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

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

Government Microsoft Dynamics 365 (D365) Development and Operations (DevOps)

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Request for Information (RFI)
****This posting is not a formal request for quote, but rather a market research request to determine if there are viable sources to provide the above requirement.****

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1.0 BACKGROUND

The mission of the Department of Veterans Affairs (VA), Office of Information and Technology (OI&T), Enterprise Program Management Office (EPMO) 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.

Currently OI&T uses Government Microsoft (MS) Dynamics 365 (D365) for two core functions:

1. Information retrieval from multiple sources, external to D365, that allows application users to view all needed data on one unified view.
2. Process flow and task management to allow for the tracking of information coming in through the system accountability.

The D365 Program currently supports or plans to support the following applications/projects. This is not an exhaustive list. The list below may change throughout the life of the task order:

1. Veterans Experience Integration Solution (VEIS)
2. Customer Relationship Management/Unified Desktop Optimization (CRM/UD-O)
3. Veterans Integrated Clinical Contact Center Management System (VICCCMS) (formerly VA Medical Center (VAMC) Contact Center Modernization (VCCM))
4. Patient Advocate Tracking System -Replacement (PATS-R) (Formerly Veterans Experience Feedback Tool (VEFT))
5. Education Call Center (ECC) CRM
6. Community Care (CommCare) (Formerly Purchased Care Non-VA/Call Center Way Forward (PCNV/CCWF))
7. Member Services CRM (also known as Health Resource Center (HRC) and Health Eligibility Center (HEC)
8. Chat Analytics
9. Knowledge Management (KM)/Analytics
10. Enterprise Contact Center Modernization (ECCM)
11. Telehealth Management Platform (TMP) (also known as Clinical Video Telehealth (CVT)/Telehealth Scheduling System (TSS)
12. Veterans Enterprise Management System (VEMS)
13. Federal Case Management Tool (FCMT)/Interagency Coordination Program (ICP)
14. Beneficiary Fiduciary Field System (BFFS)
15. Beneficiary Travel Self-Service System (BTSSS)
16. Financial Service Center / Fraud Case Management (FSC)
17. Provider Profile Management System (PPMS)

18. Office of Accountability and Whistleblower Protection (OAWP) - Matter Tracking System (MTS)
19. Office of Resolution Management (ORM)

The VA is transitioning to development and operations (DevOps) and Scaled Agile Framework (SAFe). DevOps is a culture-based software engineering approach that aims at unifying software development and software operation, and mandates collaboration between the business and the IT organizations that develop, deliver, and manage applications for that business. The new culture will enable project teams to utilize self-service and have more autonomy with the approach used to meet customer needs.

SAFe is a proven approach that will allow VA to deliver solutions to customers faster and efficiently using Lean, Agile and DevOps principles, practices and processes. DevOps will improve the experience of OI&T customers, enable OI&T to deploy new systems and update existing systems more quickly and frequently, and will lower costs by leveraging industry best practices and innovation.

OI&T is looking to adapt Human-centered design (HCD) as part of its D365 development enhancement efforts. HCD is an approach to problem solving, commonly used in design and management frameworks that develops solutions to problems by involving the human perspective in all steps of the problem-solving process. Human involvement typically takes place in observing the problem within context, brainstorming, conceptualizing, developing, and implementing the solution.

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 CMMI) Level 2 procedures and processes
2. National Archives and Records Administration (NARA), “Basic Laws and Authorities”,
3. February 2008 Revision, “Basic Laws and Authorities of the National Archives and Records Administration”, 2006 Edition 42 U.S.C. § 2000d “Title VI of the Civil Rights Act of 1964”
4. VA Memorandum “Updated VA Information Security Rules of Behavior (VAIQ #7823189)”, September 15, 2017
5. 18 F API Standards https://github.com/18F/api-standards
6. WH API Standards https://github.com/WhiteHouse/api-standards
7. The Twelve Factor App https://12factor.net/
8. The Agile Manifesto http://agilemanifesto.org/
9. The U.S. Digital Services Playbook https://playbook.cio.gov/
10. The TechFAR Hub https://techfarhub.cio.gov/

