TRANSFORMATION TWENTY-ONE TOTAL TECHNOLOGY NEXT GENERATION (T4NG) PERFORMANCE WORK STATEMENT (PWS) DEPARTMENT OF VETERANS AFFAIRS

Office of Information & Technology
Enterprise Program Management Office (EPMO)

Customer Relationship Management (CRM) Platform Development and Operations and Maintenance (O&M) Support

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1.0 BACKGROUND

The mission of the Department of Veterans Affairs (VA), Office of Information & Technology (OI&T), is to provide benefits and services to Veterans of the United States. In meeting these goals, OI&T strives to provide high quality, effective, and efficient Information Technology (IT) services to those responsible for providing care to the Veterans at the point-of-care as well as throughout all the points of the Veterans' health care in an effective, timely and compassionate manner. VA depends on Information Management/Information Technology (IM/IT) systems to meet mission goals.

OI&T has transitioned each project under the CRM Program from the Project Management Accountability System (PMAS) project management process into the Veteran-focused Integration Process (VIP) project management process. VIP is a Lean-Agile framework that services the interest of Veterans through the efficient streamlining of activities that occur within the enterprise. The VIP Guide link can be found in Section 2.0.

VIP is the follow-on framework from PMAS for the development and management of IT projects which will propel the Department with even more rigor toward Veteran-focused delivery of IT capabilities. The VIP framework unifies and streamlines IT delivery oversight and will deliver IT products more efficiently, securely and predictably. The VIP framework creates an environment delivering more frequent releases through a deeper application of Agile practices. In parallel with a single integrated release process, VIP will increase cross-organizational and business stakeholder engagement, provide greater visibility into projects, increase Agile adoption and institute a predictive delivery cadence.

The Veterans Relationship Management (VRM) Program, now called Enterprise Veterans Operations (EVO), was established in 2010 in order to provide on-demand access to comprehensive VA services and benefits in a consistent, user-centric manner through a multi-channel virtual call center (VCC) processing framework. This framework is aimed to enable clients to find uniform information about VA's benefits and services regardless of access channel used to complete their transactions with VA and to quickly identify Veterans without having to repeat information and will allow seamless access to multiple VA service lines.

Agent assisted interaction has been the focal point of the VRM/EVO Customer Relationship Management (CRM) effort because it is currently the most commonly used channel. The key to achieving the quality of service expected by VA clients when communicating with contact center agents is to modernize contact center capabilities and provide agents with a view of Veteran's data to triage the most common inquiries from a single graphical user interface (GUI) to increase first contact resolution. Similarly,

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important to VA's ability to measure and improve service delivery is the ability to capture information about Veterans' (and Veteran beneficiaries and representatives) interactions with VA across the VA Enterprise.

CRM technology is being leveraged across the Enterprise Program Management Office (EPMO) and going forward will be referred to as either Core or Non-Core CRM. The Core CRM applications fall organizationally under the Enterprise Veterans Operations (EVO) Office, formerly known as the Veterans Relationship Management (VRM) Program, which is aligned under the Veterans Experience Office (VEO) and EPMO. There are three (3) eGain products that are utilized in conjunction with the CRM technology: Chat, Co-Browse, and Knowledge Management Analytics.

The CRM Program currently supports or plans to support the following existing Core and Non-Core applications:

The following applications represent what are considered the current Core-CRM Program applications (additional applications anticipated in the future):

1. VA Telephone Operator (VATO)
2. CRM Enterprise (CRMe)
3. CRM/Unified Desktop (CRM/UD) / CRM/UD-Optimization (CRM/UD-O)
4. VA Medical Center (VAMC) Contact Center Modernization (VCCM) (also known as Fix the Phones (FtP))
5. Chief Business Office, Purchased Care (CBOPC) (formerly known as PC@HAC)
6. Education Call Center (ECC) CRM
7. Vocational Rehabilitation and Employment (VRE)
8. Purchased Care Non-VA/Call Center Way Forward (PCNV/CCWF) (also known as Community Care CRM)
9. Member Services CRM (also known as Health Resource Center (HRC) and Health Eligibility Center (HEC))
10. CRM Veterans Crisis Line (CRM VCL)
11. Chat/Co-Browse/Analytics
12. Knowledge Management (KM)/Analytics

The following applications represent what are considered the current Non-Core CRM Program applications (additional applications anticipated in the future):

1. Telehealth Management Platform (TMP) (also known as Clinical Video Telehealth (CVT)/Telehealth Scheduling System (TSS)
2. Veterans Enterprise Management System (VEMS)
3. Federal Case Management Tool (FCMT)
4. Interagency Coordination Program (ICP)

5. Beneficiary Fiduciary Field System (BFFS)
6. Loan Guaranty (LGY)

The following are descriptions of the CRM Core and Non-Core applications:

1. **VA Telephone Operator (VATO):** A web-based CRM application developed specifically for Telephone Operators in Veterans Health Administration (VHA) Medical Centers as part of the Contact Center Modernization effort. This application allows Telephone Operators to capture interaction history, generate reports and address the following call types: re-direct, no answer, directory, patient room inquiry and other. The VATO CRM application development has been completed and deployed to the Production environment; however, the rollout to end users is pending union negotiations.

2. **Customer Relationship Management Enterprise (CRMe):** This project develops enterprise-level software components and code patterns for reuse in VA CRM implementations. CRMe reduces the amount of functionality that must be developed independently in each CRM instance. CRMe will also provide a User Accessible Tenant capable of identifying the client, providing client data, and storing and sharing Person History information captured from CRM instances and third-party applications. One of the key outputs of the CRMe effort is the Customer Interaction History Service (CIHS), which shares digitally captured interaction points as a Veteran or Beneficiary moves through the VA system to receive benefits, health care and other services. CIHS helps VA understand the ways in which Veterans engage with VA and how the customer has used VA services.

3. **Customer Relationship Management (CRM)/Unified Desktop Optimization (CRM/UD-O):** This application is currently being deployed in Production to the seven Veteran Benefits Administration (VBA) National Call Centers (NCCs) and the Pension Management Center. CRM/UD-O provides Microsoft Dynamics CRM functionality to the Public Contact Representatives (PCRs)/agents, allowing them to quickly and accurately respond to Veterans' inquiries. CRM/UD-O enhancements will allow for expanded access to VA information needed by the VBA agent and external stakeholder community. Therefore, expansion will enable integrated customer service center access by phone, web, mobile and in-person and will further the goal of becoming a Public Contact Service Center for agents who currently service customers through their preferred access channels.

4. **VA Medical Center (VAMC) Contact Center Modernization (VCCM):** This project is the follow-on effort of the Fix the Phones (FtP) CRM project that completed in December 2016. The VCCM end users are located in Reno, NV,

and the project will entail the development of an agent-based application using Microsoft Dynamics CRM aimed at improving the Veteran patient's customer service experience by reducing dropped calls, long wait times, and offering a direct path to contact an employee capable of resolving the inquiry. VCCM will provide call center agents with a single desktop view they can use to view and record relevant information and resolve Veteran calls. It will be deployed to the Patient Aligned Care Team (PACT) Call Center and additional sites in the Veterans Integrated Service Network (VISN) 21.

5. **Chief Business Office, Purchased Care (CBOPC) (formerly known as PC@HAC and currently referred to as "Family CRM (FM CRM)" or "VHA Community Care"):** This project is the follow-on effort of the Purchased Care at the Health Administration Center (PC@HAC) project that completed in 2015. CBOPC provides Microsoft Dynamics CRM functionality to the contact center agents within the CBOPC Customer Service Center (CSC) located in Denver, Colorado in order to better support and resolve inbound calls from providers and Veteran's beneficiaries and achieve first call resolution. The current capabilities include, but not limited to: efficient workflows, streamlined business processes, incorporation of common enterprise services, adopted capabilities from the CRMe platform, improved management reporting and enhanced/simplified administrative capabilities. This effort aims to improve efficiencies with processing beneficiaries/providers requests and claims, provide an integrated view of beneficiaries/Veteran/provider requests, interactions and staff actions, standardize the process of capturing interactions, and improve call center and management reporting capabilities.

6. **Education Call Center (ECC) CRM:** This application is currently being used in Production by the ECC contact center agents located in Muskogee, OK and was developed via a combination of out-of-the-box Microsoft® Dynamics functionality and integration with back-end VA systems. ECC CRM functionality provides a consolidated means of answering, tracking, and reporting calls from Veterans, beneficiaries, and school officials. ECC CRM aims to seamlessly integrate with existing VA systems for Chapter 30-36, 1606/07, and Fry benefit programs to support the business activities of the ECC call agents. It allows call agents to view all information associated with a Veteran/beneficiary and to complete change of address and access direct deposit information. ECC CRM allows the tracking of contact history and facilitates improved first call resolution by streamlining access to disparate data elements into a unified desktop toward lower handle times.

7. **Vocational Rehabilitation and Employment (VRE)**: This project, which will be a national rollout, will develop a Case Management System using Microsoft

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Dynamics CRM capabilities for VRE Counselors and Case Managers to address the identified needs to increase automation, reduce the use and storage of paper, and increase their ability to interface with additional systems. VRE Counselors and Case Managers provide services to help with job training, employment accommodations, resume development, and job seeking skills coaching.

8. **Purchased Care Non-VA/Call Center Way Forward (PCNV/CCWF) (also known as Community Care CRM):** Also known as Community Care CRM, the intent of this project is to provide call center agents and field support staff with a single desktop view that enables them to locate required caller information and populate call records accurately and efficiently for inquiries regarding Non-VA Medical Care health claims. In addition, the call center agent will be able to use the application to route requests to the appropriate groups/team to expedite issue resolution. The application will provide access to all of the Veteran's claims and medical information found in multiple systems across the enterprise.

9. **Member Services CRM (also known as Health Resource Center (HRC) and Health Eligibility Center (HEC)):** This effort is a continuation of two previous CRM development projects: Health Resource Center (HRC) and Health Eligibility Center (HEC). The Member Services CRM application has been deployed in Production to several user groups within the VHA Member Services organization, located in Topeka, KS, Atlanta, GA, Fort Riley, KS and Waco, TX. The original HRC project included the transition from the HRC's legacy Seibel based CRM solution to a Microsoft Dynamics based CRM solution, providing an efficient desktop, workflow, contact history and knowledge management capabilities. This project will provide enhancements to the Member Services CRM application and continue the rollout to additional end users. The goal is to provide Member Services contact center agents with a single desktop view that will enable a 360 degree view of Veteran specific data in the areas of health benefits, first party payment processing, pharmacy support, health care eligibility and enrollment including income verification for VA's health benefits that are tied to financial needs assessments.

10. **CRM Veterans Crisis Line (CRM VCL):** This project provides a modern contact center solution, based on the Microsoft Dynamics CRM product to VCL, a highly critical, enterprise-level program, organizationally aligned with the VHA Office of Mental Health Operations. The VCL provides 24x7x365 crisis intervention services (telephone, chat, and text) to Veterans, their family members and supportive others. The VCL mission is to provide service to both enrolled, non-enrolled Veterans and non-Veteran callers who are in crisis, suicidal, or at risk to harm others; and to reduce the number of suicides by modifying immediate

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stress, offering the caller options, and assisting by referring them to the appropriate resources at the VA or community services nearest their home.

11. **Chat/Co-Browse/Analytics:** This project incorporates features that are designed to improve the effectiveness of VA customer care operations. Chat provides an additional channel for Veterans or others who have business with the VA with another channel to access VA contact centers. Effective use of Chat features is expected to increase efficiency in handling contacts. Metrics analytics tools within the software platform underlying this feature enable effective management of the Chat capability. The Chat pilot is currently deployed to the HRC in Topeka, KS and NCCs within Nashville, TN and Salt Lake City. Co-browse will primarily be used to provide support to the users of VA online portals. The call center agents will be able to see what is on the desktop of the caller when they are trying to help the caller with his/her issue. Agents, if desired, will also be able to take control of the remote desktop in order to help the caller accomplish what he/she is trying to do.

12. **Knowledge Management (KM)/Analytics:** This application serves as a nationwide enterprise VRM Knowledge Management (KM) solution based on customized implementations of a COTS product (eGain KnowledgeAgent) that consolidates the data located in various existing knowledge management databases in order to provide consistent, accurate information to VA customers in an intuitive manner and that also consolidates the existing distinct and redundant VA customer service information identification, collection, and maintenance processes. Metrics analytics tools within the software platform underlying this feature enable effective management of the KM capability

13. **Telehealth Management Platform (TMP) (also known as Clinical Video Telehealth (CVT)/Telehealth Scheduling System (TSS)):** This project is a follow-on effort of the Clinical Video Tele-Conferencing (CVT) and Telehealth Scheduling System (TSS) projects which aim to provide a national scheduling system to support CVT and ensure health care providers, locations, and equipment are coordinated with patients across different Veterans Health Information Systems and Technology Architecture (VistA) scheduling systems while providing workload capture/identification and reservation of resources.

14. **Veterans Enterprise Management System (VEMS):** This project will modernize the Office of Small and Disabled Business Utilization (OSDBU)'s IT infrastructure and increase automation of business processes, eliminate backlogs due to IT failures, improve business processes to decrease time of verification process, improve accuracy of the VIP database, provide VA's senior leaders with performance data, and increase knowledge of all stakeholders.

15. **Federal Case Management Tool (FCMT):** This application provides case management capabilities, based on a separate implementation of the Microsoft Dynamics CRM Product running on the VA CRM Platform, to Federal Recovery Coordinators. FCMT also provides case information to service members, Veterans, beneficiaries, and Veteran's caregivers and enhances the transition from service member to Veteran by aiding the delivery of care and benefits to the Veteran. FCMT automates the case management capabilities of intake, referral and enrollment and the creation and maintenance of the individual case records and treatment plans. FCMT also enables enhanced communication methods between the VA caseworkers and their clients and provides caseworkers insight into services provided by other VA case managers and by eternal entities. FCMT further enables enhanced consultation processes with the Virtual VA's (VVA's) extended network of clients/caregivers and provides caseworkers with the ability to update manage and report on the status of their cases throughout the life-cycle of the case.

16. **Interagency Comprehensive Plan (ICP)**: This case management project will work with the Department of Defense (DoD) to develop an ICP for Service members and Veterans transitioning from DoD to VA care with multiple, complex, severe conditions. Each comprehensive plan will address goals for recovery, rehabilitation, and reintegration and will address both care and benefit needs. The ICP will be housed in a case management system, as a module within the FCMT application, and will facilitate a common operational picture of each Veteran across VA and DoD services. The ICP will promote care planning that is sustained, agile, effective and efficient throughout the recovery process and will ensure that care plan information is available to the warrior, the family and the care recovery team.

17. **Beneficiary Fiduciary Field System (BFFS):** This application replaced an existing labor-intensive system with limited data retention, auditing, and reporting capabilities and inadequate scheduling and follow-up capabilities to manage and provide supervision of VA monetary benefits paid to third party payees on behalf of minors or individuals incapable of managing their financial affairs. BFFS has been deployed to all six US based Fiduciary Hubs (Columbia, SC, Indianapolis, IN, Lincoln, NE, Louisville, KY, Milwaukee, WI, Salt Lake City, UT) and Manila, Philippines.

18. **Loan Guaranty (LGY)**: This project will design and develop a CRM system to optimize the LGY call flows and processes. The goal of the system will be to establish a tiered service model and automate existing processes to distribute calls across all LGY Centers of Excellence and maximize use of available resources.

