout the application, which has search capabilities by using keywords.  <b>Deloitte Digital's solution exceeds this requirement</b> by have a "nudge engine" that can help prevent common misses and oversights or encourage the users to insert non-mandatory information that will help the processing time and avoid extra case worker follow-ups.	6-60	6.1.8			
FN 55	Functional	Help	The Contractor shall include the ability to link instructional videos for Portal users. The instructional videos shall be uploaded only by the Consortium or Counties via security.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing the State to easily select videos links to display on the portal.	6-60	6.1.8			
FN 56	Functional	Help	The Contractor shall include an Affordable Health Insurance information link that will redirect the client to the Covered California Website.	Y	<b>Deloitte Digital's solution meets this requirement</b> by creating a link to the Covered California website in a place appropriate to the need.  <b>Deloitte Digital's solution exceeds this requirement</b> by being the M&O vendor for the system of Covered California: thus, we can coordinate in context or deep linking to the appropriate sections.	6-60	6.1.8			
FN 57	Functional	Home Page	The Contractor shall provide informational and educational links, including but not limited to: • Cash Aid Options • Food Assistance • Medical Services • Required Reporting • Cooking and Nutrition • Job Skills • eatfresh.org • Disaster CalFresh Links should be provided with information on what can be found on the site.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the configurable ability to add links to other webpages from the Home Page. Each link will be maintained in a reference table along with informational description.  <b>Deloitte Digital's solution exceeds this requirement</b> by informing end users if they are navigating to a site that isn't on the ca.gov domain.	6-50, 6-51	6.1.5			
FN 58	Functional	Notifications	The Contractor shall build a messages/notification section to display client correspondence such as, eNotifications, NOAs, alerts, confirmations, appointment letters.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a Message Center section that displays client correspondence such as eNotifications, NOAs, alerts, confirmations, and appointment letters.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing clients the number of unread messages on the dashboard that they can access without entering the message center section. A number badge will be displayed.	6-68	6.1.11			
FN 59	Functional	Dashboard	The Contractor shall build user notification alerts for all renewals/reports not received or which are incomplete to remind users of needed actions. Notification will include by text, email, phone call with due dates.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing alerts on the client's Dashboard, as well as notifications sent by text, email, or phone call (according to the user's notification preferences) to notify the primary contact of missing information or information not received.  <b>Deloitte's Digital's solution exceeds this requirement</b> by alerting users with the appropriate browsers with push notifications.	6-50, 6-52	6.1.5			
FN 60	Functional	Notifications	The Contractor shall automatically generate appointment reminders in the Portal user's account for all upcoming appointments.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing the user to view upcoming appointment reminders as part of our Message Center capability.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing clients the ability to add appointments to their local device calendars. Our solution allows reminders to be pushed to users at configurable times.	6-70	6.1.11			



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FN 61	Functional	Application Process	The Contractor shall identify at the beginning of an application the approximate amount of time to complete the application and build a percentage complete tool bar which allow users to gauge how much of the application has been completed.	Y	<b>Deloitte Digital's solution meets this requirement</b> by informing the applicant of the approximate amount of time to complete the application, prior to starting the application process. Additionally, our base solution includes a progress bar that shows the percentage completed as the user progresses through the application.  <b>Deloitte Digital's solution exceeds this requirement</b> by dynamically updating the progress bar based on the dynamic nature of the question flow. For example, if the household applies for multiple programs and reports multiple sources of income, the progress bar correspondingly adjusts to reflect the added complexity and time of the application process.  <b>Additional potential services that could be requested:</b> Deloitte could look at historical data with time stamps to provide an average and estimated time of completion, which could allow the user to plan their time in front of the computer.	6-35	6.1.2			
FN 62	Functional	Application Process	The Contractor shall ensure the Portal contains and uses the following forms, when appropriate SAR 7, SAWS 2 Plus, DFA 385, CF 285 and CF37, or other state forms as needed to support Portal functionality.	Y	<b>Deloitte Digital's solution meets this requirement</b> by basing interactive question flows on the corresponding printed forms, and offering the printed forms for download and print as well.  <b>Deloitte Digital's solution exceeds this requirement</b> by converting two of the existing printed forms into highly-dynamic, user-centered question flows based on our experience building similar portals for 25 other states.	6-41	6.1.2			
FN 63	Functional	Account Mgmt.	The Contractor shall map all the Portal drop down reference table fields to the CalSAWS.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing in portal reference tables that can be mapped to CalSAWS drop-down values. Deloitte will work with the Consortium to confirm that this mapping occurs during the design phase so that applications can transfer clearly from the portal to CalSAWS without loss of data.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an access controlled administration screen to allow appropriate users to adjust drop-down values without a full code deployment.	6-44	6.1.2			
FN 64	Functional	Application Process	The Contractor shall ensure Portal pages are dynamic, that users will only be required to answer questions based on the program (s) they are applying for, or in response to previous questions.	Y	<b>Deloitte Digital's solution meets this requirement</b> by enabling highly dynamic question flows that are driven based on the programs the applicant is requesting. Our solution displays only the questions permitted to be displayed for the requested programs. Furthermore, responses to prior questions inform whether subsequent questions are displayed, as described in detail in Section 6.11.6.  <b>Deloitte Digital's solution exceeds this requirement</b> by leveraging our built-in configurable framework capabilities: program-based display rules and question flows, described in Section 6.11.6.  And as we know, it's not as simple as mandatory versus non-mandatory. There will be conditional mandatory fields, and there will be situations in which if the user enters certain non-mandatory fields, it will help their application be processed faster and prevent additional work by the case worker. Our solution can help provide "nudges" to encourage such good behavior.	6-34	6.1.2			
FN 65	Functional	Home Page	The Contractor shall build optional email and text Portal confirmation receipts for users upon successful submission of application.	Y	<b>Deloitte Digital's solution meets this requirement</b> through the notification functionality that has the ability to send both emails and texts based on set rules like a submission. Users can opt out of text and email by managing their communication preferences in the Portal/Mobile App solution.  The key is to avoid the user doubting whether their application was submitted or not, so providing clear feedback is critical. Even if there are back-end technical issues, the users should know that their submission was submitted on a certain date and time. And even if the worker portal doesn't get it until later, the date and time will be accurately captured.	6-39	6.1.2			



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FN	66	Functional	Dashboard	The Contractor shall ensure the Portal website is secure (https:) and up to date with security measures and precautions.	Y	<b>Deloitte Digital's solution meets this requirement</b> by using HTTPS communication for all web traffic. Additionally, to keep up to date with security measures and precautions for our Portal/Mobile App solution and deliver a secure end-to-end solution, we will implement and maintain security controls to appropriately secure the integrity and confidentiality of data that have been entrusted to Consortium by the Californians. Deloitte will work closely with Consortium to integrate security activities throughout the system lifecycle enabling timely, risk-based identification and remediation of security vulnerabilities. Our proposed secure SDLC approach includes periodic review of security requirements, security design principles, coding guidelines and execution of code reviews, and vulnerability testing activities aligned to industry standards such as OWASP and NIST. We also periodically review release notes of product dependencies, apply adjustments to our procedures and documented processes and incorporate product updates into our release schedule in consultation with the product vendors and Consortium.	6-53	6.1.5		
FN	67	Functional	Account Mgmt.	The Contractor shall build a user account management section for Portal users to update account details such as email address, phone numbers, password and other information.	Y	<b>Deloitte Digital's solution meets these requirements</b> regarding supporting account management capabilities by allowing users to create and manage their accounts, including updating email addresses and phone numbers as well as resetting passwords.  <b>Deloitte Digital's solution exceeds this requirement</b> by provide a Responsive Web Design application, which allows the account detail updates to be easily completed in many device formats, including tablets by CBOs or smartphones by the users. Periodically, the user could be prompted with a confirmation to keep their information up to date.	6-31	6.1.1		
FN	68	Functional	Application Process	The Contractor shall ensure PII data elements such as SSN and DOB are masked after user enters the information on the screen.	Y	<b>Deloitte Digital's solution meets this requirement</b> by masking sensitive PII data elements such as SSN and DOB while they are entered by the user.  <b>Deloitte Digital's solution exceeds this requirement</b> by requiring the user to re-enter the entire PII data element value, upon trying to edit or change the value. Additionally, this sensitive PII is also masked in customer-facing PDF application summaries. This approach further secures sensitive PII data elements from unauthorized actors.	6-42	6.1.2		
FN	69	Functional	Account Mgmt.	The Contractor shall create one home page in the new Portal to reflect all 58 Counties.	Y	<b>Deloitte Digital's solution meets these requirements</b> by providing one portal Home Page for all 58 Counties that will allow variations by County. Configurable sections of the Home Page for announcements and other content can be controlled by Counties to display their information.	6-50, 6-51	6.1.5		
FN	70	Functional	Application Process	The Contractor shall build the new Portal to include all SAWS 2 Plus questions.	Y	<b>Deloitte Digital's solution meets this requirement</b> by including all SAWS 2 Plus questions in the application process.  <b>Deloitte Digital's solution exceeds this requirement</b> by using a framework and flexible data model that supports adding additional questions without requiring major refactoring. Furthermore, our framework can dynamically display only the relevant questions. To the extent possible, answers to questions that may be derived will take the place of specific questions that are called out separately on the SAWS 2 (e.g., household relationships can be derived to complete the household composition for inverse relationships). This saves a lot of time for both the Portal/Mobile App user as well as the county workers that will process the application.	6-34	6.1.2		