11. VA Digital Services Handbook Research and Discovery Checklist https://department-of-veterans-affairs.github.io/va-digital-service-handbook/delivery/research-and-discovery/checklist
12. The Digital Analytics Program https://digital.gov/dap/
13. VA Design System https://design.va.gov/
14. United States Web Design System https://designsystem.digital.gov/
15. VA Developer Portal https://developer.va.gov/
16. Attachment 1 - DevOps PWS Backlog Table

3.0 SCOPE OF WORK

The Contractor shall provide test-driven software development (Dev) and information-technology operations (Ops) services using the D365 software application to shorten the system development life cycle and provide Continuous Development with high software quality. This software will be used to support/customize/develop D365 applications across the VA enterprise.

The Contractor shall provide product and delivery management, systems architecture, software development, user research, user experience strategy, information architecture, DevOps, integration support, and data analytics via Power BI Tool to build and continuously improve new and existing D365 solutions.

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, 4.2.6 Web Application Design and Development, 4.2.8 Human-Computer Interaction, 4.2.9 System/Software Integration, 4.2.10 Modeling and Simulation, 4.2.12 Engineering and Technical Documentation, 4.3 Software Technology Demonstration and Transition, 4.4 Test & Evaluation (T&E), 4.8 Operations and Maintenance (O&M), 4.9.3 Assessment and Authorization, 4.9.4 Security Operating Support, and 4.10 Training of the T4NG 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.

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 two 12-month option periods. The TO shall include two optional tasks for additional services.

4.2 PLACE OF PERFORMANCE

Efforts under this TO shall be performed at the Contractor's facility.

4.3 TRAVEL OR SPECIAL REQUIREMENTS

The Government anticipates travel to perform the tasks associated with the effort, as well as to attend program-related meetings or conferences throughout the PoP. Travel and per diem shall be in accordance with the Federal Travel Regulations (FTR) and requires advanced concurrence by the Contracting Officer's Representative (COR) with VA Project Manager (PM)'s concurrence. The Contractor shall provide cost estimates with each travel request. Each Contractor invoice must include copies of all receipts that support the travel costs claimed in the invoice. Local travel within a 50-mile radius from the Contractor's normal duty location is considered the cost of doing business and will not be reimbursed. This includes travel, subsistence, and associated labor charges for travel time. Travel performed for personal convenience and daily travel to and from work at the Contractor's facility will not be reimbursed. Travel, subsistence, and associated labor charges for travel time for travel beyond a 50-mile radius of the Contractor's facility are authorized on a case-by-case basis and must be pre-approved by the COR.

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 (i.e. IBM Rational Collaborative Application Lifecycle Management (CALM) Toolset ,hereafter referred to as VA-approved Repository) after Contractor personnel obtain VA network access. These toolsets are used by VA to provide a single Agile product application lifecycle management tool to track project execution details. The Contractor shall work with its respective point of contact, to obtain access to VA Talent Management System (TMS) to take the mandatory training courses. The Contractor shall be provided access to the D365 Cloud Application Environments.

The Contractor will be provided the following Government Furnished Materials/Information/Equipment upon TO 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. VA Repository Tools access (must be requested)
    iii. Primavera/MS Project scheduling tools as mandated at the time of the PoP
c) D365 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 D365 relevant program and project documents
h) National Service Desk (NSD) Service Desk Manager (SDM)

The Government has determined that remote access solutions involving 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. 100 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 MS 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)

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 Risk	Tier 2 / Moderate Risk	Tier 4 / High Risk
5.1	☐	☒	☐
5.2	☐	☐	☒
5.3	☐	☐	☒
5.4	☐	☐	☒
5.5	☐	☐	☒
5.6	☐	☐	☒
5.7	☐	☐	☒
5.8	☐	☒	☐

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.

4.7 Key Personnel

The Contractor shall provide expertise in one or more of the following areas: SAFe Agile software development life cycle (SDLC), product and delivery management, systems architecture, software development, systems reliability engineering, user research, user experience (UX) strategy, user interface (UI) and visual design, static and dynamic content management, and DevOps. The Contractor shall provide certifications to ensure qualifications of personnel.