2.0 APPLICABLE DOCUMENTS

The Contractor shall comply with the following documents, in addition to the documents in Paragraph 2.0 in the T4NG Basic Performance Work Statement (PWS), in the performance of this effort**:**

1. Software Engineering Institute, Software Acquisition Capability Maturity Modeling (SA CMM) Level 2 procedures and processes
2. Federal Information Process Standards (FIPS) Publication 199, Standards for Security Categorization of Federal Information and Information Systems, February 2004.
3. National Archives and Records Administration (NARA), “Basic Laws and Authorities”, February, 2008 Revision, “Basic Laws and Authorities of the National Archives and Records Administration”, 2006 Edition

3.0 SCOPE OF WORK

The Contractor shall provide development services using Microsoft’s Dynamics Customer Relationship Management (CRM) to accomplish the tasks and associated deliverables required in this PWS. This software will be used to support/develop CRM applications across the VA enterprise. The Contractor shall provide project management services; software development, application integration, enterprise service development and enhancement, and operation and maintenance support services for CRM projects as detailed in Sections 5.1 through 5.4. In addition, the Contractor shall provide Phase-In and, if exercised, Phase-Out transition support for the transfer of knowledge and information at the beginning and end of the task order (TO) as detailed in Section 5.5.

3.1 APPLICABILITY

This Task Order (TO) effort PWS is within the scope of paragraphs 4.2 Systems/Software Engineering, 4.2.1 Design and Development, 4.2.2 Architecture Development, 4.2.4 Enterprise Application/Services, 4.2.5 Web Application Design and Development, 4.2.6 Human-Computer Interaction, 4.2.7 System/Software Integration, 4.2.8 Modeling and Simulation, 4.2.10 Engineering and Technical Documentation, 4.3 Software Technology Demonstration and Transition, 4.4 Test & Evaluation (T&E), 4.8.3 Certification and Accreditation, 4.9 Operations and Maintenance (O&M), 4.9.3 Assessment and Authorization, 4.9.4 Security Operating Support, and 4.10 Training of the T4 Basic PWS.

3.2 ORDER TYPE

The effort shall be proposed on a **Firm Fixed Price (FFP)** basis **with a Cost Reimbursement (CR)** Contract Line Item Number (CLIN) for travel.

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4.0 PERFORMANCE DETAILS

4.1 PERFORMANCE PERIOD

The Period of Performance (PoP) shall be a base period of 12 months from date of award, with three 12-month option periods for a total of four (4) years. This task order has eleven (11) optional tasks as provided in the table below.

Period	**Period of Performance**
Base Period (Development/O&M/Planning)*	*12 Months (3 builds per project)
Option Periods 1-3 (O&M)	12 Months
Optional Task 1 (CRM Phase-In Transition Support)	60 days from award
Optional Task 2 (CRM Phase-Out Transition Support)	30 days from award
Optional Task 3 (Additional CRM Development)	May be exercised up to 15 times in the base period and up to 20 times in each option period and shall be coterminous with the period in which it is exercised.
Optional Task 4 (Operational and Maintenance Support Services for Additional “Low” and “High” Level of Effort (LOE) Applications	As defined in the Schedule of Deliverables
Optional Task 5 Operations and Maintenance LOE Upgrade/Downgrade	As defined in Schedule of Deliverables
Optional Task 6 Operational and Maintenance Support Services for Federal Case Management (FCMT)	Up to 36 months
Optional Task 7 Operational and Maintenance Support Services for Interagency Coordination Program (ICP)	Up to 36 months
Optional Task 8 Operational and Maintenance Support Services for Beneficiary Fiduciary Field System (BFFS)	Up to 36 months

Operational Task 9 Operational and Maintenance Support Services for Telehealth Management Platform (TMP) Also known as Clinical Video Telehealth (CVT) Telehealth Scheduling System (TSS)	Up to 36 months
Optional Task 10 Operational and Maintenance Support Services for Veterans Enterprise Management Systems (VEMS)	Up to 36 months
Optional Task 11 Service Desk Support	As defined in the Schedule of Deliverables
Optional Task 12 Minor Functional Augmentation	As defined in the Schedule of Deliverables
Optional Task 13 Warranty Support)	90 days from award

*During the base period, there will be three (3) required builds per project and includes planning activities in accordance with PWS Paragraph 5.3.1.

4.2 PLACE OF PERFORMANCE

Efforts under this TO shall be performed in VA facilities and at the Contractor's facility. The majority of the effort shall take place at the Contractor's facility. It is anticipated that some key Contractor support personnel (supporting project management, strategic design discussions/whiteboarding exercises, senior leadership meetings, and collaboration discussions with technical teams will be located at Washington, DC. Contractors shall be required to travel to other locations as specified in Section 4.3.

Efforts under this TO shall be performed in VA offices located in Washington, DC. Work may be performed at remote locations with prior concurrence from the Contracting Officer's Representative (COR).

Efforts under this TO shall be performed at Contractor facilities. The Contractor shall identify the Contractor's place of performance in their Task Execution Plan submission.

The Contractor shall operate within normal business hours on Eastern Standard Time (6:00 a.m. to 10:00 p.m. EST). The Contractor will be required to support 24/7 operations 365 days per year as identified in Sections 5.4.6, 5.4.7 and, if exercised, 5.14.

Work at a Government site shall not take place on Federal holidays or weekends (but may require off-hour work due to network loading or other disruptions that could occur) unless specifically approved in advance by the Contracting Officer's Representative (COR).

4.3 TRAVEL OR SPECIAL REQUIREMENTS

The Government anticipates travel under this effort to perform the tasks associated with the effort, as well as to attend program-related meetings or conferences throughout the PoP. Travel shall be in accordance with the Federal Travel Regulations (FTR) and requires advanced approval by the COR with VA Program / Project Manager's concurrence. Contractor travel within the local commuting area will not be reimbursed.

4.4 CONTRACT MANAGEMENT

All requirements of Sections 7.0 and 8.0 of the T4NG Basic PWS apply to this effort. This TO shall be addressed in the Contractor's Progress, Status and Management Report as set forth in the T4NG Basic contract.

4.5 GOVERNMENT FURNISHED PROPERTY

The Government shall provide access to VA's approved configuration management tool, which is currently IBM Rational Collaborative Application Lifecycle Management (CALM) Toolset (hereafter referred to as Rational) after contractors complete the six web based training modules as specified in Section 5.1.3 and obtain VA network access. The Rational toolset is used by VA to provide a single Agile product application lifecycle management tool to track project execution details The Contractor shall work with their respective point of contact, to obtain access to TMS to take the mandatory training courses. If the mandated toolset changes throughout the PoP of this TO, then the Government will provide access to the new toolset accordingly.

The Contractor shall be provided access to the following documentation that describes the baseline system to be used, as attachments to the PWS at solicitation:

1. Attachment 1: CRM Platform Vision and Architectural Runway
2. Attachment 2: Epic User Story Lists
3. Attachment 3: Training Artifacts:
   4a.Facilitator's Guide
   4b. User/Participant Guide
   4c. Job Aids
   4d. Exercises
   4e. Mock Calls

The VA COR will provide the following Government Furnished Materials/Information/Equipment upon task order award and as soon as all security and privacy training is complete, background investigations have been initiated in the e-qip system and network access has been granted for performance of this TO:

a) VIP data and documentation
b) Access to VA Project Management Tools and Repositories including:
    i. ProPath
    ii. Rational Tools access after Rational training is completed
    iii. Primavera/Microsoft Project scheduling tools as mandated at the time of the PoP
c) CRM SharePoint site access
d) VA Account and Network Access (Virtual Private Network (VPN), if Government Furnished laptops are provided or Citrix Access Gateway (CAG) access if the Contractor's laptop is to be used to conduct work associated with this TO,
e) VA email account
f) VA PIV card received
g) All CRM relevant program and project documents

The Government has determined that remote access solutions involving Citrix Access Gateway (CAG) have proven to be an unsatisfactory access method to complete the tasks on this specific TO. The Government also understands that GFE is limited to Contractors requiring direct access to the network to: access development environments; install, configure and run TRM-approved software and tools (e.g., Oracle, Fortify, Eclipse, SoapUI, WebLogic, LoadRunner, etc.); upload/download/ manipulate code, run scripts, apply patches, etc.; configure and change system settings; check logs, troubleshoot/debug, and test/QA.

Based on the Government assessment of remote access solutions and the requirements of this TO, the Government estimates that the following GFE will be required by this TO:

1. 25 of standard laptops
2. 75 of developer-grade laptops

The Government will not provide IT accessories including but not limited to Mobile Wi-Fi hotspots/wireless access points, additional or specialized keyboards or mice, laptop bags, extra charging cables, extra PIV readers, peripheral devices, additional RAM, etc. The Contractor is responsible for providing these types of IT accessories in support of the TO as necessary and any VA installation required for these IT accessories shall be coordinated with the COR.

4.6 SECURITY AND PRIVACY

All requirements in Section 6.0 of the T4NG Basic PWS apply to this effort. Specific TO requirements relating to Addendum B, Section B4.0 paragraphs j and k supersede the corresponding T4NG Basic PWS paragraphs, and are as follows,

j. The vendor shall notify VA within 24 hours of the discovery or disclosure of successful exploits of the vulnerability which can compromise the security of the Systems (including the confidentiality or integrity of its data and operations, or the availability of the system). Such issues shall be remediated as quickly as is practical, based upon the severity of the incident.

k. When the Security Fixes involve installing third party patches (such as Microsoft OS patches or Adobe Acrobat), the vendor will provide written notice to VA that the patch has been validated as not affecting the Systems within 10 working days. When the vendor is responsible for operations or maintenance of the Systems, they shall apply the Security Fixes based upon the requirements identified within the TO.

It has been determined that protected health information may be disclosed or accessed and a signed Business Associate Agreement (BAA) shall be required. The Contractor shall adhere to the requirements set forth within the BAA, referenced in Section D of the Request for Task Execution Plan (RTEP) and shall comply with VA Directive 6066.

4.6.1 POSITION/TASK RISK DESIGNATION LEVEL(S)

Position Sensitivity	**Background Investigation** (in accordance with Department of Veterans Affairs 0710 Handbook, "Personnel Suitability and Security Program," Appendix A)
Low / Tier 1	**Tier 1 / National Agency Check with Written Inquiries (NACI)** A Tier 1/NACI is conducted by OPM and covers a 5-year period. It consists of a review of records contained in the OPM Security Investigations Index (SII) and the DOD Defense Central Investigations Index (DCII), Federal Bureau of Investigation (FBI) name check, FBI fingerprint check, and written inquiries to previous employers and references listed on the application for employment. In VA it is used for Non-sensitive or Low Risk positions.

Moderate / Tier 2	**Tier 2 / Moderate Background Investigation (MBI)** A Tier 2/MBI is conducted by OPM and covers a 5-year period. It consists of a review of National Agency Check (NAC) records [OPM Security Investigations Index (SII), DOD Defense Central Investigations Index (DCII), FBI name check, and a FBI fingerprint check], a credit report covering a period of 5 years, written inquiries to previous employers and references listed on the application for employment; an interview with the subject, law enforcement check; and a verification of the educational degree.
High / Tier 4	**Tier 4 / Background Investigation (BI)** A Tier 4/BI is conducted by OPM and covers a 10-year period. It consists of a review of National Agency Check (NAC) records [OPM Security Investigations Index (SII), DOD Defense Central Investigations Index (DCII), FBI name check, and a FBI fingerprint check report], a credit report covering a period of 10 years, written inquiries to previous employers and references listed on the application for employment; an interview with the subject, spouse, neighbors, supervisor, co-workers; court records, law enforcement check, and a verification of the educational degree.

The position sensitivity and the level of background investigation commensurate with the required level of access for the following tasks within the PWS are:

Position Sensitivity and Background Investigation Requirements by Task

Task Number	Tier1 / Low / NACI	Tier 2 / Moderate / MBI	Tier 4 / High / BI
5.1	☐	☐	☒
5.2	☐	☐	☒
5.3	☐	☐	☒
5.4	☐	☐	☒
5.5	☐	☐	☒

The Tasks identified above and the resulting Position Sensitivity and Background Investigation requirements identify, in effect, the Background Investigation requirements for Contractor individuals, based upon the tasks the particular Contractor individual will be working. The submitted Contractor Staff Roster must indicate the required Background Investigation Level for each Contractor individual based upon the tasks the Contractor individual will be working, in accordance with their submitted proposal.

5.0 SPECIFIC TASKS AND DELIVERABLES

The Contractor shall perform the following tasks and provide the specific deliverables described below within the performance period stated in Section 4.1 of this PWS.

Section 5.1 and subordinate subsections that follow, explain the set of standard project management tasks for this task order. Section 5.2 identifies and details common Software Development Lifecycle (SDLC) tasks and associated deliverables that will support the execution of the packages. Section 5.3 identifies the set of functional-requirements associated with each development package. Section 5.4 identifies the set of functional based tasks associated with providing operations and maintenance support. Section 5.5 identifies the set of tasks associated with Phase-In transition support and Phase-Out transition support. Section 5.6 identifies the additional CRM application development. Section 5.7 identifies operational and maintenance support services for additional applications. Section 5.8 identifies operational and maintenance support LOE upgrade/downgrade. Section 5.9 identifies operational and maintenance support for the FCMT application. Section 5.10 identifies operational and maintenance support for the ICP application. Section 5.11 identifies operational and maintenance support for the BFFS application. Section 5.12 identifies operational and maintenance support for the TMP application. Section 5.13 identifies operational and maintenance support for the VEMS application. Section 5.14 identifies operational and maintenance support for service desk support. Section 5.15 identifies minor functional augmentation. Section 5.16 identifies warranty support.

Each integration and development activity shall be performed via a common SDLC process and contribute to the analysis, design, construction, testing, and deployment efforts using VA release management processes and artifacts. The scope of this order shall include the following Work Breakdown Structure activities:

a. Project Management

b. Software Development for CRM projects using Agile SDLC processes

c. Testing and release

d. Operations and Maintenance (O&M) Support

e. Transition Support

The Contractor shall provide development and operations and maintenance support services for existing code, for code developed under this task order and potentially code developed outside of this task order.

All tools used in the maintenance of the CRM application and related applications must be approved in the Technical Reference Manual (TRM). Deviations from this will require a waiver through the Strategic Technology Alignment Team (STAT), formerly known as the Architecture and Engineering Review Board (AERB). Request for exceptions or deviations cannot impact delivery. All tools used in the environments of the CRM and related Programs and all applications produced by CRM and related program projects shall be VA Section 508 compliant as determined by tests performed by the VA Section 508 Office.

Agile project management is evolutionary (iterative & incremental) which regularly produces high quality results in a cost effective, timely, and highly collaborative manner via VIP's value driven lifecycle. This requires open lines of communication among all participants contributing to a project/program/portfolio that include multiple consumers within the contracts and with other VA offices/activities.

VIP describes a schedule of incremental deliveries of useable functionality every three (3) months or less.

Backlog grooming and prioritization are continued throughout the product life cycle and shall be managed throughout the period of performance. Based on the scope of work established in the Backlog, development builds shall be three (3) months or less. The Contractor shall develop and deliver a Build Plan in collaboration with the project team prior to beginning the build. The Build Plan is the scope of work which will be completed in the agreed upon build timeframe. Each build ends with a new release or push to production. The Contractor shall follow the standard development cycle as outlined below in Section 5.2 and all subparagraphs – Plan, Develop, Test, Release, Performance Monitoring and Warranty for all builds.

A build will consist of a series of sprints (typically 1-4 weeks duration). The Contractor shall provide a Sprint Plan prior to the beginning each Sprint which defines the work to be completed during the Sprint. Once the Sprint Plan is approved by the Government, the Government will establish when the sprint is complete.