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Phase 1 - DD&I Functional				Contractor Response				For Consortium Use Only		
	REQ#	Category	Sub-category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment
FN	1	Functional	Home Page	The Contractor shall create two types of announcements to be displayed for Portal users once they are logged in on the home page: - Allow the 58 Counties to enter county specific announcements via security controlled by the county. - Allow the project to enter statewide announcements via security controlled by the Consortium.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability for homepage announcements to be created per user roles and county designations. Counties will have security-controlled access to post their own announcements, which will be displayed to logged in users located within that County as well as any unauthenticated user that is determined to be located in the county via a zipcode lookup (if entered by the user). State users with security-controlled access will also have the ability to send out statewide announcements that can be shown to all users regardless of County association and regardless of logged in status.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing both County and statewide announcements to be tailored and configured to display for certain groups of users. Announcements can be displayed to groups of users based on user type (client vs. CBO).	6-50, 6-51	6.1.5		
FN	71	Functional	Home Page	The Contractor shall build the Portal with the following capabilities: 1) Add the ability to retrieve account via 3 additional questions (simplified authentication): a) Case Number or EBT Number b) DOB c) Phone Number or Zip Code d) Medi-Cal BIC Number e) Client Index Number (CIN) 2) Add a new question for the client to indicate that the account is at risk (compromised). 3) Add a question in CalSAWS for the worker to lock/unlock the client's self-service account. 4) Add the ability for CalSAWS to perform an account lockdown to prevent the client from accessing their account through requirement #NN. 5) Allow access to the account only via PIN. If the PIN is forgotten, add the capability to receive a new PIN via mail, text, or Email. This will be sent to the primary applicant's information stored in CalSAWS. 6) Add the reset PIN functionality and add the ability to receive new PIN via mail, text, or Email. This will be sent to the primary applicant's information stored in CalSAWS. 7) Add the ability to retrieve the user name via "Forgot Username" functionality. 8) Add the ability to retrieve the password via "Forgot Password" functionality.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a robust login and account retrieval workflow for users that complies with requirements 1 through 8. From the client perspective, the solution provides a user-friendly process for retrieving your account information through a set of questions or through a PIN. If the client forgets their login information, they can easily retrieve their username and/or password, or reset their PIN. The solution also lets a user indicate if their account is possibly compromised, and gives workers the ability to unlock/lock the account in case the account is compromised.	6-31 6-50, 6-51	6.1.1 6.1.5		
FN	72	Functional	Help	The Contractor shall build the Portal with the following capabilities: a) Migrate the FAQs that are currently in existing SAWS Portal to the new Portal. b) Update the FAQs so they are accessible if/when the client is logged in or not. c) Add searching and indexing throughout the Portal.	Y	<b>Deloitte Digital's solution meets this requirement</b> by working with the State to curate friendly, easy-to-understand FAQ content. The FAQ section will be indexed and can be searched using keywords.  <b>As a possible enhancement in a future phase</b> , Deloitte Digital can build a chatbot capability that could ingest the FAQs, allowing the user another channel to quickly get their questions answered.	6-60	6.1.8		
FN	73	Functional	General	The Contractor shall build the Portal with the following capabilities: a) Create a modern user friendly home page that will include announcements b) The ability to scroll through the announcements. c) Display the announcements in the selected language if available. d) Default the announcements to display in "English" if no language is selected or if the selected language is not available.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a Home Page designed using our Elevate the Human Experience (#EHX) User-Centered Design (UCD) method. The Home Page will include an area for announcements, which can be customized by County or statewide announcements. The Home Page will allow for multiple announcements to be displayed and navigated using scrolling functionality. Announcements will default to display in English. If the user selects a different language, the announcement text provided for the corresponding language will be displayed.  <b>Deloitte Digital's solution exceeds this requirement</b> by combining our research with real users and CBOs/FBOs, our insights from data patterns, and our commercial design patterns and technology features to balance when and where to display the announcements with the other sections of the homepage.	6-50, 6-51	6.1.5		

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FN 74	Functional	Application Process	The Contractor shall build the Portal with the following capabilities: a) Add the ability to continue unfinished application(s) b) Add the ability to save the progress of an application on the current page when all required fields have been completed via a save button c) Add the ability to save and continue to the next page via a next button d) Add the ability to submit an application to CalSAWS via a send application button e) Add the ability to navigate to the previous page of the application via a back button f) Add a message that prompts the user to save the information when the user attempts to sign out without saving the page g) Enable autosave.	Y	<b>Deloitte Digital's solution meets this requirement</b> by building a portal that complies with requirements a through g. Our solution meets the requirement by allowing users to save their application progress at any point in the flow, to resume unsubmitted applications, to submit the application at any point in the process (after minimum required application registration has occurred), and to navigate backwards as needed to make corrections. Additionally, upon navigating out of an in-progress application, our solution prompts the user to save their changes. Our base solution automatically saves all changes with each page navigation within the flow.  <b>Deloitte Digital's solution exceeds this requirement</b> by differentiating the appearance and placement of navigational and functional buttons to give more weight to the ones users are most likely to need.	6-35	6.1.2			
FN 75	Functional	Application Process	The Contractor shall build the Portal with the following capabilities: a) Add the "E-App Number", "E-App Status", and "E-App Date" b) Add a message/legend that explains the E-App statuses c) Update the statuses to include Submitted, Received, and Processed d) "Processed" status shall indicate that the e-App has been actioned in the CalSAWS Software. This status will only be applicable to the Portal. There will be Impacts to Conversion and Reporting functions with the new "processed" status.	Y	<b>Deloitte Digital's solution meets this requirement</b> by displaying a listing of submitted applications as described in sub-requirements A through D.  <b>Deloitte Digital's solution exceeds this requirement</b> by applying privacy rules to the listed applications so that only the primary applicant and their spouse (or per program policy) can view the application and its corresponding status. Other household members, such as other adult members of the CalFresh application, will not be able to view this information. We heard from existing portal users that understanding where there application is in the process is difficult. Our solution will not just display the terms but visually reflect where the application is in the process to help the client understand what steps are next.	6-41	6.1.2			
FN 76	Functional	Notifications	The Contractor shall build the Portal with the following capabilities: a) Add a Program (CW, CF, MC, WTW, GA/GR, etc.) field for customers submitting a message to indicate the program that they are asking a question about (including "I don't know") b) Provide an opt-in option to the Counties for using two-way messaging c) Establish a timeframe to respond to customer messages within 3 business days and account for the office hours that have been established in the Portal d) Identify required fields to the end user e) Add common pre-defined questions to be selected by the end user (dropdown) which will include an option for "Other" where the end user will be able to type their question in a free form text box f) Add a worker ID or title that displays to the client when a message has been responded to g) Add performance and audit reports for two-way messaging functionality h) Add dashboards for managing messages (color coding, e.g., SAR 7) i) Add spell check functionality for freeform questions asked by the customer j) Establish two-way messaging timeframes for viewing and sending messages k) Add a word limit for messages. The character limit shall be defined during design.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a Message Center capability that supports requirements a to k by:  a) Allowing clients to send messages and requiring them to provide a program name or indicate that they don't know the program name they're asking about. b) Providing an opt-in option to the Counties for using a two-way messaging capability. c) Allowing the Consortium to establish a timeframe to respond to customer messages within 3 business days, accounting for the office hours that have been established in the Portal. The timeframe can be reconfigured. d) Identifying and clearly marking required fields to the end user. e) Adding common pre-defined questions to be selected by the end user (dropdown), including an option for "Other" where the end user will be able to type their question in a free form text box. f) Adding a worker ID or title that displays to the client when a message has been responded to. g) Including backend performance and audit reports for two-way messaging functionality. h) Adding dashboards for managing messages (color coding, e.g., SAR 7). i) Including spell check functionality for free form questions asked by the customer. j) Providing and configuring two-way messaging timeframes for viewing and sending messages. k) Supporting a word limit for messages, to be defined by the consortium during design.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing clients to receive push notifications alerting them about messages posted to their account.  Additional potential services that could be requested: allowing for 2-way messaging may have an unintended impact on the case worker's ability to respond to all inquiries. Deloitte can help analyze the common inquiries, and our solution can be tailored to leverage an AI engine to provide the case workers with recommended responses. Our solution can also be proactive and suggest these recommended responses and resources to help reduce contact center volumes.	6-59	6.1.11			

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FN 77	Functional	Appointments	The Contractor shall interface with the CalSAWS Statewide Core Appointment component ensuring that all available features are enabled in the Portal/Mobile App.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing residents to view, track, and reschedule the date and/or time of appointments by leveraging a CalSAWS interface.  <b>In future phases as additional enhancements</b> , our solution has the capability to be customized to include State policy timeframes for when appointments for the various programs should be held. This will help prompt residents to reschedule appointments within policy timeframes so that negative actions are not taken on their case if appointments are rescheduled outside policy timeframes for eligibility decisions.	6-45	6.1.3			
FN 78	Functional	Application Process	The Contractor shall build the Portal with the following capabilities: a) Add the ability for customers to report information when completing the RE process b) Create a task for the worker when the RE has been received through the Portal c) Update the RE to received status on the customer reporting page in the case management system when the RE is submitted through the Portal d) Add the "Recertification" section e) Create RE Form(s) for CW/CF/MC that will pre-populate case identifying information via the Portal and generate and post to the customer's account. Once the form is completed, it would be e-signed and sent to the imaging system. f) Create a PDF of the RE submitted on the Portal for the customer g) Add the ability for RE's to be available on the Portal; MC - 2 Months prior and CW/CF - 1 Month prior.	Y	<b>Deloitte Digital's solution meets this requirement</b> by supporting online renewals for CalWORKs, CalFresh, and Medi-Cal, as described in sub-requirements A through G. Requirements B and C are dependent upon CalSAWS functionality.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing a user experience that simplifies the process of completing renewals through personalized question flows based on the programs relevant to their case and their existing household information. For example, if a customer's renewals for both CalFresh and Medi-Cal are in the same month, the user can complete and submit a combined renewal, answering only the questions relevant to these programs. Furthermore, information already on file will be displayed, and the customer needs to provide only new or changed information.	6-40	6.1.2			
FN 79	Functional	Application Process	The Contractor shall build the Portal with the following capabilities: 1) Add the ability for the customer to submit their semi-annual documents 2) Display a validation message when saving an incomplete SAR 7 3) Dynamically display SAR 7 questions based on the programs approved for the case and how the customer answered the questions 4) Add a Due Date when the SAR 7 is due 5) Add various document upload options of QR code (Mobile), PC, and Mail for uploading verification documentation that are required when a customer has completed a SAR 7.	Y	<b>Deloitte Digital's solution meets this requirement</b> by supporting online SAR 7 submissions and associated documentation as described in sub-requirements 1 through 5. As described in detail within our narrative, our solution provides a dynamic SAR 7 question flow that is based on the programs approved for the case and based on their information on file in CalSAWS. As part of the SAR 7, the user will be able to upload associated documents (and be provided information on how to submit documents via alternative methods). When a user indicates he/she is ready to submit the SAR 7, the portal will run a check to confirm all required information has been provided. If the check identifies missing information the portal will alert the user to complete the specific missing information. Like the annual renewal, the account dashboard will inform the user when the SAR 7 is due. The SAR 7 due notification will be hidden once the user submits a complete SAR 7.  Note: The QR code feature in requirement 5 is not applicable to our solution. Our understanding is that, today, counties may have a QR code available on their website that links to their mobile app in the App Store. This is not relevant to our proposed solution, since we are developing a mobile responsive web app, allowing customers to upload documents from their mobile device directly within the web experience.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing a Responsive Web Design application allowing the application to be completed in many device format, including tablets by CBOs or smartphones by the users. It also allows the user to take a pic of their document(s).	6-40, 6-41	6.1.2			
FN 80	Functional	Mobile	The Contractor shall build the Mobile website with the following capabilities: a) Update all the pages to be scalable and responsive, work across multiple platforms and be rendered across widely used mobile devices/tablets b) Add Google Analytics or other similar capability to track Portal user traffic.	Y	<b>Deloitte Digital's solution meets this requirement</b> by designing responsive and adaptive portal pages that work across multiple web and mobile platforms, and device screens, including tablets. Additionally, our solution will be integrating Google Analytics to capture web portal usage analytics.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing a custom Google Analytics layer that abstracts the syntax and tagging of pages, enabling the Consortium to change analytics tools in the future without the need to make significant changes to the codebase. Additionally, our solution utilizes a Mobile-First design methodology, expanding the possibilities of responsive design by designing for the smallest screens and tap of a finger.	6-63, 6-67	6.1.10			