5.0 SPECIFIC TASKS AND DELIVERABLES

The Contractor shall support the maturation and transition of D365 products from the current state to SAFe Agile and DevOps. The Contractor shall follow mature SAFe Agile processes and implement, in conjunction with the Government, any processes and best practices to provide new, test-based development, as well as adaptive, perfective, preventive, and corrective maintenance while delivering working software.

The Contractor shall incorporate modern user research and usability testing best practices into all solutions. The Contractor shall design, develop, configure, customize, deploy, and operate solutions. Once deployed, the Contractor shall provide production support of the solution as required, including limited user support.

The Contractor shall deliver modern digital services that use the SAFe DevOps Continuous Delivery Pipeline which includes continuous integration, continuous deployment, and release on demand. In the future state, the Contractor shall deliver secure and tested D365 designs using automated testing frameworks.

The Contractor shall incorporate Agile methodology and iteration ceremonies into all work to include, at a minimum, sprint planning, daily scrum, sprint review, sprint retrospective, backlog grooming, and estimating activities. The Contractor shall also use DevOps techniques of continuous integration and continuous deployment across all environments including, at a minimum, development, staging and production.

All tools used in the maintenance of the D365 application and related applications must be approved in the Technical Reference Manual (TRM). Deviations from this will require a waiver from the TRM group. Request for exceptions or deviations cannot impact delivery. All tools used in the environments of the D365 and related programs and all applications produced by D365 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 VA'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/orders and with other VA offices/activities.

All releases into the production environment shall comply with VA's release processes.

The Contractor shall, with VA concurrence, perform Product Backlog Refinement and prioritization throughout the product life cycle and as required by Agile process.

The foundational structure for VA Agile development and project/product line management can be found in the latest VA product management guide. For delivery of all project artifacts, the Contractor shall utilize the approved repository for managing project execution details and for the management and storage of artifacts using approved EPMO website templates.

The Contractor shall utilize VA-approved templates. When no VA 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 COR prior to 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 PM/Product Owner (PO), and/or COR for approval.

The D365 Program is constantly evolving to intake new applications that will require DevOps support to meet VA priorities. The team size required to provide the DevOps support identified in this section for each application shall be determined by VA based on its intake analysis. The Contractor shall have available to VA ten categories (5 core and 5 non-core) of team sizes to perform the DevOps requirements as needed for each application. A core application requires support 24x7/365. A non-core application requires support from 6:00 AM to 10:00 PM EST, Monday through Friday except for Federal holidays. The required dedicated full-time employee (FTE) count for each team size (core and non-core) are as follows:

Required Team Sizes	Core Application Dedicated FTEs per Team	Non-Core Application Dedicated FTEs per Team
Extra-Small (XS)	1-2	1-2
Small (S)	3-4	3-4
Medium (M)	5-6	4-5
Large (L)	7-8	5-6
Extra-Large (XL)	9-11	7-9

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 PM/PO approved CPMP throughout the PoP.

The CPMP shall describe the technical approach, timelines, organizational resources, and management controls being employed to meet the schedule and performance requirements as defined in this 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 Build Test Plan (See Section 5.2.2.3) will be based. The Contractor shall describe the overall approach to QA activities for the project. 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.

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 shall 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 a VA approved repository to provide a single Agile product lifecycle management tool to track execution details. The product Data and Artifact Repository shall be used to provide a single authoritative product data source and artifact repository. All OI&T project data and artifacts shall be required to be managed in the repository on a daily basis. All checked out artifacts shall be checked back in before the end of each business day.

The Contractor shall use a VA approved repository tool 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 the repository tool 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 Repository tool and/or Traceability Matrix.

5.1.2.2 PRODUCT STATUS REPORT

The Contractor shall deliver Monthly Product Status Reports detailing the status of all work efforts, to include risk, Agile metrics (as it relates to burn down, story points, and team velocity), blockers, schedule, user volume, and issues. This list is not all-inclusive. These reports shall provide accurate, timely, and complete project information.