The foundational structure for VA agile development and project management can be found in the VIP Guide. For delivery of all project artifacts, the Contractor shall utilize Rational for managing project execution details and for the management and storage of artifacts using approved VIP and/or EPMO website templates.

The Contractor shall utilize approved Veteran-focused Integration Process (VIP) and/or ProPath templates. When no VIP or ProPath template exists, the Contractor shall design and develop a template to be utilized for all tasks being developed under this TO that must be reviewed and approved by the VA COR prior for delivery of the associated artifact. The Contractor shall include only the content and artifacts that have been updated or developed in the target increment/build in deliverable packages. When no change to a package component has occurred during an increment/build, unrelated or unchanged artifacts will not be included in the associated delivery packages. The Contractor shall provide a revision history with track changes on to allow for easy visibility of changes between package deliverables. Although not all project artifacts will require an update for each release, the Contractor shall ensure that all necessary artifacts are delivered to the appropriate VA governance committees as mandated by VA-established release processes. If a project artifact doesn't require an update, the Contractor shall provide justification to the VA Project Manager and / or COR for approval.

The Contractor shall deliver documentation in electronic format, unless otherwise directed in Section B of the solicitation/contract. Acceptable electronic media include: Microsoft (MS) Word 2007-2010, MS Excel 2007-2010, MS PowerPoint 2007-2010, MS Project 2007-2010, MS Access 2007-2010, MS Visio 2007-2010, CAD 2002, and Adobe Postscript Data Format (PDF).

5.1 PROJECT MANAGEMENT

5.1.1 CONTRACTOR PROJECT MANAGEMENT PLAN

The Contractor shall deliver a Contractor Project Management Plan (CPMP) that lays out the Contractor's approach, timeline and tools to be used in execution of this TO effort. The CPMP should take the form of both a narrative and graphic format that displays the schedule, milestones, risks and resource support. The CPMP shall also include how the Contractor shall coordinate and execute planned, routine, and ad hoc data collection reporting requests as identified within the PWS. . The Contractor shall update and maintain the VA Program Manager (PM) approved CPMP throughout the PoP.

The CPMP shall describe the technical approach, timelines, organizational resources, and management controls being employed to meet the cost, schedule, and performance requirements as defined in this PWS. The CPMP should take the form of both a narrative and graphic format that displays the schedule, milestones, risks, and resource support. The CPMP shall also include how the Contractor will coordinate and execute planned, routine, and ad hoc data collection reporting requests as identified within the PWS. The CPMP shall describe the resource organization structure as well as the processes to establish, organize, and maintain effective resources to support project activities. The CPMP shall include the following:

1. A Quality Assurance (QA) plan shall serve as the foundation upon which the Master Test Plan (See Section 5.2.4) will be based. The Contractor shall describe the overall approach to QA activities for the project, but shall not include specific testing. This QA Plan shall document how testing will occur, not what will be tested. This plan shall document how the Contractor defines, implements, and assures quality for all project deliverables. System Assurance, including testing of software code, shall be documented in the Master Test Plan.

2. A System Communication Management Plan which shall describe the processes that will be used to ensure timely and appropriate generation, collection, dissemination,

storage, and ultimate disposition of project information (to include processes for the dissemination of information regarding system outages and updates and/or fixes). The processes should provide the links between stakeholders, ideas, and information that will be necessary for project success. The System Communication Management Plan component of the CPMP shall identify processes for ensuring succinct, responsive, and timely messaging during critical events or issues that may be encountered by the project.

Deliverable:

A. Contractor Project Management Plan

5.1.2 REPORTING REQUIREMENTS

5.1.2.1 EPMO MANAGEMENT

The Contractor shall use the VA's Rational Toolset to provide a single Agile product lifecycle management tool to track execution details. The Rational product Data and Artifact Repository will be used to provide a single authoritative product data source and artifact repository. All OI&T project data and artifacts will be required to be managed in Rational on a daily basis. All checked out artifacts shall be checked back in before the end of each business day. Rational synchronizes all changed information immediately for all team members in support of configuration management and to ensure work is being done on the most updated information.

The Contractor shall use VA Rational tools in accordance with the VA Rational Tools Guide to:

1. Input and manage scheduled product sprints and backlog
2. Input and manage epics, user stories, and requirements
3. Input and manage product risks and issues
4. Input and manage product configurations and changes
5. Input and manage product test plans and execution
6. Input and manage product planning and engineering documentation
7. Input and manage linkages between requirements, code, tests and defects to correlate requirements to change orders to configurable items to risks, impediments, and issues to test cases and test results to show full traceability.

The Contractor shall enter all Agile requirements, changes, tests performed and test results in Rational to show evidence of code coverage and test coverage of all the requirements specified. This will allow VA to have high confidence in a fully documented requirement, as evidenced by data in the Rational Team Concert (RTC) tool and/or the Requirements Traceability Matrix (RTM).

5.1.2.2 EPMO STATUS REPORT

The Contractor shall deliver Bi-Weekly (every two weeks) EPMO Status Reports detailing the status of all work efforts. These reports shall provide accurate, timely, and complete project information supporting EPMO reporting Requirements. The Bi-Weekly Status Report shall include the following data elements:

1. Project Name and Contract/TO Name
2. Overview and description of the Contract/TO Name
3. Overall high level assessment of Contract/TO Name progress
4. All work in-progress and completed during the reporting period
5. Identification of any Contract/TO Name related issues uncovered during the reporting period and especially highlight those areas with a high probability of impacting schedule, cost or performance goals and their likely impact on schedule, cost, or performance goals
6. Explanations for any unresolved issues, including possible solutions and any actions required of the Government and/or Contractor to resolve or mitigate any identified issue, including a plan and timeframe for resolution
7. Status on previously identified issues, actions taken to mitigate the situation and/or progress made in rectifying the situation
8. Work planned for the subsequent four reporting periods, when applicable
9. Current Contract/TO Name schedule overlaid on original Contract/TO Name schedule showing any delays or advancement in schedule
10. Current definition of user requirements / function points overlaid over the original function points and the last reported function points to specifically identify changes in the function points to be delivered since the previous report
11. Workforce staffing data showing all Contractor personnel performing on the effort during the current reporting period. After the initial labor baseline is provided, each Bi-Weekly Status Report shall identify any changes in staffing identifying each person who was added to the contract or removed from the contract
12. Original schedule of deliverables and the corresponding deliverables made during the current reporting period

These reports shall not be the only means of communication between the Contractor, COR and the VA Program/Project Manager to advise of performance/schedule issues and to develop strategies for addressing the issues. The Contractor shall continuously monitor performance and report any deviation from the CPMP or previous Bi-Weekly EPMO Status Report to the COR and VA Program/Project Manager during routine, regular communications.

Deliverable:

A. Bi-Weekly EPMO Status Report

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5.1.3 RATIONAL TOOLS TRAINING

The Contractor and Government Project Manager shall determine which team members require access to the Rational Tool Suite. All Contractors that require access shall complete all of the following VA Talent Management System (TMS) training courses within 14 days of the identification of the access need to be able to successfully manage the project and data in the Rational tool suite. The Contractor shall work with their respective point of contact, to obtain access of the TMS to take the mandatory training courses listed below:

1. TMS ID 3878248 - IBM Rational Team Concert - Agile Sprint, Configuration/Change Management Level 1
2. TMS ID 3878249 - IBM Rational Team Concert - Agile Sprint, Configuration /Change Management Level 2
3. TMS ID 3878250 - IBM Rational DOORS Next Generation - Requirements Management Level 1
4. TMS ID 3897036 - IBM Rational DOORS Next Generation - Requirements Management Level 2
5. TMS ID 3897034 - IBM Rational Quality Manager - Quality Management Level 1
6. TMS ID 3897035 - IBM Rational Quality Manager - Quality Management Level 2

Contractors who have completed these VA training courses within the past 24 months, and have furnished training certificates to VA, will not be required to re-take the training courses.

Deliverable:

Rational Training Certificates

5.1.4 PRIVACY & HIPAA TRAINING

The Contractor shall submit TMS Training Certificates of completion for VA Privacy and Information Security Awareness, Rules of Behavior and Health Insurance Portability and Accountability Act (HIPAA) training. The Contractor shall provide signed copies of the Contractor Rules of Behavior in accordance with Section 9, Training, from Appendix C of the VA Handbook 6500.6, “Contract Security”.

The Contractor shall submit status of VA Privacy and Information Security Awareness training for all individuals engaged on the task.

Deliverables:

A. TMS Training Certificates
B. Signed Contractor Rules of Behavior

5.1.5 TECHNICAL KICKOFF MEETING

The Contractor shall hold a technical kickoff meeting within 15 business days after TO award. The Contractor shall present, for review and approval by the Government, the details of the intended approach, work plan, and project schedule for each effort. The Contractor shall specify dates, locations (in-person preferred but can be virtual), agenda (shall be provided to all attendees at least five calendar days prior to the meeting), and meeting minutes (shall be provided to all attendees within three calendar days after the meeting). The Contractor shall invite the Contracting Officer (CO), Contract Specialist (CS), COR, and the VA PgM / PMs.

The Contractor shall deliver the kick-off meeting package 5 (five) days after the kickoff meeting. The package shall include a work planning and delivery approach, milestone schedule, and constraints.

5.1.6 ONBOARDING

The Contractor shall manage the onboarding of their staff. Onboarding includes steps to obtain a VA PIV card, network and email account, complete training, initiate background investigations, and gain physical and logical access. In addition, the Contractor shall identify individuals which may require elevated privileges to the necessary development and test environments for the various systems to be enhanced. After review between the Contractor and VA COR, a decision will be made as to the necessity of obtaining GFE for the onboarding staff. If approved, Contractor shall follow the appropriate steps to obtain the equipment.

A single Contractor Onboarding POC shall be designated by the Contractor that tracks the onboarding status of all Contractor personnel. The Contractor Onboarding POC shall be responsible for accurate and timely submission of all required VA onboarding paperwork to the VA COR. The Contractor shall be responsible for tracking the status of all their staff's onboarding activities to include the names of all personnel engaged on the task, their initial training date for VA Privacy and Information Security training, and their next required training date. The Contractor Onboarding POC shall also report the status at the staff level during onboarding status meetings. The Contractor shall provide an Onboarding Status Report weekly for any staff with outstanding onboarding requests for review by the COR, VA PgM and Project Manager.

Deliverable:

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A. Weekly Onboarding Status Report

5.1.7 SCHEDULE MANAGEMENT

The Contractor shall create, maintain, analyze, and report integrated schedules. The schedules shall have a minimum of five Work Breakdown Structure levels for their activities. A schedule shall be developed / reviewed / revised for each build and sprint. The Contractor shall provide schedule updates in Rational on a weekly basis. The Contractor shall also provide an updated Project Schedule (in PDF and MS Project format) as input to the VA- maintained Program Integrated Master Schedule (IMS), at a minimum once a week.

Deliverable:

A. Updated Project Schedule

5.1.8 RISK MANAGEMENT

The Contractor shall conduct risk management of all work performed under this TO and provide input to the product Risk Management registry within Rational maintained by VA.

The Contractor shall:

1. Report, monitor, manage and mitigate risks for each respective product
2. Enter and update risks in the VA approved Risk Repository.
3. Assess the status of its risks on a weekly basis and provide them to VA for inclusion in the larger Risk Management Registry. When new risks occur which could impact development, testing and deployment schedule, the Contractor shall notify the COR and VA PM via email within 24 hours. Email subject line shall read “{Project Name} Risk Alert Notification”
4. Provide the COR and VA PgM / PMs a weekly risk report

Deliverable:

A. Weekly Risk Management Status Report

5.1.9 CONFIGURATION MANAGEMENT

The Contractor shall:

1. Identify the standard and unique aspects of configuration management to be performed for each project by establishing a Configuration Management (CM) Plan which meets EPMO CM plan requirements. The Contractor shall reflect all CM required activities and standards in each project-level CM plan while

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determining the unique aspects of the project which require individualized procedures.

2. Deliver a list of configuration items to be placed under configuration and change control, which shall be documented in the Configuration Management Plan. The Contractor shall identify types of configuration items pertaining to each product to be placed under configuration management. Based on EPMO requirements, and the unique needs or nature of each project, the Contractor shall determine the components within each project that must be under configuration control.
3. Use Rational Team Concert as the VA approved tool and repository for all software source code and electronic artifact configuration and version management. The Contractor shall use the IBM Rational Team Concert tool to manage change, activity, issue, action, risk, and other project data as prescribed by VA standards and processes.
4. Ensure all project software and non-software artifacts are versioned correctly and follow a build/release promotion versioning approach which identifies all major, minor, and updated changes to the components.
5. Project and Product Artifacts must be baselined and versioned in the Rational CM repository in order to allow the tool to show active and past histories of the check-ins and check-outs of all software components, data, and software product engineering documents. Maintain all baselines of software, software builds, and electronic artifacts in the repository, labeling updates and versions according to published CM procedures.
6. Develop, verify and submit with all project build deliveries, a Version Description Document that conforms to EPMO Website standard templates and addresses the manifest of the contents of all software builds created for project releases outside the development environment.
7. Establish and maintain status reporting on change and configuration management activity, and ensure Rational Team Concert data records and artifacts are filed and updated daily.

Deliverables:

A. Configuration Management Plan
B. Version Description Document

5.2 SOFTWARE DEVELOPMENT LIFECYCLE

The Contractor shall provide scrum teams to follow the agile methodology as described below and in the VA Veteran-Focused Integration Process (VIP) guidelines. Scrum teams for this effort shall be composed of an evolving mix of technical skill sets as required to meet the necessary stage of the software development lifecycle and technical nature of the project. The Contractor shall adjust deliverables and Rational updates to match the nature of the software product under development.

5.2.1 AGILE REQUIREMENTS ELABORATION

The Contractor shall complete an initial backlog grooming session with the VA team to properly understand and elaborate business Agile requirements. These sessions shall include participants from the business customer, OI&T and system Subject Matter Experts (SME). The Contactor shall provide an agenda and minutes for each requirements gathering session to the VA project manager as well as the participants. The outcome of this session shall be a complete review of, and agreement to, the initial user stories, including user stories added as a result of backlog grooming by decomposing epics into stakeholder needs, business requirements, business rules, requirements visualizations and user story elaborations. Product backlog grooming and prioritization are continued throughout the product life cycle and shall be facilitated by the Contractor.

The Contractor shall:

1. Ensure all products in the development pipeline are included and executed as appropriate within the overall agile backlog grooming effort.
2. Populate the backlog during an initial planning session identifying all features the team considers relevant to building the product. The backlog serves as the primary source for all program requirements and user stories, and the team shall prioritize the contents.
3. Identify and document possible pain points, functionality/platform gaps and opportunities for system enhancements for inclusion in the backlog.
4. Facilitate any stakeholder briefings, meetings and/or elicitation sessions.
5. Execute requirements reviews with stakeholders and record results of reviews using Rational, updating requirements data as a result of the reviews.
6. Complete a Requirements Package that includes all Epics, stakeholder needs, visualizations, stories, and other sources of requirements information for functional and non-functional requirements. The Requirements Package shall also include mock-ups, visual aids, and dynamic wireframes as required to demonstrate the navigation, taxonomy, menus and dependencies between features in the user interface (UI) and all aspects of the presentation layer that interact with the user.
7. Input and maintain all requirements data in Rational. Ensure all requirements data is under change control and is fully linked to work items that show traceability to design changes, configurable items, test cases and test results.
8. Analyze the CRM Platform Vision and Architectural Runway.

Deliverable:

A. Requirements Package

5.2.2 BUILD AND DEVELOPMENT

The Contractor shall continuously support the iterative build and development methodology in order to complete all epics and user stories identified in the backlog.