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FN 81	Functional	CBO Access	The Contractor shall build the Portal for CBOs with the following capabilities: a) Add the ability for CBO to create their own account and require approval by the county before a CBO can submit any applications; b) Add the ability for CBO's to maintain their staff account registrations. The county that approved the CBO will be responsible for activating or deactivating the CBO account; c) Deactivate passwords for users within a CBO account after 60 days of non-use. This does not include the main county approved CBO account. The user of the main county approved CBO account will be responsible for resetting the password d) Add hover-over function that includes application number to display First Name, Last Name, and DOB on un-submitted applications; e) Add a link to the application number to navigate to the application; f) Add the ability to remove an un-submitted application; g) Display data on dashboards in near real-time; h) Conduct a conversion impact assessment for existing CBO accounts; i) Add the ability to control what information is displayed to the CBOs. The details shall be defined during design.	Y	<b>Deloitte Digital's solution meets this requirement by:</b> a) Providing a simple approval framework that can be implemented during the CBO account creation process. b) Providing an administration module for CBOs to manage their staff registrations. Counties can have configurable security access to part or all of this module, such as the ability to activate/deactivate accounts. c) Providing a configurable password expiration timeframe for different account types (exceeding requirement because the timeframe is flexibly configurable to adapt to policy changes). d) Providing hover-over functionality in the UI design. e) Providing direct hyperlinks for key metadata items, such as Application Numbers. f) Providing the ability to delete unsubmitted application. g) Providing data on dashboards in near real-time (exceeding requirement by providing configurable timeframes to automatically refresh dashboard at regular intervals). i) Providing the ability to work with stakeholders during design to configure what information is displayed to the CBOs.  As part of the conversion process, the Deloitte Digital conduct a conversion assessment for existing CBO accounts to determine if there are duplicates or irregularities. The team will provide the findings to the Consortium to evaluate alternatives to address the duplicates and irregularities.  <b>Deloitte Digital's solution exceeds this requirement by</b> providing a custom Google Analytics layer that abstracts the syntax and tagging of pages and, if needed, allows the Consortium to change analytics tools without the need to make significant changes to the code base. Additionally, our solution utilizes a Mobile-First design methodology, expanding the possibilities of responsive design by designing for the smallest screens and tap of a finger.  <b>Additional potential services that could be requested:</b> Deloitte has an Alliance with Apple, allowing us to provide an Enterprise Design Lab (EDL) on the Apple Cupertino campus to focus on potential tablet views for CBOs to perform "clienttelling" work on tablets with the applicants. We could think through disconnected mode so CBOs in rural areas with limited internet access can also provide a similar level of service.	6-46	6.1.4			
FN 82	Functional	Training	The Contractor shall build the Portal Training materials as follows: a) Create/update existing Job Aids for Portal functions. b) Create/update Tutorials. c) Create/update WBTs - internal/external/CBOs and add these WBTs to the new Portal. d) Update ILTs - The requirement will be based on the decision on the Portal training environment. e) Robo Help User Guide to assist with implementation of new functionality.	Y	<b>Deloitte Digital's meets these requirements by</b> creating or updating Job Aids, online tutorials, WBTs, and user guides that can be consumed by stakeholders like County staff, application assisters, and authorized representatives. As there is no existing ILT that can be leveraged for the new portal, the Deloitte Team will provide assistance through up to 5 virtual sessions that coincide with the WBTs for system administrators and assisters prior to the Phase 1 go live. Reference Section 5.5.2 for more details.  <b>Deloitte Digital exceeds these requirements by</b> designing training with the future in mind. Additional launches will be made through M&O to enhance the Portal/Mobile App, so we aim to provide training templates that will be easy to update. In addition, our change management activities will prime stakeholders to anticipate improvements after go-live so that we can constantly improve their experience using the Portal/Mobile App.	5-100 6-73	5.5.2 6.1.13			
FN 83	Functional	Training	The Contractor shall build the Portal/Mobile training environment with the following capabilities: a) Build a Portal/Mobile production like training environment for all 58 Counties. The Portal/Mobile training environment shall interact with the SAWS training environment. b) Configure and maintain the Portal/Mobile training environment as well as provide support during the migration e-App case data creation process. c) Build a Portal/Mobile production like test environment for all 58 counties. This environment will interact with the CalSAWS test environments.	Y	<b>Deloitte Digital meets these requirements by</b> providing a Portal/Mobile App training environment for all 58 Counties that is a copy of a production-like test environment. This environment will interact with the SAWS training environment. Support will also be provided during the migration e-App case data creation process. A test environment will also be provided that will interact with the CalSAWS test environments.  <b>Deloitte Digital exceeds these requirements by</b> protecting confidential and personal information in both test and training environments. Identifiable information will be scrambled in the training environment for the development and delivery of training materials. Deloitte has a rigorous protocol for protecting and sharing information on a need-to-know basis.	5-90 5-100 6-73	5.4.2 5.5.2 6.1.13			
FN 84	Functional	Support Request	The Contractor shall build the ability for participants to request Volunteer Income Tax Assistance (VITA).	Y	<b>Deloitte Digital meets these requirements by</b> creating and providing the ability to allow clients to request for Volunteer Income Tax Assistance. Information via the Support Request function. These will be sent to CalSAWS to be routed to the appropriate unit.	6-72	6.1.12			

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FN 85	Functional	Application Process	The Contractor shall identify mandatory fields specific to programs using the SAWS 1 and/or SAWS 2.	Y	<b>Deloitte Digital's solution meets this requirement</b> by creating dynamic question flows that display all of the mandatory fields specific to each program (based on SAWS 1 and/or SAWS 2) requested.  <b>Deloitte Digital's solution exceeds this requirement</b> by storing all of the fields in a configurable reference data table, allowing the framework to understand which fields are mandatory for each program. Deloitte's base solution exceeds this requirement by having a "nudge engine" that actually can help prevent common misses and oversights or encourage users to insert non-mandatory information that will help the processing time and avoid extra case worker follow-ups.	6-34	6.1.2			
FN 86	Functional	Application Process	The Contractor shall build the Portal to collect SAWS2Plus information including but not limited to: a) Application demographic information b) Other people in the household c) Job/School d) Income e) Expenses f) Property g) Assets h) Other	Y	<b>Deloitte Digital's solution meets this requirement</b> by including all questions from the SAWS 2 Plus application, including all categories of information in sub-requirements A through H.  <b>Deloitte Digital's solution exceeds this requirement</b> because our base solution includes the majority of questions in SAWS 2 Plus, and has configurable field labels to accommodate the tailoring of the questions to align with the Consortium's and end users' needs. Deloitte's base solution exceeds this requirement by having a "nudge engine" that can help prevent common misses and oversights or encourage users to insert non-mandatory information that will help the processing time and avoid extra case worker follow-ups.	6-34	6.1.2			
FN 87	Functional	Application Process	The Contractor shall build the ability for applicants to apply for Retro Medi-Cal (3 months).	Y	<b>Deloitte Digital's solution meets this requirement</b> by permitting applicants to apply for retro active medical coverage (Retro Medi-Cal) for up to 3 months.  <b>Deloitte Digital's solution exceeds this requirement</b> by displaying the specific months in which they can request retro coverage. For example, if the user starts their application in September, our solution asks if they want to apply for the past months of June, July, and August. If the user starts working on their application and then comes back to finish it in the next month, they may see a message telling them that their options for getting benefits in the past three months have changed. This is because the user can apply for benefits only for the three months before the month in which they sign and submit their application.	Jun-42	6.1.2			
FN 88	Functional	Application Process	The Contractor shall build the ability for applicants with minors that are incarcerated with the Probation Dept to apply for benefits using the Probation Department Juvenile Identifier (PDJ) Number and directing these applications to a designated office within a county.	Y	<b>Deloitte Digital's solution meets this requirement</b> by supporting the collection of a Probation Department Juvenile (PDJ) Identifier number and using it, when entered, to route the application to a designated office within a County.  <b>Deloitte Digital's solution exceeds this requirement</b> by storing the configuration for each County's PDJ office routing in a reference table to allow the routing to change as needed.	6-39	6.1.2			
FN 89	Functional	Help	The Contractor shall build the following capabilities to support the Portal users: a) a webmaster link to display on all Portal pages. b) Click to Chat and Call Me functionality as available in the current C-IV c) Help desk functionality must allow for a screen share with the user to assist them in completing their submission.	Y	<b>Deloitte Digital's solution meets this requirement</b> by integrating with the statewide contact center software to provide Live Chat, Call Me Back, and Screenshare functionality. Additionally, our solution provides access to website support through a webmaster link located at the bottom of all pages in the portal.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing a dynamic form for the webmaster link that provides suggested solutions to common requests (e.g. password issues).	6-61	6.1.8			
FN 90	Functional	Application Process	The Contractor shall date and time stamp all Portal applications as determined by program policy.	Y	<b>Deloitte Digital's solution meets this requirement</b> by supporting program policy to set the appropriate date and time stamp for all submitted applications, changes, renewals, and documents.  <b>Deloitte Digital's solution exceeds this requirement</b> by supporting the ability to consider time of submission, weekends, and holidays when determining the program-driven date of submission.	6-39	6.1.2			
FN 91	Functional	Document Upload	The Contractor shall create a dynamic drop down that will list only the program specific verification forms for upload based on the application/case program or RE/RD.	Y	<b>Deloitte Digital's solution meets this requirement</b> because the solution will be tailored to display program-specific verifications/documentation. For the application submission process specifically, having this feature will help save application review and processing time for caseworkers, as Portal/Mobile App users can view all verifications needed for the program(s) being applied for up front and upload the documentation accordingly with their application submission.	6-55	6.1.6			