5.2.2.1 SOLUTION ARCHITECTURE PLANNING AND EXECUTION

The Contractor shall create a Solution Architecture Package that includes the initial business, systems, application, and data architectures for the new features and capabilities using an architecture framework, approved by the PM/COR. These documents shall be updated utilizing ProPath templates, and Rational when appropriate, and approved by the VA COR/VA PM in each subsequent Sprint. Each subsequent update shall include a Change Page, which specifies the updates made to the document for review and approval by the VA COR/VA PM. The Contractor shall also outline any initial gaps, questions or challenges that may hinder progress in future Builds or Sprints.

The Contractor shall:

1. Support the setup of all needed development and test environments to complete required build development and testing. Coordinate with VA to ensure alignment with all development and test environments. The Contractor shall work with VA to ensure required specifications are provided no later than 30 days prior to environment need date.
2. Support the VA Authority to Operate (ATO) to obtain/maintain approval, as required. Required ATOs must be obtained prior to build release and ATO approval timelines, including time to complete all necessary security scanning and remediation. The project ATO process must be considered in build planning activities and included in the project schedule.
3. Develop and deliver automated build and automated publishing capabilities to schedule jobs and support continuous integration for every sprint. Automated build tools shall be in compliance with the approved list from the One-VA TRM. Code shall be demonstrable and stable enough to be promoted to another environment without issue by evidence of the status of tests and results found in the Rational Tools.
4. Develop a prioritized backlog of architectural/platform requirements as part of the CRM Platform Vision and Architectural Runway.
5. Create and maintain enterprise architecture and designs as part of the CRM Platform Vision and Architectural Runway in an iterative manner over the course of sprints and release.
6. Leverage and reuse the CRM architecture framework and platform information in the development of the architecture. Design CRM software components and code patterns which foster reusability and enterprise capabilities.

Deliverable:

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A. Solution Architecture Package

5.2.2.2 INTEGRATION AND PARTNER MANAGEMENT

CRM collaborates and integrates with a variety of systems and stakeholders and requires coordination and management of these partner engagements. The Contractor shall support partner management, coordination and integration. The CRM applications are highly integrated systems and each data exchange is treated separately, point to point. The Contractor shall:

1. Develop a Partner Integration Strategy on how CRM applications can integrate with and consume services provided by partners, as well as share data with other VA applications per backlog requirements as part of the Partner Integration Plan. The Partner Integration Plan shall include an overview of the systems, a description of the major tasks involved in the integration of system components, the roles and responsibilities of integrating teams and organization, integration resources and the integration strategy that is to be supported.
2. Coordinate integration and releasing activities to include dependencies with partner services, scheduling, and trigger dates.
3. Collaborate with project partners, which may include other vendors, to establish the priority, scope, bounds, and resources and manage and mitigate project risks and issues regarding trigger dates and dependencies, blockers and proper escalation mechanisms.
4. Coordinate and collaborate with integration partners on the development and execution of integration testing of all interfaces which shall occur in a partner integration environment that is configured by the Contractor and hosted by the CRM Cloud provider.
5. Manage and coordinate touch points with critical partners to ensure early communication of partner integration needs, schedule alignment, status on partner dependent development, to ensure partner alignment with all CRM project schedules and critical partner integration points.
6. Manage partner outage awareness and communication by ensuring partners are aware of schedule alignment, trigger dates, due dates. Communication of partner outages and the impacts to CRM systems up time and user satisfaction, perform resolution, corrective and preventive actions as necessary and notify stakeholders of actions completed and impact to systems.
7. Manage data across environments including staging of data and data used for both scenario testing, validation and demonstrations.
8. Communicate monthly- partner integration activities and partner list with current contact information in the Partner Coordination and Communication Plan. Partner information shall be updated on an as needed basis.

9. Develop documentation and support processes in adherence with VA standards and stakeholder requirements to complete partner integration including change requests, service requests, and web services change requests and National Service Desk (NSD) incidents.
10. Support integration with partners, maintain integration guidelines, support System Oriented Architecture (SOA) and produce and consume services to support integration.
11. Verify the project development schedule to partners and ensure that all schedules are aligned to account for system downtime and code promotion by managing and supporting partner integration dates, service dependencies, notification of issues and alarms and escalation and root cause analysis of service disruptions in all environments.
12. Support demonstrations and coordinate environment setup for demonstrations and functionalities at the end of sprints.
13. Support activities related to the VA Release Readiness Review (RRR) process including partner and stakeholder communication, partner deployment alignment, partner readiness.
14. Maintain integration and provide subject matter expertise to ensure interfaces work with VA Self Service Portals and CRM Chat/Co-Browse and KM software through VA Trusted Internet Connection (TIC), Virtual Private Network (VPN) or Citrix Access Gateway (CAG).
15. Support the CRM cloud server providers' maintenance of the existing connection between VA Self Service Portals and CRM hosting cloud by serving as a subject matter expert on troubleshooting calls and analyzing application logs when required.

Deliverable:

A. Partner Integration Plan
B. Partner Coordination and Communication Plan

5.2.2.3 BUILD PLANNING

Backlog grooming and prioritization are continued throughout the product life cycle and shall be managed throughout the period of performance. Development builds shall be built in three (3) months cycles or less. The Contractor shall develop and deliver a Build Plan in collaboration with the project team prior to beginning the build. The Build Plan is the scope of work which will be completed in the agreed upon build timeframe. Each build may end with a new release or push to production. Each build shall be delivered no longer than 3 months in duration and will be made up of the individual sprints conducted during the build. Each build will be fully tested by end users and will end in a new release candidate. The Build Plan must be completed prior to the start of the 3 month build timeframe. After the build plan is approved and the team is ready to start the build, the 3 month or less build cycle will start. Planning for future builds will occur during the execution of current builds.

The Contractor shall maintain the product backlog, continuously, for each build, in every release and throughout the life of the PoP within Rational Team Concert. All activity scheduled in each build and backlogs will be captured and have status showing all work items, changes, impediments, and retrospectives. All data and artifacts in Team Concert shall be fully linked to requirements data and test data.

The Contractor shall:

1. Schedule and facilitate backlog review, elaboration, and prioritization sessions with the VA PM, VA Product Owner and project team. This backlog grooming will occur continuously throughout the build to ensure the highest product priorities are being met. Meeting agendas, materials and minutes should be distributed per the VA PM's discretion. During these backlog grooming sessions, the Contractor shall also:
    a. Facilitate discussion and coordinate approval decisions of application defects, change requests, and elicit clarification of technical requirements, including assignment of priorities to defects and changes.
    b. Update Rational based on the outcome of the change and configuration management processes. This includes revision of the functional and technical requirements and user stories in Rational Team Concert which shall be mapped to the existing requirements affected, creation of a ranked Product Backlog Report sorted by the priority agreed by the project team, and recording and managing new defects in Rational Team Concert.
2. Facilitate selection of prioritized items from the product backlog to be included in the next build with direct input by the line of business and with approval by the VA PM. The approved items will be incorporated into a Build Plan for posting to Rational Team Concert.
3. Conduct an Initial Design Review with stakeholders to ensure the design is technically feasible to be completed during the build.
4. Provide support for identification of field sites, test environments, acceptance criteria, and ATO requirements.
5. Coordinate and validate Interconnection Security Agreement/Memorandum of Understanding (ISA/MOU) and Service Level Agreements (SLA) for partner dependencies that specifically highlight the commitment of partners to associated releases. The ISA specifies the technical and security requirement of the interconnection and the MOU defines the responsibilities of the participating organizations.

The Contractor shall provide a Build Test Plan to the VA PM for approval prior to initiating any development activities. This plan shall include both Contractor and VA testing activities, dependencies, and descriptions of the interfaces and interactions between solution components that are needed to test and validate. The Build Test Plan shall specify the types and scope of testing to be conducted during each product build (e.g. unit, functional, accessibility, system, reliability, usability, interoperability, regression, security, performance). The Contractor shall include testing related to non-functional requirements, (e.g. load, performance, installation, back-out, and rollback) in the Build Test Plan. The Contractor shall populate its Test Strategy section of the Test Plan in VA's Rational Quality Manager tool within 15 days of the completion of the Build Plan.

At the conclusion of the Build Planning phase, the Contractor shall provide a Build Release Planning Package outlining the prioritized capabilities, estimation of size and timeline for completion.

Deliverable:

A. Build Plan
B. ISA/MOUs and SLAs
C. Build Test Plan
D. Build Release Planning Package

5.2.2.4 SPRINT PLANNING

The Contractor shall initiate Sprint Planning at the beginning of each sprint included in the build. All data and artifacts in Rational Team Concert shall be fully linked to requirements data and test data. The Contractor shall:

1. In collaboration with the Business/Product Owner, take the approved prioritized, items identified from build planning and create and prioritize the sprint backlog.
2. Identify user stories and tasks to be completed within the sprint, the agreement of acceptance criteria for the sprint, and readiness to begin sprint.
3. Conduct a sprint design to understand what problem needs to be solved for each user story, understand critical business functions, test initial concepts, and look for objective feedback. Methods of design could include mock-ups, storyboards, and rapid prototyping.
4. Update Rational to include any additional requirement elaboration details developed during this process.
5. In collaboration with key VA Stakeholders, determine the testing events required for the Sprint.
6. Update requirements traceability in Rational to demonstrate the linkage between what is in each sprint and the requirements.

7. Create the Sprint Plan at the conclusion of the Sprint Planning. The Sprint Plan will be tailored to the scope of the sprint and will include sprint backlog, sprint design, sprint schedule, sprint acceptance criteria and sprint test events. The Sprint Plan shall be approved by the VA PM prior to the start of sprint execution.

Deliverables:

A. Sprint Plan

5.2.2.5 SPRINT EXECUTION

The Contractor shall:

1. Provide a certified Scrum Master to facilitate all ceremonies, ensure Rational is updated daily, enforce scrum framework, track and assist with removing impediments.
2. Conduct sprint development including disciplined testing (unit, functional, regression) and reviews as a continuous process, to avoid finding issues at the end of sprint development. Develop the features and capabilities as work items in Rational Team Concert that were established in the Sprint Plan.
3. Initiate and conduct daily scrums (typically 15 minutes) to discuss the team's progress, impediments and daily plans.
4. Attend Scrum of Scrums, which are half hour meetings, approximately three times per week, to discuss progress, impediments and cross-project dependencies with other projects.
5. Provide Daily Rational Updates, to include progress on tasks during sprints, blockers and dependencies.
6. Coordinate and support demonstration of the sprint activities and review/demonstrate acceptance criteria with the project team and key VA stakeholders at the end of each sprint.
7. Obtain official Customer Acceptance of the Sprint.
8. Initiate and facilitate a Sprint Retrospective at the end of the Sprint to capture team performance and lessons learned. Identify any planned sprint items not completed during the sprint, issues encountered and plans for resolution.

The Contractor shall document all activity executed during each sprint and update the backlog in Rational. This shall include all project artifacts such as work items, changes, risks, issues, impediments, and retrospectives. All data and artifacts in Rational Team Concert shall be fully linked to requirements data and test data. All project artifacts and source code will be under change and configuration management as outlined in the Configuration Management Plan

The Contractor shall deliver, at a minimum, the following Agile reports to show progress of development:

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1. Sprint Burn Down chart for each project/product being modified at the conclusion of each Sprint that illustrates the cumulative planned estimated metrics versus the cumulative actual completed metrics.
2. The Velocity Chart showing the amount of value delivered in each sprint.

Deliverable:

A. Sprint Burn Down and Velocity Charts

5.2.2.6 TESTING

The Contractor shall conduct sprint and build testing as follows:

Sprint Testing

The Contractor shall adopt Agile best practices for integration testing into each Agile development sprint and build. The Contractor shall conduct these tests as applicable throughout the development lifecycle using industry best practices of continuous integration methods and automated regression testing utilities approved in the One-VA Technical Reference Model (TRM).

The Contractor shall provide a Test Plan (identified in 5.2.2.3, Build Test Plan) in the Rational Quality Manager following the templates and data requirements for each test appropriate to each phase of development. The Contractor shall provide Test Results in the Rational Quality Manager which is the final piece of data that completes the Requirements Traceability Matrix (RTM). VA PM acceptance will occur through the Rational Quality Manager approval process.

The Contractor shall support security, accessibility, performance, technical standards, architectural compliance, user acceptance and initial operational capability tests, audits, and reviews. Security scanning is done by multiple methods and is done multiple times throughout the course of a project with methods such as infiltration testing (WASA), code analysis tools (Fortify), etc. Accessibility reviews are performed through a variety of tool based and manual reviews, able to scan web applications and other technologies used for user interfaces. Performance testing is done through load testing and technical analysis of capacity planning data submitted by the project team. Architectural compliance assessments are done through submission of design materials to confirm compliance within the enterprise architecture.

The Contractor shall ensure all test and compliance review planning and execution details are included in the Test Plan. The testing and compliance results must be entered and maintained in Rational Quality Manager and under version control in Rational Team Concert. The Contractor shall ensure that results of all assessments of the project performed by the Contractor or by VA offices are consolidated into Rational for planning and status reporting.

When a defect is identified during testing, the Contractor shall log it in Rational, selecting the appropriate severity level. The Contractor shall provide sufficient information to recreate the defect for purposes of analysis and remediation. The Contractor shall prioritize the defect in the sprint backlog which shall be reviewed by the development team and approved by the VA PM. Based on the priority, the defect could be entered into the current sprint or entered into the backlog.

The Contractor shall ensure Rational data is updated on a daily basis so VA stakeholders can access accurate and timely status.

Build Assembly and Testing

The Contractor shall assemble completed sprints into builds and test the overall build. The Contractor shall:

1. Support test environment setup including setup, configuration, and data loading of the necessary development and test environments. The specific number of test environments that may be required shall depend upon the nature of the build.
2. Support test events as required for each build including:
    a. Product component testing
    b. Component integration and system testing
    c. Quality assurance testing
    d. User functionality testing

The Contractor shall test during the Build phase and ensure the new sprint functionality work together in the event the build is determined to be a release candidate. The Contractor shall support all build testing events as required by the PM to explain functionality that was developed during the build, track defects found during build testing, and work with the PM to develop a plan to resolve defects discovered during build testing.

The Contractor shall complete the Section 508 Self-Certification Document. The Contractor shall support the VA Project Manager in obtaining the 508 compliance testing certifications for each enhancement that requires any change to user interfaces. Specific documents and information to be used to implement policies from the Section 508 Rehabilitation Act of 1973 and VA's Section 508 Accessibility Mandate can be found at http://www.section508.va.gov/.

The Contractor shall coordinate and conduct Test Readiness Reviews (TRRs) prior and Product Readiness Reviews (PRRs) with product demonstrations throughout the build, as defined by the VA Project Manager. The Contractor shall document and deliver to the VA PM the TRR and PRR review meeting results.

Following successful build testing, the Contractor shall make final, formal delivery of Final Development Code Files, Compiled Code, and supporting documentation. The Contractor shall provide a Build Acceptance Form to the VA PM for signature.

The goal at the end of each build is to have a software package approved and production ready. However, every build may not be released into production. Multiple builds may be combined for release to production with the VA Business/Product Owner, VA project manager and COR approval.

Deliverables:

A. Test Results
B. Section 508 Self-Certification Document
C. TRR/PRR review meeting results
D. Final Development Code Files, Compiled Code and supporting documentation
E. Build Acceptance Form

5.2.2.7 ESCCB AND NSOC

All VA applications hosted in external environments requiring a connection to the VA network enter the VA intranet via a Business Partner Extranet (BPE). The VA BPE is a physically dedicated connection from the VA system to the external location that is exclusively for use by VA. The Contractor shall document, justify, and submit BPE configuration change requests to the Enterprise Security Change Control Board (ESCCB) for approval. The ESCCB Technical Review process is intended to ensure that all proposed changes receive approval from all functional areas (Asset Management, Change Management, Enterprise Network Defense, Enterprise Operation, Service Design and Implementation) within VA-NSOC. Upon Approval of ESCCB Request by the VA, a VA Network Security Operations Center (NSOC) NSD Help Desk Ticket will be opened to document the implementations actions associated with the approved request. All ESCCB requests prepared and submitted by the Contractor shall be included in the project schedule with sufficient time built into the schedule for the technical review, security review, approval, implementation, and testing process to complete (These requests average 2-3 per month).

The Contractor shall:

1. Submit ESCCB requests during the requirements phase only when a project is required to interface with various backend systems that require changes to VA BPE.
2. Provide an approved Platform level Interconnection Security Agreements (ISA) and supporting Memorandum of Understanding (MOU) for each new VA backend system, completed in accordance with VA Handbook 6500, Appendix D, Minimum Security Controls for VA Information Systems.
3. Provide technical support to include verification testing, addressing any unanticipated issues encountered during implementation, and report the status during the required approved maintenance window between 1:00AM to 4:00AM Eastern Standard Time (EST)for any follow-up actions that result from the review process.
4. Complete the Web Application Security Assessment (WASA) checklist when VA applications hosted in an external environment require their application to be publically accessible on the Internet or if required by the Assessment & Authorization (A&A)/Authority to Operate (ATO) process. When this is the case, either a Privacy Threshold Analysis (PTA) or Privacy Impact Assessment (PIA) and WASA report will need to be attached to the ESCCB request. In addition, the WASA checklist includes a passing secure code review validation (e.g., Fortify scan result file) performed by the VA Information Security (OIS) Software Assurance (SwA) Program. Finally, the WASA report also must address all Critical, High and Medium findings before the ESCCB request will be approved and implemented.
5. Assist VA NSOC in any inquiry during the technical review within the ESCCB process.

Deliverables:

A. Platform Level Interconnection Security Agreements (ISA) and supporting Memorandum of Understanding (MOU)
B. Privacy Threshold Analysis (PTA)/Privacy Impact Assessment (PIA)
C. Web Application Security Assessment (WASA) Report

5.2.6 SOLUTION TRAINING

The Contractor shall provide training of VA staff in the utilization and O&M of CRM solution applications, components and services completion for each production development cycle for the duration of this TO. Training documents shall be provided for each release.

The Contractor shall:

1. Provide a Help Desk Training Package for use by VA Help Desk personnel which consists of a system overview presentation, knowledge-based articles, and help desk troubleshooting procedures and instructions.
2. Perform hands-on training with VA Help Desk personnel (not to exceed a total of 15 users) prior to the delivery of the CRM solution for production. Provide minutes of training sessions to include a list of attendees, and time attended.
3. Perform hands-on training with System Administrators/Operations staff (not to exceed a total of 15 users) prior to the delivery of the CRM solution for production. Provide minutes of training session to include a list of attendees and time attended.
4. Provide an End-User Training Package for use by end-users, (i.e., train-the-trainer), to include VA National Help Desk personnel, which consists of a End-User Training plan, Facilitator's Guide, Users Guide, PowerPoint slides, job aids and exercises.
5. Perform on-site, hands-on training with designated application end-users (i.e., train-the-trainer), to include VA National Help Desk personnel, (not to exceed a total of 25 users) prior to pilot and national deployment roll-out of the CRM solution for production. Provide minutes of training session to include a list of attendees and time attended.
6. Create and maintain a Developer's Guide.
7. Create and maintain On-line Help artifacts and scripts in a government hosted repository for Help Desk staff, ITC staff, and end-users.
8. Support VIP Formal Product Documentation Reviews.

Deliverables:

A. Help Desk Training Package and minutes
B. End-User Training Package and minutes
C. Developer's Guide
D. Online Help Artifacts

5.2.3 RELEASE AND DEPLOYMENT

5.2.3.1 PRE-RELEASE SUPPORT

The VIP Release Process is conducted during the build and development cycle by one or more assigned Release Agents, who perform frequent, regular reviews of required and appropriately linked product data in the mandated repositories. The Release Agents also provide timely feedback to the product team concerning the status of the product data and the status of the team's compliance with the VIP Release Process. The Contractor shall support OI&T's single VIP Release process.

The POLARIS calendaring process and tool will be used to track software installations, hardware replacements, system upgrades, patch release and implementation, special works in progress, and other deployments in any VA production environment. The Contractor shall provide data for populating and updating the POLARIS calendaring process for each release and deployment.

The Contractor shall work with the PM and stakeholders to develop a Build Release Package that will outline processes and documentation needed to deploy the build.

To complete the Build Release Package, the Contractor shall:

1. Develop/update/finalize the Platform level Production Operations Manual (POM) and/or the Technical Manual, depending on the product being produced. The POM or Technical Manual shall include regular maintenance and operations information, Responsibility, Accountability, Consulted, and Informed (RACI) information, process flowcharts, dataflow diagrams, key monitoring indicators, and troubleshooting information.
2. Develop the User Guide, which addresses procedural information for the business users on daily operational use of the software.
3. The Contractor shall hold test site calls with VA staff to include Release Coordinators and VIP Release Agents once the product is approved for IOC production testing.
4. Develop and maintain the Version Description Document (VDD) which is used to identify, maintain, enhance, and recreate the product (IT asset) throughout its lifecycle.
5. Create a Transition Plan to include a transition meeting to present a coherent methodology for transferring responsibility for system sustainment to the desired sustaining organization. The Contractor shall describe the system components, architecture, interfaces, and environments and then clearly articulate what elements are to be transitioned to the sustaining organization.
6. Develop a Deployment and Installation Guide to include back-out and rollback procedures, a listing of any changes to Security Keys that impact an end user’s ability to access and perform a system function, Technical Manual, System Security Guide, System Contingency Plans, and Disaster Recovery Plan in accordance with VIP, ProPath and Release requirements.
7. Provide all documentation required to obtain/maintain an Authority to Operate (ATO) as specified in the EPMO Website.

Deliverables:

A. Build Release Package

5.2.3.2 INITIAL OPERATING CAPABILITY (IOC) SUPPORT

An Initial Operating Capability (IOC) Evaluation is a limited production release that is required for all system solutions that will be released to multiple locations, such as a VistA release. The Contractor shall correspond with the project's VA Release Agent to confirm whether the IOC approval process is required. The evaluation occurs after all testing has been completed and user acceptance has been granted. If deemed necessary by the VA Release Agent, the Contractor shall observe and support IOC by assisting with the tracking and investigation of issues and remediation of defects as needed.

The Contractor shall support a ten (10) day error free IOC in the production account. The Contractor shall resolve and track all defects and document the findings in the Defect/Fix Status Report, as well as address all issues and questions identified during IOC. For each defect identified, the Contractor shall log the defect, identify a resolution for the defect, and provide a Defect Resolution Plan, including timeline and impacts to the schedule, software code and documentation. Following VA PM approval of the plan, the Contractor shall execute the approved plan. At the completion of each defect correction, the Contractor shall updates the software source code and compiled code coordinate the installation of the software update into the test site production accounts, and deliver updated supporting documentation as identified in the below paragraph.

After any defect correction during IOC, IOC shall continue with the updated software source code for a minimum of five (5)-business days error free before exiting IOC.

The Contractor shall support IOC evaluation activities (if confirmed by the VA Release Agent that they are indeed required) to ensure IOC entry and exit criteria are met and deliver an IOC Entry and Exit Summary. The Contractor shall support installation and configuration at VA test sites, and support identification and development of remediation plans for defects as required.

Deliverable:

A. Defect/Fix Status Report
B. Defect Resolution Plan
C. Updates to Software Source Code, Compiled Code and Supporting Documentation
D. IOC Entry Request and Exit summary

5.2.3.3 RELEASE AND DEPLOYMENT SUPPORT

In accordance with the VIP Guide, release and deployment support begins upon successful completion of Production Deployment for the first release.

Following successful completion of the IOC, the Contractor shall update and finalize a Technical Documentation Package including software code, materials, manuals, user guides, and release notes and make final, formal delivery to VA. If any discrepancies are found, the Contractor shall be responsible for resolution.

Successful completion of deployment requires that the solution or application has received the required approvals and authorizations. The Contractor shall adhere to all applicable policies and procedures to enhance the CRM applications and ensure that the architecture is in accordance with VA's architecture guidelines.

The Contractor shall provide subject matter expertise to support and coordinate each release with the VA technical staff and the development and integration teams of the systems that are interfaced, and resolve issues and ensure that migration is completed as planned to the proper technical environments.

The Contractor shall:
1. Support all CRM System enhancement deployments.
2. Work in conjunction with VA to provide deployment support for each of the scheduled releases.
3. Participate in coordination activities to review deployment requirements and verify the sufficiency of deployment plans and checklists.

In conjunction with the PM and stakeholders, the Contractor shall produce a Release and Deployment Support Plan to outline the implementation, deployment, training and transition of the application to the maintenance team. The Contractor shall include release instructions, design documents, and maintenance instructions for the solution. Instructions shall include all specific steps for installation of the software and also a "Rollback" procedure that can be used in the event of a problem. The Release and Deployment Support Plan shall outline how the Contractor will accomplish this task.

The Release and Deployment Support Package shall include updated and final technical documentation reflecting any changes occurring during IOC:
1. Solution Deployment Packages (SDP) with smart scripting to VA in support of project deployment efforts. The SDP shall include all applicable required Artifacts covering the Release Management, Product Documentation, and Product Support phases.
2. Updated Platform level Production Operations Manual and the Deployment, Installation, Rollback, Back-out Guide for quick diagnosis of operational problems. The Contractor shall also develop a Deployment Guide with instructions on how to deploy each component, inclusive of component relationship diagrams.
3. Updated Technical Documentation Package

4. Technical Manual within the Release Package that will document the technical design, interactions with other systems, and configuration in the VA Software Library to address changes resulting from an enhancement.
5. Updated Business Release Notes within the Release Package that describe changes to existing software and new features and functions created as a result of this enhancement.
6. Close coordination with the VA Release Agent is required to ensure that Production Releases meet certain standards for successful deployment.

Deliverables:

A. Release and Deployment Support Plan and Package

5.3 BASE PERIOD DEVELOPMENT

The Contractor shall provide scrum teams to support all the services and deliverables identified in Section 5.2, including all subparagraphs, for delivery of system enhancements during the base period. For planning purposes, Attachment A, B and C provide the existing Epic User Story Lists that identify the initial user stories that represent the current product backlogs as an indicator of the skill sets required for these enhancements. Note that these backlogs are expected to evolve over time to reflect changing program priorities. The specific scope of functionality to be delivered for each release in the base period may include these or other backlog items and will be determined with VA Product/Project business owners prior to the start of each release cycle based on current business priorities. It is anticipated that the level of effort and mix of resources (i.e., scrum teams) necessary to complete each release will remain consistent through the base period releases. The Contractor shall provide 6 scrum teams (minimum 10 resources per team). An individual Scrum team is comprised of the appropriate distribution of cross functional roles that include a Project Manager, technical lead(s), developers, dedicated quality assurance and tester(s), technical analyst(s), and a Certified Scrum Master. Scrum teams should have a minimum of one (1) person per role. A Scrum Team may have one (1) or two (2) Technical Leads as part of the team that provide technical guidance, resolve technical impediments and develop source code. Each Scrum Team should also include a dedicated resource that is capable of elaborating complex requirements. A Certified Scrum Master is recommended per team; however, Certified Scrum Masters may be shared across two when appropriate size and technical leadership is available. The Contractor shall provide development management resources to support each release cycle, to include defect management following the release of all software into production. The Contractor shall add a separate Integration Team for planning and overseeing integrations across each task. The Integration Team shall be capable of developing both web and non-web based interfaces with various VA systems and must be staffed sufficiently enough to accept work from multiple CRM projects simultaneously without schedule blocking. At a minimum, the Integration Team shall consist of at least five (5) dedicated members: a Project Manager or Technical Lead to run/oversee the Integration Team, at least one (1) CRM Architect, at least one (1) Technical Analyst that can elaborate interface requirements as needed, and at least one (1) dedicated Developer. It is expected that Developers assigned to the individual development tasks will be required to provide input to the Integration Team on a regular basis.

5.3.1 BASE PERIOD PLANNING

The Contractor shall execute planning activities including contractor onboarding activities, required training, project planning activities, documentation review and architectural analysis. In addition, the Contractor shall conduct the Agile requirements elaboration activities listed in section 5.2.1.

5.4 OPERATIONS AND MAINTENANCE SUPPORT

System solution operation and maintenance (O&M) support act System solution operation and maintenance (O&M) support activities are related to the on-going support for the performance of routine, preventive, predictive, scheduled, and unscheduled actions aimed at maintaining the system performance by supporting the application from desktop to server, real time monitoring system performance metrics, and coordinating with other VA and non-VA systems. This includes performance monitoring and bug fixes, and preventing system/production failure by working with the hosting and development staff to properly size and deploy capabilities to support performance. In addition, O&M support activities include correcting production software defects with the goal of increasing efficiency and reliability on a continuous basis via bug fix/hotfix releases and deploying patches/upgrades as needed.

In support of these activities, the Contractor shall configure, develop, maintain, test, and deploy CRM maintenance releases and/or bug fix/hotfix releases applying the same life cycle tasks, as applicable, described in Section 5.2. The Contractor shall provide technical documentation and execute these life cycle processes throughout the period of performance to support the delivery of CRM functionality. Releases may occur after hours and/or on during the weekend. It is expected that all deployment release packages are completely developed and SME advisory and troubleshooting support is provided. For Production releases, Contractor support staff shall be identified and available if there is a problem.

In the performance of the tasks, the Level of Effort (LOE) varies by application, depending on the level of operations and maintenance efforts required. The LOE has been classified as delineated below.

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Level of Effort (LOE)	Description of LOE	Categorization of Existing Applications
Low	Application to be sustained with no additional active development effort/project associated	• VA Telephone Operator (VATO) • Education Call Center (ECC) • CRM/Unified Desktop (CRM/UD) • Chat and Co-Browse
High	Application to be sustained simultaneously with an associated active development effort/project OR if the application requires continuous changes such as re-indexing due to deployment to additional users (e.g., internet users).	• CRM Enterprise (CRMe) • CRM/UD-Optimization (CRM/UD-O) • VA Medical Center (VAMC) Contact Center Modernization (VCCM) • Chief Business Office, Purchased Care (CBOPC) • Vocational Rehabilitation and Employment (VRE) • Purchased Care Non-VA/Call Center Way Forward (PCNV/CCWF) • Member Services CRM (HRC and HEC) • CRM Veterans Crisis Line (CRM VCL) • Knowledge Management (KM) • Veterans Enterprise Management System (VEMS) • Telehealth Management Platform (TMP)

The below table depicts the applicability of required O&M support for “Low” and “High” applications.