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Phase 1 - DD&I Functional					Contractor Response				For Consortium Use Only	
REQ#	Category	Sub-category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment	
FN 1	Functional	Home Page	The Contractor shall create two types of announcements to be displayed for Portal users once they are logged in on the home page: - Allow the 58 Counties to enter county specific announcements via security controlled by the county. - Allow the project to enter statewide announcements via security controlled by the Consortium.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability for homepage announcements to be created per user roles and county designations. Counties will have security-controlled access to post their own announcements, which will be displayed to logged in users located within that County as well as any unauthenticated user that is determined to be located in the county via a zipcode lookup (if entered by the user). State users with security-controlled access will also have the ability to send out statewide announcements that can be shown to all users regardless of County association and regardless of logged in status.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing both County and statewide announcements to be tailored and configured to display for certain groups of users. Announcements can be displayed to groups of users based on user type (client vs. CBO).	6-50, 6-51	6.1.5			
FN 92	Functional	Application Process	The Contractor shall build the Portal to send a real time confirmation email or text (based on option selected) to client if an email address and/or phone number is entered during account setup.	Y	<b>Deloitte Digital's solution meets this requirement</b> by sending real-time confirmation of application submission via email or text, based on the customer communication preferences and information entered during registration.  <b>Deloitte Digital's solution exceeds this requirement</b> by sending real-time confirmations for other submissions, including changes, renewals, semi-annual reports, and verification documents, assuming the user has opted in.	6-39	6.1.2			
FN 93	Functional	Application Process	The Contractor shall provide a report of applications that failed to transfer to CalSAWS after submission. County will designate staff to work with the Contractor to troubleshoot and resubmit.	Y	<b>Deloitte Digital's solution meets this requirement</b> by tracking the transfer status of all submitted applications and automatically generating a report for those that fail to transfer after an automated re-try process has also failed.  <b>Deloitte Digital's solution exceeds this requirement</b> by tracking the transfer of not just submitted applications, but also submitted changes, renewals, semi-annual reports, verification documents, and the storage of generated PDFs for the image repository. Our solution provides Opnsights, which allows for better and easier troubleshooting when errors occur.	6-37	6.1.2			
FN 94	Functional	Account Mgmt.	The Contractor shall build an additional layer of security/authentication (such as a separate code) for domestic violence (DV) confidential case Portal users. Also provide this user with the ability to opt-in/opt-out of Portal access/use due to DV/confidentiality to prevent un-authorized access.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability for users to indicate if their case is affected by a domestic violence situation. For these cases, users can opt in to continue allowing/using online access via an extra security code/question, or they can opt out of online access completely so that the case cannot be linked to an account or accessed online.  <b>Deloitte Digital's solution exceeds this requirement</b> by having a security and access control framework that comes with a default roles that can be configured to meet California's requirement. This security framework can control access to sections of the portal and individual screens, allowing the balance of long-term maintenance with the required granularity.	6-31	6.1.1			
FN 95	Functional	CBO Access	The Contractor shall allow the ability for counties to maintain county authorized CBO/FBO reference information on the Portal, as needed.	Y	<b>Deloitte Digital's solution meets this requirement</b> by letting Counties manage reference information for their CBO/FBOs, including contact and address information.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing the CBOs to update their limited information (per security and access control) as needed.	6-46	6.1.4			
FN 96	Functional	Mobile/Portal	The Contractor shall design the Mobile/Portal App to provide participant case status information.	Y	<b>Deloitte's base solution meets this requirement</b> by allowing clients to intuitively access their benefits and case status on the Mobile/Portal App dashboard.	6-52 6-63	6.1.5 6.1.10			
FN 97	Functional	Mobile/Portal	The Contractor shall design the Mobile/Portal App to provide cash or CalFresh benefits information.	Y	<b>Deloitte's base solution meets this requirement</b> by allowing clients to view their cash/CalFresh benefits information on the Mobile/Portal app dashboard.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing clients further insights into their CalFresh EBT account by displaying information such as EBT allocation start and end date, monthly spending, and recommended weekly budget amount.	6-52 6-65	6.1.5 6.1.10			
FN 98	Functional	Mobile/Portal	The Contractor shall design the Mobile/Portal App to provide xx days (to be defined) of EBT account balance information as approved by the Consortium during design.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing clients to view their EBT account balance on the Mobile/Portal dashboard and enabling the Consortium to configure the number of days EBT balance information is displayed for clients.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing clients further insights into their EBT account by displaying information such as EBT allocation start and end date, monthly spending, and recommended weekly budget amount.	6-53 6-63	6.1.5 6.1.10			
FN 99	Functional	EBT Locator	The Contractor shall provide a link to the EBT 'Locator' function for use within the Portal/Mobile App.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a link on the Dashboard for the client to use the EBT Locator functionality provided by the Consortium to help them find locations that accept EBT cards as payment.	6-50, 6-52	6.1.5			
FN 100	Functional	Mobile/Portal	The Contractor shall design the Mobile/Portal App to allow uploads of verification documents.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing clients to upload documents from their mobile devices and desktop computers.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing clients to take pictures of their documents on their mobile phones and upload the documents via the Portal/Mobile App.  <b>As a possible future enhancement</b> , our solution can be extended to take advantage of the Hylands document imaging system if the appropriate services are exposed to OCR, and classify and extract information from the images to automate downstream processes.	6-64	6.1.10			



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FN 101	Functional	Mobile/Portal	The Contractor shall design the Mobile/Portal App to allow uploads of verification documents submitted, RE/RDs, and to include but not limited to QR7/SAR7/Annual Redetermination.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing clients to upload documents, including RE/RDs, QR7/SAR7/Annual Redeterminations, from their mobile devices, tablets, and desktop computers.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing clients to take pictures of their documents on their mobile phones and upload the documents via the Portal/Mobile App. Our solution can be extended to take advantage of the Hylands document imaging system if the appropriate services are exposed to OCR, and classify and extract information from the images to automate downstream processes.	6-63	6.1.10			
FN 102	Functional	Account Mgmt.	The Contractor shall consolidate and convert current login IDs from the existing SAWS Portals.	Y	<b>Deloitte Digital's solution meet this requirement</b> by working with the Consortium to consolidate unique login IDs from the existing SAWS Portals and convert those to the new Portal. Non-unique login IDs can establish new credentials via the account creation process that integrates with CalSAWS.	6-29	6.1.1			
FN 103	Functional	New Feature - ICT	The Contractor shall initiate an alert to CalSAWS when a change of address reported through the Portal or mobile application may result in an Inter-County Transfer (ICT). Functionality must include ability to identify household members who are moving to the new address.	Y	<b>Deloitte Digital's solution meets this requirement</b> by sending an alert message to CalSAWS via the API when a user reports an address change that falls within a different county than their current county. The alert message will contain the household members who are moving to the new address. This type of change may cause an Inter-County Transfer (ICT) in CalSAWS.	6-71	6.1.11			
FN 104	Functional	Application Process	The Contractor shall ensure the Portal allows for a consumer user or application assister to designate Authorized Representatives.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing the consumer user or application assister to designate an Authorized Representative.  <b>Deloitte Digital's solution exceeds this requirement</b> by permitting the designation of not just Authorized Representatives, but also Legal Guardians and individuals with Power of Attorney. For Authorized Representatives, our solution collects electronic signatures of not just the applicant, but also of the Authorized Representative and a witness. Multiple Authorized Representatives can be entered, or in combination with Legal Guardians and individuals with Power of Attorney.	6-43	6.1.2			
FN 105	Functional	Support Request	The Contractor shall ensure the Portal allows for consumer users and application assisters to submit requests for time-limit extensions or domestic violence waivers.	Y	<b>Deloitte Digital meets these requirements</b> by allowing consumer users and assisters to request time limit extensions (in the form of exemption and/or good cause requests) or domestic violence waivers (in the form of good cause requests).	6-72	6.1.12			
FN 106	Functional	Mobile	The Contractor shall allow for a inactivity time out with a pop-up notification option for the Mobile user to either continue or exit the Mobile application.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing notification pop-ups to inform clients about session inactivity, allowing them to continue using the application or confirm to exit without losing any unsaved data. This inactivity notification will appear regardless of the type of device being used to access the responsive web application.  <b>Deloitte Digital solution exceeds this requirement</b> by providing an animated countdown timer in the pop-up, so that the user understands how much time they have until the session times out.	6-63	6.1.10			
FN 107	Functional	Regulatory	The Contractor shall design, build, deploy and maintain additions or changes to the Portal that are identified by new legislation as directed by the Consortium that can be implemented at go live as long as there is a reasonable timeframe to accommodate addition/change.	Y	<b>Deloitte Digital's solution meets this requirement</b> by utilizing our tailored hybrid agile approach that allows us to be flexible and adapt to new business requirements while applying our EHX methodology. This approach drives accurate implementation of the CalSAWS system in the event of changes to federal and state regulations and the changes must be captured through State's change request process with appropriate scope/schedule/budget impacts.	6-43	6.1.2			



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Phase 1 - DD&I Functional					Contractor Response				For Consortium Use Only	
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FN 1	Functional	Home Page	The Contractor shall create two types of announcements to be displayed for Portal users once they are logged in on the home page: - Allow the 58 Counties to enter county specific announcements via security controlled by the county. - Allow the project to enter statewide announcements via security controlled by the Consortium.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the ability for homepage announcements to be created per user roles and county designations. Counties will have security-controlled access to post their own announcements, which will be displayed to logged in users located within that County as well as any unauthenticated user that is determined to be located in the county via a zipcode lookup (if entered by the user). State users with security-controlled access will also have the ability to send out statewide announcements that can be shown to all users regardless of County association and regardless of logged in status.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing both County and statewide announcements to be tailored and configured to display for certain groups of users. Announcements can be displayed to groups of users based on user type (client vs. CBO).	6-50, 6-51	6.1.5			
FN 108	Functional	Enhanced - Analytics and Reporting	Contractor shall design, build, deploy, and maintain the Portal with the following capabilities: a) Analytic elements that assess the overall utilization of the Portal and for sub-target populations. b) Exact data elements to be used for such assessments shall include, but not be limited to: - the geolocation of visitors - the screens used during each visit and the sequence of screens - the last screen and data element used before visit termination - the success or failure to complete the application process - the number of visits before successful completion - and all other analytic elements that may show bottlenecks or difficulties in the use of the Portal.	Y	<b>Deloitte Digital's solution meets this requirement</b> by tracking usage of the portal using Google Analytics. Our approach to Google Analytics integration permits tracking of page visits and specific events within pages. Using Google Analytics, we will produce reports as described in FN 108 b.	6-57	6.1.7			
FN 109	Functional	Languages	Until all Phase 1 and Phase 2 language translations are available, the Contractor shall propose a solution to provide an alternative workaround to address recipient requests for materials in languages other than threshold languages proposed in Phase 1.	Y	<b>Deloitte Digital's solution meets this requirement</b> by displaying a Consortium-approved instructional message to the user upon selecting a Phase 2 language. This instructional message will be displayed in the language of their selection, and will direct the user to alternative Consortium resources for assistance (e.g. instruct the user to contact translation services via phone, access translated manual forms, or apply automated translation using the Chrome web browser).	6-62	6.1.9			

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Phase 2 - Optional Enhancements					Contractor Response				For Consortium Use Only	
	REQ#	Category	Sub Category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment
FN	110	Functional	New Feature - Survey	The Contractor shall create an On-line Survey for the Applicant/Participant to complete. Completion of the survey is optional.	Y	<p><b>Deloitte Digital's solution meets your requirement</b> by creating an online survey that an applicant or participant can optionally complete.</p> <p><b>Deloitte Digital's solution exceeds your requirement</b> by leveraging industry leading tools to support an accurate customer experience measurement that allows the Consortium to identify points of friction for improvement, set priorities among collected feedback, identify recurring issues proactively, and measure the success of releases and enhancements. In addition, Deloitte Digital will deliver this requirement as part of Phase 1.</p>	6-135	6.3.6		
FN	111	Functional	Location Services Enhancement	The Contractor shall display Portal announcement based on the user input of zip code or use of location services.	Y	<p><b>Deloitte Digital's solution meets your requirement</b> by displaying portal notifications/announcements based on the user's zip code input or use of location services.</p> <p><b>Deloitte Digital's solution exceeds your requirement</b> by enabling users to opt-in or opt-out of using their device location services and, if the user enables the service, utilizing the location service capability to recommend their current location automatically. In addition, Deloitte Digital will deliver this requirement as part of Phase 1.</p>	6-51	6.1.5		
FN	112	Functional	New Services - Voice Response	The Contractor shall deploy Voice Response features in support of compliance with the American Disability Act (ADA).	Y	<p><b>Deloitte Digital's solution meets your requirement</b> by developing an ADA-compliant responsive web application that meets the standards of W3C Web Content Accessibility Guidelines (WCAG) 2.0 Level AA as well as accommodating people using assistive technology such as voice readers to access any information, field elements, and other functionality required to use the application. Deloitte Digital will deliver this requirement as part of Phase 1.</p>	6-139	6.3.8		
FN	113	Functional	New Services - Voice Response	The Contractor shall design, build, deploy, and maintain Portals including, but not limited to, the following: A web Portal designed for desktop / laptop computers. A web Portal designed for smart phones / tablets. An interactive voice Portal with a natural language interface in all required languages with skills linking them to major smartphone interfaces (e.g. Alexa, Siri, OK Google, Bixby, Facial Recognition, and others) as approved by the Consortium.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by designing, building, deploying and maintaining a voice portal with a natural language interface that can be used on smart phones and assistant-enabled devices like smart speakers (e.g., Google Home). This portal will be built using the Google Assistant platform and support 3 "intents" (i.e. questions) in all threshold languages supported by the Google platform, which includes: English, Spanish, Cantonese (Chinese), Korean, Mandarin (Chinese), Portuguese, Russian, Hindi, and Japanese. Our solution will integrate with our Portal/Mobile App solution services to retrieve and respond with data about Frequently Asked Questions (FAQs).</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by providing a digital assistant capability that can be extended, as an additional enhancement, to a text-based chatbot capability that could be embedded directly within the Mobile/Portal App solution web interface. Our approach re-uses the same "fulfillment logic" as the voice assistant, so that responses are consistent across platforms.</p>	6-138	6.3.8		
FN	114	Functional	Languages	The Contractor shall design, build, deploy and maintain the CalSAWS Portal application, including help features in the following State approved threshold languages: Arabic, Farsi, Hindi, Khmer, Japanese, Mien, Punjabi, Thai, Ukrainian.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by supporting additional languages provided by the Consortium (i.e. Arabic, Farsi, Hindi, Khmer, Japanese, Mien, Punjabi, Thai, Ukrainian).</p>	6-62	6.1.9		
FN	115	Functional	Languages	The Contractor shall design, build, deploy and maintain the CalSAWS mobile application, including Help features, in the following State approved threshold languages: Arabic, Farsi, Hindi, Khmer, Japanese, Mien, Punjabi, Thai, Ukrainian.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by supporting additional languages provided by the Consortium (i.e. Arabic, Farsi, Hindi, Khmer, Japanese, Mien, Punjabi, Thai, Ukrainian).</p>	6-62	6.1.9		
FN	116	Functional	New Feature - Managed Care Plans	The Contractor shall build, deploy and maintain the ability to update beneficiary contact and demographic information provided by Medi-Cal managed care plans or other entities as designated by DHCS.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by sending updates to beneficiary contact and demographic information to CalSAWS and, optionally, directly to MEDS to enable the Managed Care Plans to receive updated information. If an enrollee communicates contact or demographic updates to a Managed Care Plan, our Portal/Mobile App solution will receive the update through a CalSAWS interface.</p>	6-129	6.3.4		
FN	117	Functional	New Feature - CalWORKs 2.0	The Contractor shall build, deploy and maintain web version of the CalWORKs 2.0 tools for clients to complete, submit, and update (displaying the last version's information for update).	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by adding the client-facing version of CalWORKs 2.0 to support goal-oriented service delivery, enabling client to complete, submit, and update assessments consistent with program policy</p>	6-124	6.3.2		
FN	118	Functional	New Feature - CalWORKs 2.0	The Contractor shall build, deploy and maintain the ability to allow counties to export or download CalWORKs 2.0 raw data.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by enabling the appropriate access for the County case managers to download the export or download CalWORKs 2.0 data to CSV format, which can be easily opened in other tools such as Microsoft Excel or Access for additional analysis. Access to CalWORKs 2.0 is easily configurable by Consortium site administrators.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by supporting the ability to mask sensitive PII information during extraction, if the Consortium deems it preferable.</p>	6-124	6.3.2		

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Phase 2 - Optional Enhancements					Contractor Response				For Consortium Use Only	
	REQ#	Category	Sub Category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment
FN	119	Functional	New Feature - CalWORKs 2.0	The Contractor shall ensure that the Portal allows consumer users and application assisters to request CalWORKs related supportive services through the Portal, for example transportation, child care, books for students, etc.	Y	<b>Deloitte Digital's solution meets this requirement</b> by adding the supportive services request page in the Portal/Mobile App solution. Clients will utilize this page to request the appropriate support services based on their needs.	6-124	6.3.2		
FN	120	Functional	Support Request	The Contractor shall build the ability of a WtW participant to request reimbursement.	Y	<b>Deloitte Digital's solution meets this requirement</b> by allowing WtW participants to submit details of expenses requesting reimbursement such as transportation or mileage. Our dynamic form permits more than 1 expense request per form submission.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.	6-132	6.3.5.1		
FN	121	Functional	Support Request	The Contractor shall build the ability of a WtW participant to request child care and input the hours of participation.	Y	<b>Deloitte Digital's solution meets this requirement</b> to request Child Care by capturing hours worked in the month by each day of the month; capturing normal work hours; and, capturing each child and provider that provided child care along with amount paid. The portion that Provider must complete must be submitted as a form attachment.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.	6-133	6.3.5.1		
FN	122	Functional	Support Request	The Contractor shall build the ability to complete the WTW 10 online to request a third party assessment.	Y	<b>Deloitte Digital's solution meets this requirement</b> by capturing a simple 1-question request for third-party assessment (WTW 10 Form).  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.	6-132	6.3.5.1		
FN	123	Functional	Support Request	The Contractor shall build the ability to allow HA clients to submit a housing search form.	Y	<b>Deloitte Digital's solution meets this requirement</b> by supporting the Housing Search Form, which includes capturing dates, names, and contact information of people the participant has talked with to seek housing, along with reason why the place wasn't rented. Our dynamic form permits multiple contacts to be submitted at one time.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.	6-134	6.3.5.1		
FN	124	Functional	Support Request	The Contractor shall build the ability to allow WtW participants to submit a job search.	Y	<b>Deloitte Digital's solution meets this requirement</b> by capturing details about the WtW participant's activity seeking employment (i.e. job search activities, hours, participation, job contacts). Our dynamic form permits more than 1 activity to be submitted at a time.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.	6-132	6.3.5.1		
FN	125	Functional	Support Request	The Contractor shall build the ability to request temporary Homeless Assistance, including a voucher request.	Y	<b>Deloitte Digital's solution meets this requirement</b> by capturing no more than 20 questions relevant to seeking temporary Homeless Assistance.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.	6-134	6.3.5.1		

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Phase 2 - Optional Enhancements					Contractor Response				For Consortium Use Only	
	REQ#	Category	Sub Category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment
FN	126	Functional	Support Request	The Contractor shall build the ability to request permanent Homeless Assistance, including the method of the issuance of such payment.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by capturing no more than 20 questions relevant to seeking permanent Homeless Assistance.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.</p>	6-134	6.3.5.1		
FN	127	Functional	Support Request	The Contractor shall build the ability to allow clients to submit a Sworn Statement of evidence in accordance with program policy, excluding pregnancy verification and alien status.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by capturing a sworn statement of evidence for verifications, excluding situations where it is not permissible (pregnancy and alien status verification).</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.</p>	6-134	6.3.5.1		
FN	128	Functional	Support Request	The Contractor shall build the ability to allow WtW participants to request exemptions from WtW.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by capturing a simple yes/no response from WtW participants for WtW exemption requirement criteria.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.</p>	6-132	6.3.5.1		
FN	129	Functional	Support Request	The Contractor shall build the ability to allow clients to request recurring and nonrecurring special needs.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by capturing a request for special needs. Our dynamic form permits more than one special need to be selected and specification of frequency for each.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.</p>	6-133	6.3.5.1		
FN	130	Functional	Support Request	The Contractor shall build the ability to allow CalFresh clients to request program exemptions.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by allowing CalFresh clients to submit requests for program exemptions (i.e. student eligibility).</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.</p>	6-134	6.3.5.1		
FN	131	Functional	Support Request	The Contractor shall build the ability of a sanctioned WtW participant to request that the sanction be cured and request supportive services to cure the sanction.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by capturing a simple 1-question request for a sanction cure (i.e. plan) and support services (i.e. transportation, child care, training/educational expenses) form a sanctioned WtW participant.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.</p>	6-133	6.3.5.1		
FN	132	Functional	Support Request	The Contractor shall build the ability to display and capture the signature in support of an agreement to cure a sanction.	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by capturing an electronic signature in relation to agreement to a county-provided plan to cure a sanction.</p> <p><b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.</p>	6-133	6.3.5.1		