	LOW	HIGH
Change And Configuration Management Support	X	X
Application Support/End User Management	X	X
Maintenance Release Deployment Management		X
Database Administration Support	X	X
Database Migration Support		X
Operational Support	X	X
Service Desk Support	X	X
Testing Support	X	X
Technical Subject Matter Expertise Support	X	X

Tech Refresh		**X**
Cots Software Patches	**X**	**X**

The Contractor shall perform an O&M Phase In transition, as detailed in Section 5.5.1, for all currently support Core and non-Core CRM applications reference below. The following applications represent what are considered the current Core-CRM Program applications that are currently being maintained (additional applications anticipated in the future will be exercised via optional tasks):

1. VA Telephone Operator (VATO)
2. CRM Enterprise (CRMe)
3. CRM/Unified Desktop (CRM/UD) / CRM/UD-Optimization (CRM/UD-O)
4. VA Medical Center (VAMC) Contact Center Modernization (VCCM) (also known as Fix the Phones (FtP))
5. Chief Business Office, Purchased Care (CBOPC) (formerly known as PC@HAC and currently referred to as "Family CRM (FM CRM)" or "VHA Community Care")
6. Education Call Center (ECC)
7. Vocational Rehabilitation and Employment (VRE)
8. Purchased Care Non-VA/Call Center Way Forward (PCNV/CCWF) (also known as Community Care CRM)
9. Member Services CRM (also known as Health Resource Center (HRC) and Health Eligibility Center (HEC))
10. CRM Veterans Crisis Line (CRM VCL)
11. Chat and Co-Browse/Analytics
12. Knowledge Management (KM)/Analytics

The following applications represent what are considered the current Non-Core CRM Program applications that are currently maintained as contracted by contract options (additional applications anticipated in the future):

1. Telehealth Management Platform (TMP) (also known as Clinical Video Telehealth (CVT)/Telehealth Scheduling System (TSS)
2. Veterans Enterprise Management System (VEMS)

The Contractor shall provide O&M support on a prorated monthly basis during Option Period 1, if exercised. Currently CRM is receiving O&M support on a separate task order until September 24, 2018. It is VA's intent to exercise a transition-in optional task IAW PWS Paragraph 5.5.1, 2 months prior to September 24, 2018. Additionally, VA intends on ensuring that the O&M support for the core-CRM applications will commence on September 25, 2018 and will be coterminous with the PoP of Option Period 1.

5.4.1 CHANGE AND CONFIGURATION MANAGEMENT SUPPORT

Change and Configuration Management addresses the governance, process, roles and responsibilities for the intake, disposition, and documentation of configuration and/or code changes under the direction of VA in support of applications that have been deployed to production.

The Contractor shall:

1. Update the existing Change and Configuration Management Plan.
2. Perform technical analysis to include: identifying dependencies on other tasks; estimating the level of effort to address defects and change requests; assessing the impact of changes on the existing system; and classifying changes as indicated below:
    a. Corrective Sustainment which is the diagnosis and correction of program errors after software release.
    b. Adaptive Sustainment which is the modification of software to interface with a changing environment or congressional mandates.
    c. Preventive Sustainment which is the modification of software to improve future maintainability or reliability as a result of a requirement to perform a hardware re-platform or operating system/system software upgrade.
    d. Perfective Sustainment which is the modification of the software to improve future functionality based on CRM best practice recommended by the CRM Subject Matter Experts (SMEs), sustainment staff and business. This shall include software patches, code optimization and incorporation of upgraded and effective software or plugins to improve performance and usability. The perfective sustainment shall be controlled by the CRM enterprise governance.
3. Schedule Change Control Board (CCB) meetings, prepare agendas and distribute meeting materials under the COR and VA Product Owner's direction. During these meetings, the Contractor shall:
    a. Facilitate discussion and coordinate approval decisions of application defects, change requests, and elicit clarification of technical requirements, including assignment of priorities to defects and changes.
    b. Distribute draft CCB meeting minutes, receive and incorporate comments, and distribute a final version of the meeting minutes.
4. Update Rational Team Concert (RTC) based on the outcome of change and configuration management processes. This shall include:
    a. Revision of the functional and technical requirements and user stories in RTC which shall be mapped to the existing requirements affected.
    b. Creation of a ranked Product Backlog Report sorted by the priority assigned by the CCB.

c. Record and manage new defects in RTC.

Deliverables:

A. Updated Change and Configuration Management Plan
B. Ranked Product Backlog Report

5.4.2 APPLICATION SUPPORT/END USER MANAGEMENT

The Contractor shall:

1. Create, retrieve/reset, update, and delete user accounts and profiles; provide maintenance support including managing Business units and Teams where applicable.
2. Provide a CRM Users List Report, utilizing current user lists, to VA of all active and deactivated Users as changes are made.
3. Manage all CRM users and credentials in the production related CRM environments including integration, QA, training, pre-prod and production.

Deliverables:

A. CRM Users List Report

5.4.3 MAINTENANCE RELEASE DEPLOYMENT MANAGEMENT

Maintenance Release Deployment refers to all of the activities that support the promotion of developed functionality, after User Acceptance Testing (UAT), from a lower level environment (i.e., Quality Assurance, Integration, Pre-Production, etc.) to the Production environment as defined in section 5.2, in close coordination with the CRM Hosting provider and Developer as necessary. For the Option Periods, this support shall be provided for all these environments as well as the training environment. The Contractor shall provide maintenance and release deployment management and support for the applications in production and ensure completion of all the tasks and deliverables detailed in Section 5.2.5 (Release and Deployment Package) for each release as needed, following guidance from a VA Release Agent. The Contractor shall also provide Unified Service Desk (USD) support where applicable. Releases shall occur as specified in the resolution requirements within the Severity Levels table in section 5.4.5.

5.4.4 DATABASE ADMINISTRATION SUPPORT

The Contractor shall provide database administration for all the CRM applications it supports that are hosted in the CRM Hosting cloud. As part of database administration support, the Contractor shall:

1. Install, manage, and maintain MS SQL service instances for all CRM projects.
2. Create new database for the production environments.
3. Perform daily backup and restore databases as required.

4. Create database-level accounts needed for CRM Organizations.
5. Manage database permissions.
6. Troubleshoot back-end database issues.
7. Document bug and errors in RTC and provide Bug and Error Reports and remediate as necessary.
8. Ensure proper SQL Service licensing is applied to the CRM instances.
9. Support, configure and administer MS SQL Server Reporting Services.
10. Support, administer and configure KM and Chat & Co-Browse databases and file servers.
11. Upgrade databases as required to maintain conformity with VA enterprise versioning standards.
12. Provide database administration for all tools supporting development and testing to include load generator software.
13. Provide Database Maintenance Log.

Deliverables:

A. Bug and Error Report
B. Database Maintenance Log

5.4.5 DATABASE MIGRATION SUPPORT

The Contractor shall provide database migration support for all the CRM applications it supports that are hosted in the CRM Hosting cloud. As part of database migration support, the Contractor shall:

1. Migrate an existing database schema to an updated database schema as required (i.e., migrate data from a legacy database to a modified database)
2. Support modification of the database schema as required

5.4.6 OPERATIONAL SUPPORT

The Contractor shall support routine operations from 6:00 AM to 10:00 PM Eastern Standard Time, Monday through Friday except for federal holidays for applications specified as standard operations for the non-core applications. The contractor shall support 24x7 for core-CRM applications specified as on all the time (e.g. Veteran Crisis Line). The Contractor shall support applications in either FISMA medium or FISMA High environment. The Contractor shall also be required to support, on-call 24/7 operations 365 days per year to support emergency maintenance requirements for the application in the 6AM to 10 AM support that are categorized as Severity 1 production incidents. The Contractor shall:

1. Use the following toolsets for operations and maintenance support:
    a) VA Provided GFE
    b) NSD SDM – VA will provide access to SDM.

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    c) MS SharePoint (VA tool that the Contractor will be given access to) and the MS Office product suite (can be accessed through CAG or Contractor can provide).
    d) RTC - VA will provide licenses.

2. Coordinate with VA and other support Contractor personnel to manage and document operational support ticket routing and workflow.
3. Evaluate, research, and respond to production support issues, which include application-specific trouble tickets and reports of defects.
4. Call Strengths, Weaknesses, Opportunities, and Threats (SWOT) teams when a production problem occurs.

5. Receive, evaluate, research, and respond to trouble tickets in Issue Tracking Tool. Unless directed otherwise by the COR, the Contractor shall address all application-specific trouble tickets in the following hierarchical order: by priority, date the ticket was created, urgency, and impact.

6. Document and track production support issues that are considered application defects as Defect Work Items in the appropriate toolset and map them to the existing requirements for defect resolution. All defects shall be recorded and updated in the Rational Tool Suite.

7. Develop root cause analyses for Priority 1 trouble tickets and Severity 1 defects

8. Develop After Action Report (AAR) for all Priority 1 and 2 and Severity 1 and 2 production support issues.

9. Provide a monthly report of all Rational Team Concert (RTC) Defects, National Service Desk (NSD) tickets and CRM Cloud tickets per CRM application.

10. Identify, develop and deploy bug fixes to defects by severity level, priority, and the date the defect was reported, unless directed otherwise by the COR. For each sustainment bug fix/hot fix release to Production, the contractor shall provide a bug fix/hot fix release package in Rational Tools, consisting of the following artifacts as currently required by the VA Release Readiness Office:

a) Upload the following into Change and Configuration Management (CCM) > Source Control > Documentation Stream in Rational:
    a. Version Description Document (VDD)
    b. Defect Log
    c. Updated Installation/Back-Out/Rollback Plan
    d. If defect repair is addressing a 508 compliance issue, also upload the Section 508 compliance verification test results and any additional 508 compliance documentation required by the VA Section 508 Office.
    e. If a defect repair will change/impact any security features or controls, the Contractor shall perform a Fortify Scan of the software and upload the scan results (the results shall also be provided to the CRM Security Team in order to update A&A documentation as required to maintain the hosting and application ATOs).

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The Contractor shall meet the Severity Levels task requirements as outlined in the table below.
When performing operational support. Incident, Problem, Event Management Reports shall provide the following metrics:

a. Defect Backlog - Quantity closed, reassigned, revised, and those remaining open from the defect backlog assumed at completion of the phase-in transition
b. Ticket Volume - Quantity received, closed, reassigned, new tickets created (by the Contractor), or those introduced due to new releases and as classified by severity. These metrics shall be referenced both as a weekly (or more frequently as directed) variable and a cumulative, running total throughout the contract period.
c. Timeliness of trouble ticket resolution in accordance with the severity levels metrics below - to include average (mean and median) number of days to close a ticket, and average (mean and median) age of tickets. The source data used as the basis for these counts to include identification of date opened and date closed for each ticket will be made available upon the COR's request.

11. Execute a minimum of two (2) sustainment bug fix/hot fix releases per application per year (12 months) in addition to the resolution requirements in the Severity Levels table below.

Deliverables:

A. Root Cause Analysis Report
B. After Action Report
C. Incident, Problem, Event Management Report
D. Sustainment Bug Fix/Hot Fix Rational Package
E. Report of RTC Defects, National Service Desk (NSD) Tickets and CRM Cloud tickets per application

Severity Levels

LEVEL	DEFINITION	REQUIREMENT
Severity 1 – Critical – Inoperable	Defect prevents or precludes the performance of an operational or mission essential capability, jeopardizes security, causes the system, application, process or	**Notification to VA:** 1. Respond within 1 hour of discovery during business hours (7:00 AM – 6:00 PM) 2. Analyze and correct the issue, documenting Root Cause Analysis (RCA) and

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	function to not respond or end abnormally. A work around does not exist or is not feasible. For example, call center staff is not able to use the tool to communicate with clinical staff, and/or each other regarding patient care, including telephone triage of patient symptoms, defects in firewall allow security breach or system event causes essential or end-to-end application failure. **Other Considerations:** - Defect affects one or more Medical Centers (VAMC) / VISN telephone triage patient care call centers - Defect has potential for Adverse Department publicity - Defect has potential to cause a VAMC / VISN telephone triage patient care call center work stoppage	updating the RCA report daily until remediation is complete. 3. Alert the PM, COR, and VA OIT organizations with sustainment responsibilities to issues that are unrelated to the application code or architecture within 1 hour of discovery. Review Priority 1 and Severity 1 issues that are unrelated to the application code or architecture with the PM and/or COR within 1 business day of discovery. 5. Generate, store, track and maintain an After Action Report (AAR) within 3 business days following remediation. AARs shall detail methods employed to resolve defects and efforts employed to minimize recurrence. 6. Contractor may be required to work extended hours as severity 1 issues are worked until resolution **Resolution:** The Contractor shall resolve as soon as possible, with all resources working 24/7 until resolution. Resolution will result in an emergency release.

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Severity 2 – Major – Operable in degraded mode	A process does not work as specified and/or produces an error that degrades or impacts the system or user functionality. A work around does not exist or is not feasible. Examples are: inability to capture Veteran contact information which is a significant patient safety issue for Veterans who have medical issues that require advice nurse triage services and the inability to contact patient care teams within 1 business day. **Other Considerations:** • Defect affects a portion of Medical Centers' (VAMCs) and/or VISN telephone triage patient care call centers' operations effort • System performance is degraded	**Notification to VA:** 1. Respond within 4 business hours of discovery. Business hours are 7:00AM – 6:00PM. 2. Alert the PM, COR, and VA OIT organizations with sustainment responsibilities to issues that are unrelated to the application code or architecture within 1 business day of discovery. Generate, store, track, and maintain an AAR within 5 business days. AARs shall detail methods employed to resolve defects and efforts employed to minimize recurrence. **Resolution:** The Contractor shall resolve as soon as possible, with all resources working 24/7 until resolution. Resolution may or may not result in an emergency release.
Severity 3 – Average – Work around exists	A process does not work as specified and/or produces an error that degrades or impacts the system or user functionality. A work around has been developed that provides the required functionality until a fix can be applied. A fix should be applied as soon as feasible. Examples are	**Notification to VA:** 1. Respond within 3 business days of discovery. 2. Alert the PM, COR, and VA OIT organizations with sustainment responsibilities to issues that are unrelated to the application code or architecture within 3 business days of discovery.

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	valid data is not accepted, data recorded to the database is incorrect or incomplete, incorrect or incomplete data is displayed on-screen or in a report, an edit is missing against invalid data, or invalid edits occur against valid data. **Other Considerations:** - Workaround requires significant field operations effort. - System performance is degraded	**Resolution:** Any existing Severity 3 defects shall be addressed within 6 months or less of task order award. Hereafter, any new Severity 3 defects shall be resolved and included in a bug fix/hotfix release on a quarterly basis.
Severity 4 – Minor	Minor defect that is cosmetic or inconvenient but does not prevent user from using the system to accomplish their task. For example, the screen display or hardcopy report contains errors in spelling, grammar, or alignment, navigation is inconsistent, or error messages are incorrect. Minor defect fixes can be applied as schedule allows. **Other Considerations:** - Defect affects few field employees - Defect has little or no potential for adverse publicity at VAMCs, VISNs, or higher levels.	**Notification to VA:** 1. Respond within 3 business days of discovery. 2. Alert the PM, COR, and VA OIT organizations with sustainment responsibilities to issues that are unrelated to the application code or architecture within 3 business days of discovery. **Resolution:** Any existing Severity 4 defects shall be addressed within 6 months or less of task order award. Hereafter, any new Severity 4 defects shall be resolved and included in a bug fix/hotfix release on a quarterly basis.

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Production Support Issues	For all production support issues, regardless of priority or severity, the Contractor shall: 1. Update trouble tickets with the current status and a description of the solution or activities in progress to resolve the trouble ticket. 2. Document and track production support issues that are considered application defects as Defect Work Items in RTC and map them to the existing requirements for defect resolution. 3. Request approval from the COR to change the priority and/or severity of a production support issue when the Contractor believes the priority and/or severity level is incorrect.	**Notification to VA:** Status updates shall be completed each time the status of a ticket changes within 24 hours of the change.

Priority Levels

PRIORITY	DEFINITION
Priority 1 - Resolve Immediately	Further development and/or testing cannot occur until the defect has been repaired. The system cannot be used until the repair has been affected.
Priority 2 - Give High Attention	The defect must be resolved as soon as possible because it is impairing development and/or testing activities. System use will be severely affected until the defect is fixed.
Priority 3 - Normal Queue	The defect shall be resolved in the normal course of development activities. It can wait until a new build/version.
Priority 4 - Low Priority	The defect is an irritant that shall be repaired but only after more serious defects are fixed.

5.4.7 SERVICE DESK SUPPORT

The Service Desk is a component of the overall Production Incident Escalation Communication process. All user support calls are initially sent to the VA National Service Desk (NSD), which is responsible for Tier 1 support within the CRM Production Incident Escalation Communication process. VA NSD uses the Service Desk Manager (SDM) tool to track all support calls. VA NSD will address any issues with the desktop, user access, network access, and printing.

Any issues that are specifically related to the CRM Applications shall be forwarded to the Contractor Service Desk, which is responsible for Tier 2 support within the Production Incident Escalation Communication process for resolution.

The Contractor shall:

1. Operate the Service Desk to provide all required Tier 2 support. Tier 2 support is described in Paragraph 5.4.6.1.
2. Respond to all issues that the VA NSD identifies as Tier 3 or Tier 4 CRM issues. Tier 3 and Tier 4 support is described in Paragraph 5.4.6.2 below.
3. Support the Service Desk from 6:00 AM to 10:00 PM Eastern Standard Time, Monday through Friday except for federal holidays for non-core applications. Support 24x7 for applications specified as core-CRM applications.
4. Provide on-call personnel to support resolution of critical and serious severity code tickets for Tier 2, 3, or 4 issues received from the VA NSD after hours.

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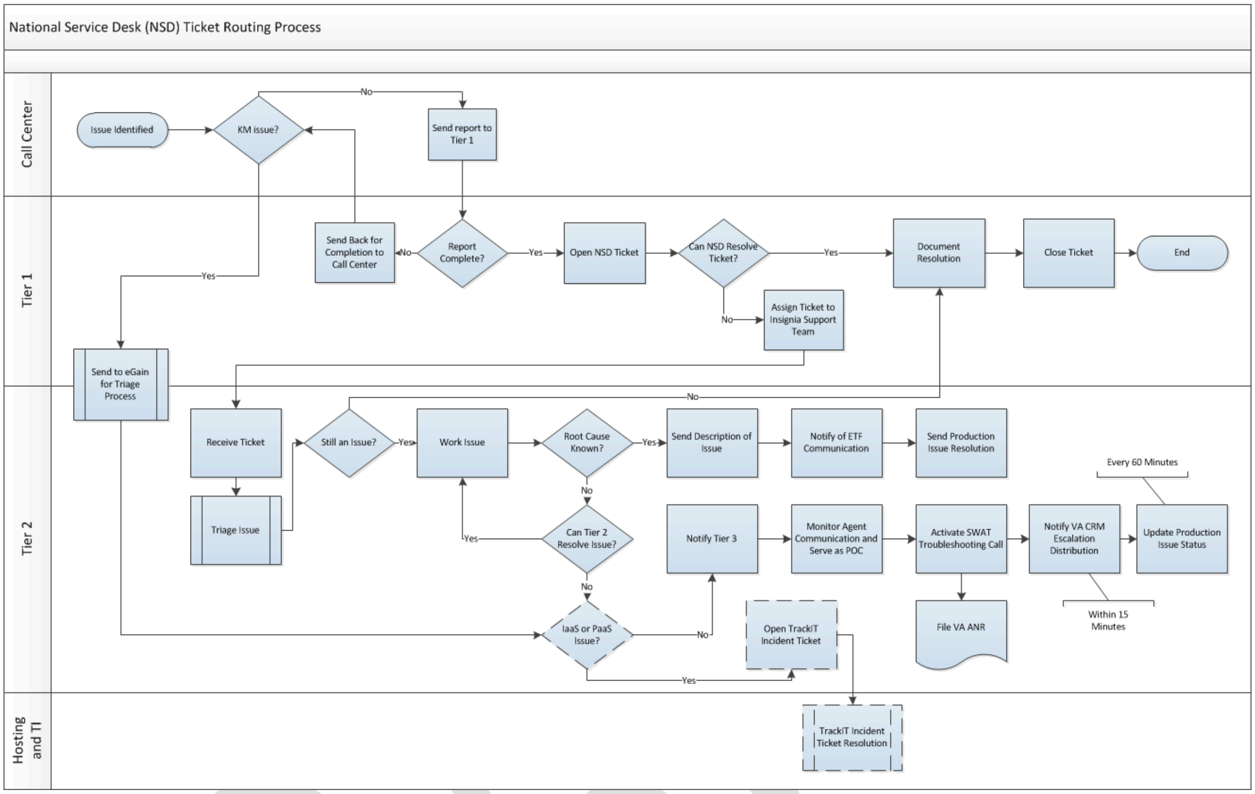

Incident Reporting and Notification Process Flow

5. Utilize and update, as needed, the existing VRM/CRM Production Incident Escalation Communication Plan to develop an overarching Communication Plan for CRM Help Desk Support. It shall include:
    a. The flow between the Contractor, the NSD, the VA PMO/business, and any other technical team related to support maintenance
    b. Communications and notification methods
    c. Stakeholder roles
    d. Contact lists and information
6. Respond to the CRM end users to obtain more information and provide workarounds or one-on-one training support.
7. Work with the CRM Operational Teams and development Contractors to resolve the issues.
8. Gather and report metrics to validate that the SLAs (VA has established the SLAs for all production applications) are being met.

VA NSD Production System SLAs

Code	Customer Impact	Response to	Resolution Goal

		Customer	
1 – Critical	Production System Unavailable	0-15 minutes	0-2 business hours
2 – Major	Production System Delayed (Potential Impact on Business Function)	0-60 minutes	2-4 business hours
3 – Average	Production and Preproduction (Available - No Business Impact)	0-4 business hours	4-8 business hours
4 – Minor	New Service/Program Addition		

5.4.7.1 TIER 2 SUPPORT

The Contractor shall provide Tier 2 support to include the following:

1. Review the issue information provided through the NSD and respond to the customer in accordance with the SLA defined in the above table.
2. Use the SDM tool, provided through the VA NSD, to retrieve Tier 1 ticket information in support of Tier 2 resolution.
3. Contact the customer/user if more information is required, to provide resolution recommendations, or to provide a status. All information gathered shall be provided to the Service Center to update the Remedy ticket.
4. Contact the customer/user and provide a recommended resolution to the issue, including a workaround provided by the business sponsor, where available. The Contractor shall walk the user through the resolution recommendation. The Contractor shall document resolution results and provide the information to the Service operator for entry into the SDM ticket. The Contractor shall update the SDM ticket with the resolution so that the Tier 1 service providers can use to assist users experiencing the same issue.
5. Contact the customer/user and provide one-on-one training support to walk the user through the operation of the system if the issue is the result of a known user error. The Contractor shall document the training provided to the Service operator for entry into the SDM ticket.
6. Gather enough additional information, including at a minimum, verbal details, emailed Incident Report forms, and screenshots to determine the severity of the incident; the severity level in accordance with the SLA table shall be logged in the SDM ticket.

7. Notify the Government VA Service Desk Manager and present all the information about any incidents that are determined to be a severity code 1 or 2.
8. Support crisis incident escalation processes, including transferring the incident to the Triage 1 Team, and contacting CRM Project Management. If the incident is determined to be a severity code 3, the Contractor shall attempt to replicate or troubleshoot the incident as part of the incident verification/validation process. If the severity code 3 issue cannot be resolved, the Contractor shall transfer the Incident to the Triage 1 Team and contact CRM Project Management. For all issues forwarded to the Triage 1 Team, the Contractor shall continue to interface with the customer/user to request more information and to update status. After the customer/user is notified of the resolution or incident transfer and is satisfied with the actions taken, the Contractor shall ensure that the resolution fixed the issue and shall update and close the incident ticket.
9. Support application end user account provisioning in the Production and subordinate environments. This includes creating, retrieving/resetting, updating, and deleting accounts.

5.4.7.2 TIER 3 AND 4 SUPPORT

The Contractor shall:

1. Submit all issues that cannot be resolved by direct interface to the customer/user for Tier 3 Support to the Tier 3 CRM Site Operation Teams using the SDM system, program log, and during daily communication. The Contractor shall ensure that the CRM Program Manager and COR is aware of the severity code and the time when the incident was reported.
2. Support the Triage 1 Team in coordination with the Tier 3 CRM Site Operation Teams. CRM Site Operations Support Team members are as follows: CRM Lead Engineer; Operations Support Team; Information Assurance Team; and the CRM Maintenance team. The Triage 1 Team shall assess the scope and impact of the unresolved incident, and determine if the incident relates to problems associated with:
    a. Infrastructure
    b. Application/Development
    c. Benefits Enterprise Platform
    d. VETSNET
    e. Other interfaces as defined in section 5.2.3.
    f. User Error
    g. Access Control
    h. Slow Performance
    i. Lost Data
    j. Incorrect Data

    k. Requirement Request
    l. System Outage
3. Coordinate requests if the Tier 3 VA Site Operation Teams needs to contact the customer for more information. The Contractor providing Tier 2 Support is the only level to have initial or follow up contact with the customer for customer management support.
4. Notify the customer of the resolution and close the incident ticket if the problem is isolated to something other than a defect in the application software and is resolved by the Tier 3 CRM Team, a Tier 3 CRM analyst shall update the incident ticket and notify the Contractor of resolution.
5. Support Triage 2, in coordination with Tier 4 analysts, if the incident cannot be resolved at the Triage 1 level; and if the incident is not a determined defect, Triage 2 is initiated. Triage 2 team members work together to coordinate a plan of action to further analyze the issue, possibly reaching out to other development members. If any Tier 4 analysts need to contact the customer, the Contractor shall be required to coordinate these requests for more information.
6. Transfer the incident via SDM to the CRM Defect Management Team if the problem is isolated to a defect in the application software (as the incident then becomes the responsibility of the CRM Defect Management Team.) The CRM Defect Management Team will follow the Defect Management Process. The Contractor shall then update the ticket in SDM with "In Progress" status.
7. Work in tandem with Triage teams for all incident updates as they occur. Triage members will contact the Contractor directly with updates or resolution. The Contractor shall then update the ticket in SDM and inform the customer of the resolution and close the incident ticket. The Contract shall also prepare or update Service Desk response scripts.
8. Develop and prepare (in support of Tier 3 and Tier 4 issue resolution) Statistical and Analytical Reports related to CRM performance and functionality. The Contractor shall determine analysis and monitoring tools to configure, automate, monitor, alert and provide remediation recommendations of the CRM Tier 3 and Tier 4 issues. This support shall include:
    a. Analysis and interpretation of CRM software application real time performance metrics.
    b. Analysis and interpretation of CRM system performance data, including utilization of information/data/statistics for all user groups, training levels, ingest/scanning status, workload management, systems software licensing and systems architecture status.
    c. Perform statistical analyses using advanced operations research techniques including mathematical models, matrices, instrumentation, modeling and/or simulation.
    d. Identification of systems and software application performance troubleshooting recommendations/solutions.

e. Development of alternative courses of action related to performance/functional analyses in terms of effectiveness, suitability, and costs.

Deliverables:

A. Service Desk Response Scripts
B. Statistical / Analytical Reports

5.4.7.3 SERVICE DESK DOCUMENTATION AND REPORTING

The Contractor shall:

1. Report all Service Desk issues identified as critical issues to the COR within thirty (30) minutes of receipt. Reports of actions being taken to resolve the issue shall be provided with updates hourly until full functionality is restored. A detailed outage report that documents the outage time, services impacted, cause of the outage, and actions taken to restore the system shall be produced by the Contractor after the incident is resolved and provided to the COR.
2. Provide a Service Desk Monthly Progress Report which documents issue status and Service desk metrics for all issues identified within a given month. The Contractor shall maintain an issues log with the issues reported, severity of the issue, response time, and resolution. The issues log shall be delivered with the Service Desk Monthly Progress Reports. The issues log shall include the date and time when the issue was reported, the person reporting the issue, the location reporting the issue, the severity code, the cause of the issue, a description of the issue, a workaround for the issue if relevant, the date and time the workaround was provided, the final solution to resolve the issue, and the resolution date and time. The cause categories shall include, at a minimum, system outage, user error, slow performance, lost data, incorrect data, and access control. The issues log for a specific time period shall be provided to the COR upon request.
3. Maintain service desk and reporting metrics, which shall be documented within the Service Desk Monthly Progress Reports. The following metrics shall be included:
    a. The number of issues by severity code
    b. The number of issues by location
    c. The number of issues by Cause
    d. The number of user error issues by location
4. Support weekly Executive Board and weekly “Pulse Check” meetings hosted by Senior OI&T, and Senior VBA/VHA leadership and provide status updates for high priority urgent issues. The Contractor shall respond to all requests for information regarding service desk, problem tickets.

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Deliverables:

A. Detailed Outage Reports
B. Service Desk Monthly Progress Reports

5.4.8 TESTING SUPPORT

The Contactor shall provide maintenance testing support services as part of the support for CRM. The CRM maintenance testing services shall include all end-to-end testing. The Contractor shall ensure completion of the all tasks and deliverables detailed in Section 5.2.4 (Solution Testing) for each release.

5.4.9 TECHNICAL SUBJECT MATTER EXPERTISE SUPPORT

The Contractor shall:

1. Participate, facilitate, and document design proposal impact due to maintenance work and attend change management meetings.
2. Provide subject matter expertise to analyze the outputs of the change management process.
3. Provide design proposal update recommendations for optimization, proactively as adaptive and preventive sustainment, as well as reactively for corrective sustainment and to address trouble tickets. The Contractor shall provide meeting agendas and minutes from the design requirements meeting(s).
4. Facilitate technical meeting(s) with VA business users and technical staff supplying subject matter expertise and analysis in regards defect management/code enhancements to identify how the user requirements will continue to be met and to determine technical reusability, modification of service components, and continuity of integration with VA systems interfaces.
5. Conduct a design concept review meeting to formally present the design to VA technical staff and the business sponsor(s) to ensure the design meets the intent of sustainment requirements. The Contractor shall provide meeting agendas and minutes from the design concept review meeting(s).
6. Maintain and update the existing Architecture Design Document to ensure integration with the VA system interfaces.
7. Maintain and update the existing data schemas that map data to each VA system interface. The Contractor shall facilitate coordination with the projects that support the systems with which the CRM interfaces.

Deliverables:

A. Design Requirements Meeting Agenda and Meeting Minutes
B. Design Concept Review Meeting Agenda and Meeting Minutes
C. Architecture Design Document
D. Updated Data Schemas

5.4.10 TECH REFRESH

The Contractor shall provide maintenance services to upgrade Microsoft Dynamics Commercial-Off-The-Shelf (COTS) solutions as new versions become available to all environments. These upgrades are anticipated to occur twice per year (12 mo. period).

The Contractor shall ensure all features, functionality, and capabilities that were present in production will remain. This includes user interface look and feel, workflow, automation, and interfaces with other applications. In support of these tech refreshes, the Contractor shall apply the same life cycle tasks described in section 5.2.

5.4.11 COTS SOFTWARE PATCHES

The Contractor shall support the CRM Cloud Hosting Team as needed in order to deploy COTS software patches (i.e., to Microsoft Dynamics, USD, eGain, etc.) as required/recommended by the vendor of the COTS Software for security or 508 conformance fixes. These software patches are anticipated to occur 10-20 times per month.