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Phase 2 - Optional Enhancements					Contractor Response				For Consortium Use Only	
	REQ#	Category	Sub Category	Requirements	Requirement Met (Y/N)		Page #	Section #	REC Met	Reviewer Comment
FN	133	Functional	Support Request	The Contractor shall build the ability to complete and submit the "Yslas" WtW 8 form for students.	Y	<b>Deloitte Digital's solution meets this requirement</b> by capturing a simple 1-question request to start or end use of financial aid funds for supportive services that can be paid for by CalWORKs ("Yslas" WtW 8 form). If starting use of financial aid funds, our dynamic form will permit user to specify which supportive services apply along with monetary amount (per period) and start and end dates.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.	6-133	6.3.5.1		
FN	134	Functional	Support Request	The Contractor shall build the ability to submit WtW Forms 26 and 27.	Y	<b>Deloitte Digital's solution meets this requirement</b> by capturing the reason(s) for requesting good cause determination (WtW Forms 26 and 27). Our dynamic form permits the user to select more than one reason and provide a free-text "Other" reason, if applicable.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.	6-133	6.3.5.1		
FN	135	Functional	New Feature - Time Clocks	The Contractor shall build the ability to view and modify time clocks.	Y	<b>Deloitte Digital's solution meets this requirement</b> by integrating with the CalSAWS system for time clock data for display and modification in alignment with program policy.	6-137	6.3.7		
FN	136	Functional	Support Request	The Contractor shall build the ability of CalFresh clients to request medical expenses.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing a dynamic form that captures special medical expense deductions (i.e. type of expense, amount, pay frequency, reimbursement eligible) for CalFresh clients. Our dynamic form permits multiple medical expenses to be submitted at one time.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.	6-134	6.3.5.1		
FN	137	Functional	New Feature - Notifications	The Contractor shall notify clients of required reporting based on household eligibility, such as "IRT Reminder" or "ABAWD Hours Reminder". Should be customized to the household and populated near the top of the home page after logging in.	Y	<b>Deloitte Digital's solution meets this requirement</b> by populating and publishing household-based custom reminder notifications for IRT and ABAWD Hours near the top of the home page.  <b>Deloitte Digital's solution exceeds this requirement</b> by allowing clients to save and print reminder notifications. In addition, Deloitte Digital will deliver this requirement as part of Phase 1.	6-71	6.1.11		
FN	138	Functional	New Feature - Data Analytics and Reporting Tool	The Contractor shall develop, deploy and maintain a self-service data analytics and reporting tool that supports configurability of capture and reporting by state and county staff.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing the SEMOSS reporting tool, which supports the configurability of capture and reporting by State and County staff.	6-123	6.3.1		
FN	139	Functional	Support Request	The Contractor will create a dynamic question section, triggered by those who appear to meet the definition of an ABAWD (per policy), that allows the consumer user to check off any of the possible reasons they may be eligible for an exemption. These responses are to be transmitted to the worker, along with the application and any other information, for review and determination of the case.	Y	<b>Deloitte Digital's solution meets this requirement</b> by capturing reasons(s) household is requesting ABAWD exemption or providing information about how they are already meeting the work requirement. This form will be made available to those who appear to meet the definition of an ABAWD (based on their known household information provided by CalSAWS). The completed form will be transmitted to the worker, along with supporting documentation.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing an online web-based version of the form within the account that prefills limited information that is already known about the participant. Additionally, our solution allows the user to upload supporting documentation and forms to accompany the request and provides a PDF receipt upon submission.	6-134	6.3.5.1		

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Phase 2 - Optional Enhancements					Contractor Response				For Consortium Use Only	
	REQ#	Category	Sub Category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment
FN	140	Functional	New Feature - Analytics and Reporting	The Contractor shall conduct an annual data element audit and normalization function to ensure consistency by consolidating redundant multiple data elements for the same functional description.	Y	<b>Deloitte Digital's approach meets this requirement.</b> On an annual basis, we will conduct a data element audit of the OLTP and reporting instance to identify potential data redundancies. This augments the process that we will follow as part of our standard design processes as outlined in Section 5 of our proposal response. The Deloitte Digital Team will share the results of the annual audit with the Consortium along with a recommended action to normalize the relational data. The Deloitte Digital Team will take action to resolve based on the root cause analysis and input from data stewards from the Counties and Consortium. . Deloitte Digital will deliver this requirement as part of Phase 1.  <b>Deloitte Digital's solution exceeds this requirement</b> by archiving any redundant data that is found as part of the annual audit to an AWS S3 archive to preserve the original record, while keeping the transactional system and reports performing optimally.	6-59	6.1.7		
FN	141	Functional	New Feature - Analytics and Reporting	The Contractor shall design and build portal systems such that data elements determined to be key to the assessment of effectiveness may be identified and made accessible to users during the period of system stabilization and during the period of operations.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing views of data elements that are key to the determination of the effectiveness of the Portal/Mobile App solution to authorized users throughout stabilization and into ongoing operations. Deloitte Digital will deliver this requirement as part of Phase 1.	6-59	6.1.7		
FN	142	Functional	New Feature - Analytics and Reporting	The Contractor shall design, build, deploy, and maintain a core set of management reports for the use of program administrators. Contractor shall provide such reports for review and refinement by local subject matter experts in multiple counties to ensure the reports are accurate and user-friendly. Such review and refinement shall take place during the design period, system stabilization period, and maintenance period.	Y	<b>Deloitte Digital's solution meets this requirement</b> by designing, building, deploying, and maintaining a set of up to 8 management reports across a defined set of focus areas as described in our narrative in Section 6.1.7. During design, system stabilization, and maintenance we will provide these reports to local subject matter experts in the counties to review for report accuracy, usefulness, and ease-of-use, and refine them as agreed upon with the Consortium.	6-59	6.1.7		
FN	143	Functional	New Feature - Analytics and Reporting	The Contractor shall design, build, maintain, and deploy API's that allow for regular data extracts to be retrievable in easily-usable formats (e.g. Excel, Access, SQL tables) that allow for the meaningful analysis of essential Portal functions. Such Portal functions shall include but not be limited by application submittal rates and outcomes by submitter demographics, by application assister, by day of week, by time of day, by type of device(s) used.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing an API to support data extract to CSV to allow for report consumers to make further use of the information about essential portal functions in their needed format.  <b>Deloitte Digital's solution exceeds this requirement</b> by providing the ability to export visualizations to JPEG or SVG formats.	6-123	6.3.1		
FN	144	Functional	New Feature - Analytics and Reporting	The Contractor shall design, build, deploy, and maintain a regularly updated reporting database that allows for ad hoc exploration of relevant variables.	Y	<b>Deloitte Digital's solution meets this requirement</b> by designing, building, deploying, and maintaining a reporting solution that enables users to explore variables of interest, execute ad hoc analysis, and produce visualizations based on the retrieved data (based on the variables used to produced the reports for Phase 1 reporting functionality). Our solution supports data aggregation at the State, Consortium, and County level.	6-123	6.3.1		
FN	145	Functional	New Feature - Analytics and Reporting	The Contractor shall conduct a periodic, no less than annual, process to review and improve standard data extracts and management reports and consult with county and state stakeholders to ensure they continue to meet key management and evaluation objectives.	Y	<b>Deloitte Digital's solution meets this requirement</b> by annually reviewing all management reports, extracts and APIs to confirm that they meet the needs of the Consortium. If changes are requested, we will work with the Consortium to prioritize modifications working within the agreed upon change control process.	6-123	6.3.1		
FN	146	Functional	New Feature - GROW	The Contractor shall design, build, deploy and maintain the ability for GROW (General Relief Opportunities for Work) collaborators/external users to request an account and reset/change password.	Y	<b>Deloitte Digital's solution meets this requirement</b> by enabling GROW collaborators and users to request an account and reset the passwords for the account.	6-123	6.3.3		
FN	147	Functional	New Feature - GROW	The Contractor shall design, build, deploy and maintain the ability for potential GROW participants, without a Portal account, to search for services or job orders documented by name, type, category, distance, etc. These users can see basic information like name, address, service, phone number, web site, distance, etc.	Y	<b>Deloitte Digital's solution meets this requirement</b> by providing un-authenticated access to search for services and job orders by name, type category, and distance.	6-123	6.3.3		

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Phase 2 - Optional Enhancements					Contractor Response				For Consortium Use Only	
	REQ#	Category	Sub Category	Requirements	Requirement Met (Y/N)		Page #	Section #	REQ Met	Reviewer Comment
FN	148	Functional	New Feature - GROW	<p>The Contractor shall design, build, deploy and maintain the ability for GROW for collaborators/external users to maintain basic resource databank information via the Portal such as:</p> <p>a) View, add or edit resource contact information (address, contact person name and phone/fax number, hours of operation and internet information)</p> <p>b) Update services provided (address, whether or not service is accessible by public transportation, phone number, hours of operation and contact person)</p> <p>c) Update activities provided</p> <p>d) Update participant's attendance and performance in an activity (this will include adding or removing a participant)</p> <p>e) View, add or edit job orders for employers</p> <p>f) View, add or edit child care wait list resources</p> <p>g) Ability to generate report (attendance list for the activity).</p>	Y	<p><b>Deloitte Digital's solution meets this requirement</b> by adding the administrative functions for the collaborators/authorized external users to manage and maintain their resource databank in the solution as specified in a–g in FN 148.</p>	6-123	6.3.3		

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Staffing			CONTRACTOR Response				For Consortium Use Only	
REQ#	Category	Requirements	Requirement Met (Y/N)	CONTRACTOR Comment	Page #	Section #	REQ Met	Reviewer Comment
ST 1	Staffing	The Contractor shall provide all staff necessary to fulfill the Portal/Mobile App Services requirements defined in this RFP.	Y	<b>Deloitte Digital meets this requirement</b> by proposing the staff necessary to fulfill the Portal/Mobile App Services requirements defined in this RFP.	7-8 7-30 7-36	7.2 7.4.1 7.5.2		
ST 2	Staffing	The Contractor shall employ an approach for staff management that facilitates a productive working relationship with Consortium staff, DD&I Contractor staff, and stakeholder/advocate staff and progresses towards task completion. The Consortium shall minimize staff turnover to the extent possible, particularly for Key Staff.	Y	<b>Deloitte Digital meets this requirement</b> by providing a detailed narrative description of the interaction between Deloitte and Consortium staff and stakeholders, an org chart with relationships between our staff, the Consortium, and the DD&I contractor, and our approach to minimizing turnover and 5-step process for addressing staff changes.  <b>Deloitte Digital exceeds this requirement</b> by providing details on the estimation process that uses standardized input and state-specific requirements to provide a realistic deliverable-based staffing plan.	7-8 7-27 7-37	7.2 7.3 7.5.3		
ST 3	Staffing	The Contractor shall ensure all Contractor staff clearly understand both initial and ongoing roles and responsibilities, and how the team and assignments relate to the Portal/Mobile App DD&I effort as well as the overall CalSAWS Migration Project plan.	Y	<b>Deloitte Digital meets this requirement</b> by explaining to proposed staff the roles and project they are being considered for during the vetting process for new project team members. We further document roles and responsibilities in the project staffing plan which is provided to all new project members. The project staffing plan includes all roles, including non-non-key staff roles defined in Attachment I – Application Support Role Definition.	7-31 7-38 I-1	7.4.2 7.5.3 Attachment I, Application Support Role Definition		
ST 4	Staffing	The Contractor Staff approach must address and demonstrate the following requirements: a) All proposed Contractor staff must have good oral and written communication skills. One aspect of good oral communication skills includes the ability to communicate with diverse groups of users as part of the UCD process and to convey IT terms and concepts to non-technical audiences. b) All Contractor project staff must be eligible to work in the State of California. c) All Contractor staff are expected to actively participate in designated project meetings and represent the best interests of the Consortium, identify and escalate issues as appropriate, and contribute to required weekly and monthly status reports.	Y	<b>Deloitte Digital meets this requirement</b> by only employing people who are eligible to work in the United States. Our recruiting processes requires formal face-to-face interviews to measure oral communication skills, and resumes and written answers to questions to gauge writing skills. All our User Engagement team members bring extensive experience working in group settings to facilitate requirements using UCD methods as denoted in their resume. Also our of our technologists are required to enroll in Deloitte's Communication 4 Technologists program that assist with communicating complex technology concepts into simple terms. Lastly, staff our trained on project risk and issue management processes when they join the project and partnered with an on-boarding coach who is an existing team member they can turn to for questions on project processes.	7-31 7-38 I-1	7.4.2 7.5.3 Attachment G, Key Staff Resumes/Staff Qualifications		
ST 5	Staffing	The Portal/Mobile App Contractor Project Manager is responsible for: a) Managing the scope of services, their team and administering the Agreement. b) Ensuring the Project receives company support, commitment, and oversight to meet or exceed all its contractual requirements. c) Decision-making authority to bind the Contractor contractually to all terms and conditions in the Agreement. d) Accountability for Staff performance.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Project Manager Gabrielle Otis, who has relevant experience performing in this capacity and a clear understanding of the role, compliant with this requirement and detailed in our narrative response. Her responsibilities are inclusive of those noted in this requirement.	7-25 G-1	7.2.4 Attachment G, Key Staff Resumes/Staff Qualifications		
ST 6	Staffing	The Project Manager responsibilities shall include, but not be limited to, the following: a) Ensuring the Contractor team understands the scope of the Agreement and the Project's role in the "big picture" of the CalSAWS Migration Project, including how to work in concert with the Consortium, Counties, state, stakeholders, advocates, clients and other Contractors. b) Overseeing the development and delivery of all Contractor Deliverables, tasks and services and ensuring they are of the highest quality and are delivered in accordance with the approved work plan. c) Participating in ongoing communications and status updates to the CalSAWS Board of Directors, Project Steering Committee (PSC), State and Federal Stakeholders as directed by the Executive Director.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Project Manager, Gabrielle Otis who has relevant experience performing in this capacity and a clear understanding of the role, compliant with this requirement and detailed in our narrative response. Her responsibilities are inclusive of those noted in this requirement.	7-25 G-1	7.2.4 Attachment G, Key Staff Resumes/Staff Qualifications		



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Staffing				CONTRACTOR Response				For Consortium Use Only	
REQ#	Category	Requirements	Requirement Met (Y/N)	CONTRACTOR Comment	Page #	Section #	REQ Met	Reviewer Comment	
ST 7	Staffing	The Project Manager shall have a minimum of five (5) years of experience managing an IT Project using a defined system development life cycle (SDLC), including business and system requirement specifications, design, development, testing, and implementation.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Gabrielle Otis, who has at least the minimum five years of experience in IT project management roles and by providing completed Attachment G – Key Staff Resumes/Qualifications.  <b>Deloitte Digital exceeds this requirement</b> by proposing Gabrielle Otis, who has eight years of experience in IT project management roles and by providing completed Attachment G – Key Staff Resumes/Qualifications.	7-14 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications			
ST 8	Staffing	It is desirable that the Project Manager shall have a PMI PMP Certification.	Y	<b>Deloitte Digital meets this desirable requirement</b> as our proposed Project Manager Gabrielle Otis has a PMI PMP certification.  <b>Deloitte Digital exceeds this desirable requirement</b> as our proposed Project Manager Gabrielle Otis also has Scrum and ITIL certifications demonstrating not only her project management experience, but also employing those skills in technology project like the Portal/Mobile App project.	7-14 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications			
ST 9	Staffing	The Project Manager shall have a minimum of five (5) years of experience leading the development of Deliverables on IT Projects.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Project Manager Gabrielle Otis, who has a minimum of five years of experience leading the development of Deliverables on IT Projects.  <b>Deloitte Digital exceeds this requirement</b> by proposing Project Manager Gabrielle Otis, who has 12 years of experience in IT projects and deliverable creation/submission.	7-14 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications			
ST 10	Staffing	The Project Manager shall have experience managing a team of 5 or more people.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Project Manager Gabrielle Otis, who has experience managing a team of five or more people.  <b>Deloitte Digital exceeds this requirement</b> by proposing Project Manager Gabrielle Otis, who has experience managing teams of more than 5 and up to 32 team members for the last 10 years.	7-14 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications			
ST 11	Staffing	The Application Development Lead is responsible for: a) The overall design and development of the Portal/Mobile Application. b) Monitoring and coordinating technical support activities including defining the hardware services and software configuration, defining the programming and testing environments and developing the performance model.	Y	<b>Deloitte Digital exceeds this requirement</b> by proposing Jerald Nielson for the App Development Lead role. Jerald has 18 years of experience completing all of these tasks. His responsibilities are inclusive of those noted in this requirement.	7-25	7.2.4			
ST 12	Staffing	The Application Development Lead shall: a) Provide technical direction for development, design, and integration of the Portal/Mobile App. b) Participate in the development of user engagement to ensure technical deliverables meet the needs of users. c) Lead the development of all technical design and development Deliverables. d) Plan, prepare for and manage all technical development tasks and resources in accordance with the approved work plan; e) Work closely with a variety of teams to assess, advise, plan, design, build and implement a cloud services solution. f) Engage with current SAWS vendors in communication and coordination of the infrastructure hosting and operations support functions.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Application Development Lead Jerald Nielson, who has relevant experience in performing in this capacity and has a clear understanding of the role, complies with this requirement and is detailed in our narrative response. His responsibilities are inclusive of those noted in this requirement.	7-25	7.2.4			

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Staffing			CONTRACTOR Response				For Consortium Use Only	
REQ#	Category	Requirements	Requirement Met (Y/N)	CONTRACTOR Comment	Page #	Section #	REQ Met	Reviewer Comment
ST 13	Staffing	The Application Development Lead shall: a) Coordinate with other vendors in making modifications to the current LRS, C-IV, and CalWIN systems to integrate and interface with the Portal/Mobile App technical infrastructure. b) Analyze the technical business needs and requirements to ensure Portal/Mobile App infrastructure is designed to support SAWS integration and ongoing operations. c) Document and maintain detailed design and configuration documentation/diagrams for infrastructure storage, compute, virtualization, network and security. d) Maintain and monitor cloud performance and recommend optimization alternatives within the infrastructure for ongoing performance improvements, capacity management and cost efficiencies. e) Perform risk analysis to identify IT security issues and remediate plans. Identify and/or mitigate operational risks where appropriate.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Application Development Lead, Jerald Nielson who has relevant experience in performing in this capacity and has a clear understanding of the role, that complies with this requirement and is detailed in our narrative response. His responsibilities are inclusive of those noted in this requirement.	7-25	7.2.4		
ST 14	Staffing	The Application Development Lead shall have a minimum of seven (7) years of experience in the development, implementation and management of information technology infrastructure and IT systems, including cloud architectures, business systems, server technologies, and communication technologies.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Application Development Lead Jerald Nielson who has a minimum of seven years of experience in the development, implementation, and management of Information Technology (IT) infrastructure and IT systems, including cloud architectures, business systems, server technologies, and communication technologies.  <b>Deloitte Digital exceeds this requirement</b> by proposing Application Development Lead Jerald Nielson, who has 18+ years of experience in the development, implementation and management of information technology infrastructure and IT systems, business systems, server technologies, and communication technologies, and 2.5 years in cloud architecture. Jerry also was the App Development manager for the base CalSAWS solution, LRS, which further reduces risk for the Consortium as it integrates the Portal/Mobile App with CalSAWS.	7-16 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications		
ST 15	Staffing	The Application Development Lead shall have a Bachelor's Degree in Information Systems and/or similar Technical Degree and/or four (4) years of demonstrated experience in infrastructure operations development and management, including the development and implementation of telecommunication systems, networks, and webservice interfaces.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Application Development Lead Jerald Nielson, who has a minimum of four years of demonstrated experience in infrastructure operations development and management, including the development and implementation of telecommunication systems, networks, and webservice interfaces.  <b>Deloitte Digital exceeds this requirement</b> by proposing Application Development Lead Jerald Nielson, who has 18 years of demonstrated experience in the infrastructure operations development and management, including the development and implementation of telecommunication systems, networks, and webservice interfaces.	7-16 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications		
ST 16	Staffing	The Portal/Mobile App Test Lead is responsible for: a) Planning, preparing for and executing all system test, regression test and UAT tasks, Deliverables, resources and environments. b) Training and working collaboratively with Consortium, county, stakeholder, advocate and client staff participating in the UAT effort.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Test Lead Kimberly King, who has relevant experience in performing in this capacity and has a clear understanding of the role, complying with this requirement and detailed in our narrative response. Her responsibilities are inclusive of those noted in this requirement.	7-25	7.2.4		
ST 17	Staffing	The Test Lead shall: a) Lead the development of all test related Deliverables. b) Plan, prepare for and manage all test tasks and resources in accordance with the approved Portal/Mobile App Work Plan and Master Test Plan. c) Coordinate all system test and UAT environment builds, modifications and deployments. d) Train UAT testers on the concept of UAT, how to work in accordance with the UAT Plan, how to develop and execute UAT scripts, how to conduct unscripted testing, how to document test results and deficiencies in the appropriate tools and retest requirements once deficiencies are corrected. e) Document and track all requirements met through the system test and UAT tasks. f) Provide recommendations to the Consortium regarding the feasibility of promoting the application into the production environment based on system, UAT and regression test results and exit criteria.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Test Lead Kimberly King, who has relevant experience in performing in this capacity and has a clear understanding of the role, complying with this requirement and detailed in our narrative response. Her responsibilities are inclusive of those noted in this requirement.	7-25	7.2.4		