5.5 TRANSITION SUPPORT

5.5.1 CRM PHASE-IN TRANSITION SUPPORT (OPTIONAL TASK 1)

The Contractor shall:

1. Provide phase-in transition planning and execution of all PWS-specific content by the VA from existing Vendors associated with the programs during the transition period handing off work from outgoing vendor to the incoming vendor.
   Work closely with the outgoing vendor in a left seat right seat type of hand off to ensure knowledge transfer is thorough and all encompassing.
2. Conduct an initial Phase-In Transition Planning meeting within five (5) days of award, with the VA COR, VA organizations identified by the COR, the CRM PMO, and outgoing Vendor resources.
3. Document its approach and milestones to transfer the full lifecycle support requirements for all CRM Program applications' maintenance and application architecture responsibilities in a Phase-In Transition Plan. The Phase-In Transition Plan shall include:
   a. Review of legacy program documentation, product backlog and associated user stories in RTC, and metrics and statistics.
   b. Source code evaluations (to include versions in production and in development, maintenance updates and patches).
   c. The plan to participate, as an observer, in development and sustainment releases as well as maintenance updates and patches to be performed by the incumbent development Contractor for the purpose of facilitating knowledge transfer.

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   d. Milestone schedule of transition activities related to each existing application
      Roles and Responsibilities matrix showing key personnel for each application
   e. The plan to transition current support services.
   f. Details on accessing and assessment of application environment and tools.
   g. Transition coordination schedule to meet with Government and Contractor representatives, including all VA organizations that hold sustainment responsibilities, to confirm demarcation of responsibilities and interface points for performance of work elements.
   h. Transition schedule with tasks, duration, milestones, resource allocation, knowledge transfer sessions, and dates for completion of work transfer to Contractor.
   i. Risks and associated risk mitigation plans.
   j. Summary and schedule for Government-required training, clearance, and certification process.
   k. Sections dedicated to the transition of Operational and Help Desk support with a particular emphasis on integration with the outgoing Vendor Phase Out schedule and obtaining system access (VA Domain, SDM, Rational) to support seamless hand-off of responsibilities.

4. Conduct a Phase-in Transition In Progress Review (IPR) within ten days after the phase in transition plan meeting of the delivered plan with the VA COR, VA organizations identified by the COR, the CRM Program PMO, and outgoing Vendor resources.
5. Provide a weekly Phase-In Transition Status Report until the completion of the Knowledge Transfer / Phase-In Transition activities. The Contractor shall report:
   a. Percent complete of GFI documentation review
   b. Percent complete of code review
   c. Percent complete of required project staffing
   d. Risk identification and management
   e. Percent complete of knowledge transfer.

The Contractor shall complete transition within thirty (30) calendar days of COR approval of the Transition Plan.

Deliverables:

A. Phase-In Transition Plan
B. Weekly Phase-In Transition Status Report

5.5.2 CRM PHASE-OUT TRANSITION SUPPORT (OPTIONAL TASK 2)

The Contractor shall:

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1. Develop and deliver a Phase-Out Transition Plan in the event that all or part of the tasks are terminated or completely transitioned to the Government or a new Contractor at the end of the period of performance. The Contractor shall submit details for the Phase-Out portion of the Transition Plan, and execute the Phase-Out Transition Plan upon Government approval. The Transition Plan may be exercised by the Government anytime during the base and/or option periods. All transition actions shall be completed prior to end of PoP. The Contractor shall provide SME support for 30 days to affect the requisite knowledge transfer in accordance with the resulting Transition Plan and schedule. At a minimum, the Transition Plan shall include the following:
    a. Roster of key POCs with email address and telephone numbers
    b. Transition timeline with key milestones
    c. Data/databases
    d. Inventory and transition of historical data (e.g., memos, letters, correspondence, regulations, reports, documents, transition agreement documents, software licensing agreements, hardware maintenance agreement, memorandums of agreement/ understanding, and inter-service agreements)
    e. Procedural manuals/guidelines
    f. Operating instructions
    g. Data and workflow process
    h. Application scheduling process
    i. Templates used in day-to-day operations
    j. Orientation to introduce incumbent Contractor team, programs, and users to the incoming team, explaining tools, methodologies and business processes
    k. Procedures to introduce Government personnel, programs and users to the Contractor team's tools, methodologies and business processes
    l. Strategy and approach regarding personnel staffing and training during the transition period
    m. Process for transfer of on-hand inventory, if applicable
    n. Transition checklist
    o. Signed turnover agreements
2. Work collaboratively with other support Contractors and/or Government personnel. As part of collaboration, the Contractor shall convey any and all information, as it pertains to CRM projects, its processes, diagrams and any reports that emanates from the system that may be requested to support this collaboration. This support shall also consist of providing advice, clarification or explanation to facilitate the understanding of the information presented.

Deliverables:

A. Phase-out Transition Plan

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5.6 ADDITIONAL CRM DEVELOPMENT (OPTIONAL TASK 3)

CRM is constantly evolving to meet VA priorities and may require completion of additional projects throughout the PoP of this Task Order. VA may exercise this optional task for additional scrum teams to support development of CRM projects following the software development lifecycle described in Section 5.2, including all subparagraphs, of this PWS. The specific scope of functionality to be delivered for each build in the optional task will be determined with VA Product/Project business owners prior to the start of each build cycle based on current business priorities. The Contractor shall provide an additional scrum team (minimum of 10 resources made up of the appropriate technical skill sets) to support multiple builds throughout each PoP. This task may be exercised up to four 15 times in the base period and up to 20 times in each option period. The PoP of the optional task shall be coterminous with the PoP of the period in which it is exercised.

5.7 OPERATIONAL AND MAINTENANCE SUPPORT SERVICES FOR ADDITIONAL “LOW” & “HIGH” LEVEL OF EFFORT (LOE) APPLICATIONS (OPTIONAL TASK 4)

It is anticipated that additional “LOW” & “HIGH” LOE CRM applications will require operations and maintenance support during the overall period of performance as they transition from development to production. Please note that some applications may have been developed outside of this TO.

For each additional CRM application that transitions to production, if exercised, the Contractor shall perform the tasks identified in Section 5.4, Operation and Maintenance Support, Sections 5.4.1 through 5.4.9.

1. **Low LOE**. Up to 8 Low LOEs may be exercised during the overall period of performance of this order.

2. **High LOE**. Up to 16 High LOEs may be exercised during the overall period of performance of this order.

5.8 OPERATIONS AND MAINTENANCE LOE UPGRADE/DOWNGRADE (OPTIONAL TASK 5)

The Government reserves the right to change the LOE categorization of any given application from Low to High or High to Low as circumstances change over time.

If exercised, the Contractor shall adjust the quantity of “Low” and “High” LOE on an application basis and shall be true-upped on a yearly basis to be coterminous with the commencement of the option periods, if exercised.

5.9 OPERATIONAL AND MAINTENANCE SUPPORT SERVICES FOR FEDERAL CASE MANAGEMENT (FCMT) (OPTIONAL TASK 6)

This optional task may be exercised during each period of performance including the base period and/or option periods 1, 2, and 3. The Contractor shall provide operational and maintenance support for the FCMT application. The Contractor shall perform the tasks identified in Section 5.4, Operation and Maintenance Support, Sections 5.4.1 through 5.4.9.

5.10 OPERATIONAL AND MAINTENANCE SUPPORT SERVICES FOR INTERAGENCY COORDINATION PROGRAM (ICP) (OPTIONAL TASK 7)

This optional task may be exercised during each period of performance including the base period and/or option periods 1, 2, and 3. The Contractor shall provide operational and maintenance support for the ICP application. The Contractor shall perform the tasks identified in Section 5.4, Operation and Maintenance Support, Sections 5.4.1 through 5.4.9.

5.11 OPRERATIONAL AND MAINTENANCE SUPPORT SERVICES FOR BENEFICIARY FIDUCIARY FIELD SYSTEM (BFFS) (OPTIONAL TASK 8)

This optional task may be exercised during each period of performance including the base period and/or option periods 1, 2, and 3. The Contractor shall provide operational and maintenance support for the BFFS application. The Contractor shall perform the tasks identified in Section 5.4, Operation and Maintenance Support, Sections 5.4.1 through 5.4.9.

5.12 OPERATIONAL AND MAINTENANCE SUPPORT SERVICES FOR TELEHEALTH MANAGEMENT PLATFORM (TMP) ALSO KNOWN AS CLINICAL VIDEO TELEHEALTH (CVT) TELEHEALTH SCHEDULING SYSTEM (TSS) (OPTIONAL TASK 9)

This optional task may be exercised during each period of performance including the base period and/or option periods 1, 2, and 3. The Contractor shall provide operational and maintenance support for the TMP application. The Contractor shall perform the tasks identified in Section 5.4, Operation and Maintenance Support, Sections 5.4.1 through 5.4.9.

5.13 OPERATIONAL AND MAINTENANCE SUPPORT SERVICES FOR VETERANS ENTERPRISE MANAGEMENT SYSTEMS (VEMS) (OPTIONAL TASK 10)

This optional task may be exercised during each period of performance including the base period and/or option periods 1, 2, and 3. The Contractor shall provide operational and maintenance support for the VEMS application. The Contractor shall perform the

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tasks identified in Section 5.4, Operation and Maintenance Support, Sections 5.4.1 through 5.4.9.

All unique conditions in addition to the base level of effort are to be handled by the exercise of optional tasks. Applications may be augmented with optional tasks for such situations as: new compliancy requirements, incomplete or invalid documentation at the time of transition or as indicated within the scope of specific optional tasks, or for re-hosting or re-platforming with significant impact on application code and/or preventive/perfective maintenance to improve the quality and performance of software.

Application-specific tasks which require ongoing maintenance are included in Section 5.4 and will be executed as a part of the base contract.

5.14 OPERATIONAL AND MAINTENANCE SUPPORT SERVICES FOR SERVICE DESK SUPPORT (OPTIONAL TASK 11)

If exercised, the Contractor shall provide 24x7x365 operational and service desk support services for Low and High LOEs.

5.15 MINOR FUNCTIONAL AUGMENTATION (OPTIONAL TASK 12)

This optional task shall be completed no later than six months from date of task exercise. This task may be exercised multiple times per an application at the discretion of the Government, based on application size during the base period and each option period of performance. These services shall include planning, integration, stakeholder coordination, configuration management, test, release, production support and warranty in accordance with all requirements under this task order.

The price for each sustainment effort shall be negotiated on a FFP basis prior to each exercise of this optional task. The Government will utilize the proposed firm fixed price labor rates which shall be incorporated into the order at time of award as set forth in the Price Schedule.

VA may exercise Optional Task 11 upon written notification from the Contracting Officer. The Contractor shall provide VA with a written proposal detailing the requirements, resources and pricing, utilizing the labor categories and rates set forth in the Price Schedule, upon VA request for additional sustainment support to the application specified prior Optional Task 10 proposal. VA will perform an analysis to determine if the approach and technical and price proposed are reasonable.

5.16 WARRANTY SUPPORT (OPTIONAL TASK 13)

Upon exercise of this task, the Contractor shall provide continued defect management support and coordination as described in PWS paragraph 5.2.3.4. This task, if

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exercised, is intended to support all code that was released into production (code released into production with less than 90 days remaining in the PoP) prior to the expiration of the period in which this optional task is exercised. The warranty shall be for a period of 90 days from date of exercise.

Deliverables:

A. Monthly Post Deployment Support Report
B. Monthly Defect Resolution Plan

6.0 GENERAL REQUIREMENTS

6.1 PERFORMANCE METRICS

The table below defines the Performance Standards and Acceptable Levels of Performance associated with this effort.

Performance Objective	Performance Standard	Acceptable Levels of Performance
A. Technical / Quality of Product or Service	1. Shows understanding of requirements 2. Efficient and effective in meeting requirements 3. Meets technical needs and mission requirements 4. Provides quality services/products	Satisfactory or higher
B. Project Milestones and Schedule	1. Quick response capability 2. Products completed, reviewed, delivered in accordance with the established schedule 3. Notifies customer in advance of potential problems	Satisfactory or higher
C. Cost & Staffing	1. Currency of expertise and staffing levels appropriate 2. Personnel possess necessary knowledge, skills and abilities to perform tasks	Satisfactory or higher
D. Management	1. Integration and coordination of all	Satisfactory or higher

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Performance Objective	Performance Standard	Acceptable Levels of Performance
	activities to execute effort	

The COR will utilize a Quality Assurance Surveillance Plan (QASP) throughout the life of the TO to ensure that the Contractor is performing the services required by this PWS in an acceptable level of performance. The Government reserves the right to alter or change the QASP at its own discretion. A Performance Based Service Assessment will be used by the COR in accordance with the QASP to assess Contractor performance.

6.2 SECTION 508 – ELECTRONIC AND INFORMATION TECHNOLOGY (EIT) STANDARDS

On August 7, 1998, Section 508 of the Rehabilitation Act of 1973 was amended to require that when Federal departments or agencies develop, procure, maintain, or use Electronic and Information Technology, that they shall ensure it allows Federal employees with disabilities to have access to and use of information and data that is comparable to the access to and use of information and data by other Federal employees. Section 508 required the Architectural and Transportation Barriers Compliance Board (Access Board) to publish standards setting forth a definition of electronic and information technology and the technical and functional criteria for such technology to comply with Section 508. These standards have been developed are published with an effective date of December 21, 2000. Federal departments and agencies shall develop all Electronic and Information Technology requirements to comply with the standards found in 36 CFR 1194.

The following Section 508 Requirements supersede Addendum A, Section A3 from the T4NG Basic PWS.

The Section 508 standards established by the Architectural and Transportation Barriers Compliance Board (Access Board) are incorporated into, and made part of all VA orders, solicitations and purchase orders developed to procure Electronic and Information Technology (EIT). These standards are found in their entirety at: https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-section-508-standards/section-508-standards and http://www.section508.gov/content/learn/standards. A printed copy of the standards will be supplied upon request. The Contractor shall comply with the technical standards as marked:

☒ § 1194.21 Software applications and operating systems
☒ § 1194.22 Web-based intranet and internet information and applications

- ☒ § 1194.23 Telecommunications products
- ☒ § 1194.24 Video and multimedia products
- ☒ § 1194.25 Self-contained, closed products
- ☒ § 1194.26 Desktop and portable computers
- ☒ § 1194.31 Functional Performance Criteria
- ☒ § 1194.41 Information, Documentation, and Support

6.2.1 EQUIVALENT FACILITATION

Alternatively, offerors may propose products and services that provide equivalent facilitation, pursuant to Section 508, subpart A, §1194.5. Such offerors will be considered to have provided equivalent facilitation when the proposed deliverables result in substantially equivalent or greater access to and use of information for those with disabilities.

6.2.2 COMPATIBILITY WITH ASSISTIVE TECHNOLOGY

The Section 508 standards do not require the installation of specific accessibility-related software or the attachment of an assistive technology device. Section 508 requires that the EIT be compatible with such software and devices so that EIT can be accessible to and usable by individuals using assistive technology, including but not limited to screen readers, screen magnifiers, and speech recognition software.

6.2.3 ACCEPTANCE AND ACCEPTANCE TESTING

Deliverables resulting from this solicitation will be accepted based in part on satisfaction of the identified Section 508 standards' requirements for accessibility and must include final test results demonstrating Section 508 compliance.

Deliverables should meet applicable accessibility requirements and should not adversely affect accessibility features of existing EIT technologies. The Government reserves the right to independently test for Section 508 Compliance before delivery. The Contractor shall be able to demonstrate Section 508 Compliance upon delivery.

Automated test tools and manual techniques are used in the VA Section 508 compliance assessment. Additional information concerning tools and resources can be found at http://www.section508.va.gov/section508/Resources.asp.

Deliverable:

A. Final Section 508 Compliance Test Results

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