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Staffing			CONTRACTOR Response				For Consortium Use Only	
REQ#	Category	Requirements	Requirement Met (Y/N)	CONTRACTOR Comment	Page #	Section #	REQ Met	Reviewer Comment
ST 18	Staffing	The Test Lead shall have a minimum of two (2) years of experience in a test leadership role for a Project with over 1,000 concurrent users.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Test Lead Kimberly King, who has a minimum of two years of experience in a test leadership role for a project with over 1,000 concurrent users.  <b>Deloitte Digital exceeds this requirement</b> by proposing Test Lead Kimberly King, who has 45 months of experience in a test leadership role for 2 projects having 4,000 and 4,500 concurrent users respectively.	7-18 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications		
ST 19	Staffing	The Test Lead shall have a minimum of five (5) years of experience planning, preparing for and executing system test, UAT and/or regression tests in compliance with a recognized standard, such as IEEE or ISO.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Test Lead Kimberly King, who has a minimum of five years of experience planning, preparing for, and executing system test, UAT, and/or regression tests in compliance with a recognized standard, such as IEEE or ISO.  <b>Deloitte Digital exceeds this requirement</b> by proposing Test Lead Kimberly King, who has 17 years of experience planning, preparing for and executing system test, UAT and/or regression tests in compliance with a recognized standard, such as IEEE or ISO.	7-18 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications		
ST 20	Staffing	The Test Lead shall have a minimum of three (3) years of experience with Health and Human Services systems Projects.	Y	<b>Deloitte Digital meets this requirement</b> by proposing Test Lead Kimberly King, who has a minimum of three years of experience with Health and Human Services systems projects.  <b>Deloitte Digital exceeds this requirement</b> by proposing Test Lead Kimberly King, who has 14.5 years of experience with Health and Human Services systems projects. This includes experience with California social services programs like Medi-Cal and CalFresh, and experience as a former caseworker working with clients.	7-18 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications		
ST 21	Staffing	The User Interface (UI) Lead is responsible for: a) Working closely with the design, development and test teams in support of Consortium, county, state, advocate and client activities. b) Coordinating with these groups to identify, research and resolve questions, and communicate insights to shape the user experiences. c) Engaging the Consortium, counties, state, advocates and clients in UCD activities throughout the design and development processes and overseeing the design and usability of the application. d) Identifying and proactively bringing forward options that will provide the most efficient and effective engagement of users, and the best value to the Consortium, Counties, and stakeholders.	Y	<b>Deloitte Digital meets this requirement</b> by proposing User Interface (UI) Lead Jared Miniman, who has relevant experience in performing in this capacity and has a clear understanding of the role, complying with this requirement and detailed in our narrative response. His responsibilities are inclusive of those noted in this requirement.	7-25	7.2.4		
ST 22	Staffing	The User Interface Lead shall have a minimum of three (3) years of customer experience, insights and/or strategy in human services systems and/or programs.	Y	<b>Deloitte Digital meets this requirement</b> by proposing User Interface (UI) Lead Jared Miniman, who has a minimum of three years of customer experience, insights and/or strategy in human services systems and/or programs.  <b>Deloitte Digital exceeds this requirement</b> by proposing User Interface (UI) Lead Jared Miniman, who has six years of customer experience, insights and/or strategy in human services systems and/or programs.	7-20 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications		
ST 23	Staffing	The User Interface Lead shall have a minimum of three (3) years of experience gathering consumer and user business data, analyzing of the data, to quantify and inform User Interface/User Experience (UI/UX) strategies.	Y	<b>Deloitte Digital meets this requirement</b> by proposing User Interface (UI) Lead Jared Miniman, who has a minimum of three years of experience gathering consumer and user business data and analyzing the data to quantify and inform User Interface/User Experience (UI/UX) strategies.  <b>Deloitte Digital exceeds this requirement</b> by proposing User Interface (UI) Lead Jared Miniman, who has five years of experience gathering consumer and user business data and analyzing the data to quantify and inform User Interface/User Experience (UI/UX) strategies.	7-20 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications		
ST 24	Staffing	The User Interface Lead shall have a minimum of three (3) years of experience applying UI/UX Design, implementing UI/UX methodologies and best practices, and designing wireframes or prototypes for research validation.	Y	<b>Deloitte Digital meets this requirement</b> by proposing User Interface (UI) Lead Jared Miniman, who has a minimum of three years of experience applying UI/UX Design, implementing UI/UX methodologies and best practices, and designing wireframes or prototypes for research validation.  <b>Deloitte Digital exceeds this requirement</b> by proposing User Interface (UI) Lead Jared Miniman, who has six years of experience applying UI/UX Design, implementing UI/UX methodologies and best practices, and designing wireframes or prototypes for research validation.	7-20 7-39 G-1	7.2.2 7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications		

# REQUIREMENTS CROSS-REFERENCE MATRIX

Attachment J

Staffing			CONTRACTOR Response				For Consortium Use Only	
REQ#	Category	Requirements	Requirement Met (Y/N)	CONTRACTOR Comment	Page #	Section #	REQ Met	Reviewer Comment
ST 25	Staffing	The Contractor's staff shall be dedicated to the Project unless otherwise described within the Contractor's approach and approved by the Executive Director.	Y	<b>Deloitte Digital meets this requirement</b> by providing resource allocation levels in our proposed staffing levels submitted as part of this response.	7-29	7.3.1		
ST 26	Staffing	Contractor's work must be conducted at an approved project site as described in Section 1.5 unless alternate arrangements are approved in writing by the Executive Director.	Y	<b>Deloitte Digital meets this requirement</b> by noting the location of staff as part of our bid response. For staff that will be onsite they will primarily work at the locations noted in RFP Section 1.5. Resources that will be colocated at a remote site will be approved in writing by the Executive Director.	7-29	7.3.1		
ST 27	Staffing	For any expected Staff changes, the Contractor shall provide a 30-calendar day notice to the Executive Director regarding the change and plans for transition and provide the Consortium a resume and three references for any recommended replacement staff. The Consortium reserves the right to require face-to-face or phone interviews of all proposed replacement staff and the right to accept or reject any proposed staff.	Y	<b>Deloitte Digital meets this requirement</b> by outlining the approach for monitoring and addressing staffing changes, complying with this requirement as detailed in our narrative response.	7-38	7.5.3		
ST 28	Staffing	For any unexpected staff changes, the Contractor shall provide the Consortium Executive Director a written notification within three business days of knowledge and staff action. Within seven days of providing such written notice, the Contractor shall provide the Consortium Executive Director with plans for transition.	Y	<b>Deloitte Digital meets this requirement</b> by outlining the approach for monitoring and addressing staffing changes, complying with this requirement as detailed in our narrative response.	7-38	7.5.3		
ST 29	Staffing	The Contractor shall be responsible for identifying and correcting performance issues for its entire Staff. Should the Consortium discover performance problems with any Contractor Staff, the Executive Director will notify the Project Manager as soon as is reasonably possible. If the Executive Director requests removal of any Staff person, the Contractor shall immediately remove such Staff from the project.	Y	<b>Deloitte Digital meets this requirement</b> by outlining the approach for selecting and monitoring project staff including their performance, complying with this requirement as detailed in our narrative response.	7-37	7.5.3		
ST 30	Staffing	The Contractor shall describe the overall staffing approach to the Portal/Mobile App Project team including location of FTEs. The Contractor must include an organization chart displaying the relationships of the team and include the relationships of the team to the CalSAWS Migration Project, Consortium and other Contractors.	Y	<b>Deloitte Digital meets this requirement</b> by detailing in our narrative response: a) The staffing approach and selection criteria b) Interaction between Deloitte Digital and Consortium staff and stakeholders c) Organization chart that will enable a tightly-coupled interaction between Deloitte, CalSAWS Consortium, and other contractors d) Location of FTEs	7-8 7-27 7-29	7.2 7.3 7.3.1		
ST 31	Staffing	Using the Attachment I – Application Support Role Definition, the Contractor must define and describe each proposed non-key role and its minimum qualifications and responsibilities. All proposed Application Support team staff must be assigned as one of the Staff positions defined within this RFP or a proposed Application Support Role defined using the RFP Attachment I – Additional Application Support Role Definition.	Y	<b>Deloitte Digital meets this requirement</b> by providing the completed Attachment I - Additional Application Support Role Definition in the prescribed format.	7-30 7-31 I-1	7.4.1 7.4.2 Attachment I, Additional Application Support Role Definition		
ST 32	Staffing	The Contractor shall describe the criteria used to fill the Key Staff positions and should discuss the planned interaction between these individuals and Consortium's Project Staff in similar roles.	Y	<b>Deloitte Digital meets this requirement</b> by outlining what criteria was used to select key staff and displays the relationship and planned interactions used between these individuals and Consortium's project staff in similar roles.	7-4 7-27	7.1.1 7.3		
ST 33	Staffing	The Contractor shall provide a monthly, deliverable-based staff loading schedule using Attachment A – Price Proposal Schedules. The Staff Loading will be separated from the Price Proposal for the Staffing Approach review. The Contractor shall provide a description of how staffing estimates provided within Attachment A – Price Proposal Schedules were developed and how adjustments will be made to address changes in staffing needs.	Y	<b>Deloitte Digital meets this requirement</b> by providing the deliverable-based staff loading schedule using Attachment A – Price Proposal Schedules. We further describe how our staffing estimates were developed and how adjustments will be made to address changes in staffing needs.	7-32	7.5		
ST 34	Staffing	The Contractor shall provide staff résumés and qualifications for all staff in accordance with the format prescribed in Attachment G – Staff Resumes/Staff Qualifications.	Y	<b>Deloitte Digital meets this requirement</b> by providing staff resumes and qualifications following the prescribed format in the completed Attachment G – Staff Resumes/Staff Qualifications.  <b>Deloitte Digital exceeds this requirement</b> by providing staff whose qualifications are exceeding what has been outlined as the minimum qualifications.	7-39 G-1	7.6.1 Attachment G, Key Staff Resumes/Staff Qualifications		
ST 35	Staffing	The Contractor shall provide two (2) Individual Reference Checks for all Key Staff in accordance with the format prescribed in Attachment H – Individual Reference Check.	Y	<b>Deloitte Digital meets this requirement</b> by providing the completed Attachment H – Individual Reference Check for all key staff.	7-39 H-1	7.6.2 Attachment H, Individual References		