These reports shall not be the only means of communication between the Contractor, COR and the VA PM/PO 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 Monthly Product Status Report to the COR and VA PM/PO during routine, regular communications.

Deliverable:

A. Monthly Product Status Report

5.1.3 RATIONAL TOOLS TRAINING

Contractors that require access to the Rational Tools suite shall complete the following VA TMS training courses within 14 days of the identification of the access need. The Contractor shall work with their respective point of contact, to obtain access to 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:

A. Rational Training Certificates (if using Rational)

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”.

Contractors who have completed these VA training courses within the past 12 months and have furnished certificates will not be required to re-take the training courses. The training referenced above is required to be renewed annually. The Contractor shall submit status of VA Privacy and Information Security Awareness training for all individuals engaged on the task.

Deliverables:

A. VA Privacy and Information Security Awareness/Rules of Behavior Certificate, Health Insurance Portability and Accountability Act Certificate, Signed Rules of Behavior

5.1.5 TECHNICAL KICKOFF MEETING

A technical kickoff meeting shall be held within 10 days after TO award. The Contractor shall coordinate the date, time and location (can be virtual) with the Contracting Officer (CO), as the Post-Award Conference Chairperson, the VA PM, as the Co-Chairperson, the Contract Specialist (CS), and the Contracting Officer Representative (COR). The Contractor shall provide a draft Technical Kickoff Meeting Agenda to the CO, COR and VA PM at least five calendar days prior to the meeting. Upon Government approval of a final agenda, the Contractor shall distribute the agenda and Presentation Materials to all meeting attendees. During the technical kickoff-meeting, the Contractor shall present, for review and approval by the Government, the details of the intended approach, work plan and project schedule for the effort via a MS Office PowerPoint presentation. At the conclusion of the meeting, the Contractor shall update the presentation with a final slide entitled "Summary Report" which shall include notes on any major issues, agreements, or disagreements discussed during the technical kickoff meeting and the following statement "As the Post-Award Conference Chairperson, I have reviewed the entirety of this presentation and assert that it is an accurate representation and summary of the discussions held during the Technical Kickoff Meeting for the Government MS D365 DevOps." The Contractor shall submit the final updated Presentation Materials to the CO for review and signature within three calendar days after the meeting. The Contractor shall also work with the CS, the Government's designated note taker, to prepare and distribute the Technical Kickoff Meeting Minutes of the kickoff meeting to the CO, COR and all attendees within three calendar days after the meeting. The Contractor shall obtain concurrence from the CS on the content of the meeting minutes prior to distribution of the document.

5.1.6 ONBOARDING

The Contractor shall manage the onboarding of its 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 who may require elevated privileges to the necessary development and test environments for the various systems to be enhanced. After review between the Contractor and COR, a decision will be made as to the necessity of obtaining GFE for the onboarding staff. If approved, the Contractor shall follow the appropriate steps to obtain the equipment.

A single Contractor Onboarding point of contact (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 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 the weekly onboarding status meetings. The Contractor shall provide an Onboarding

Status Report weekly for any staff with outstanding onboarding requests for review by the COR and VA PM/PO.

Deliverable:

A. Weekly Onboarding Status Report

5.1.7 SCHEDULE MANAGEMENT

The Contractor shall create, maintain, analyze, and provide a Program Integrated Master Schedule (IMS) at a minimum once a week. This shall include the integrated individual project schedules (in Portable Document Format (PDF) and MS Project format) which shall report on a minimum of five Work Breakdown Structure levels for their activities. A schedule shall be developed / reviewed / revised for each sprint and build through the length of the project. It is expected that the sprints and builds within the project schedule will vary in level of detail (i.e., the near-term sprints should include detail to the user story level and sprints/builds further out should include planned features but not necessarily to the user story level).

Deliverable:

A. Program Integrated Master Schedule

5.1.8 RISK MANAGEMENT

The Contractor shall conduct risk management of all work performed under this TO and provide input to a Risk Management registry within the repository 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/PO via email within 24 hours. Email subject line shall read “{Project Name} Risk Alert Notification”
4. Provide the COR and VA PM/PO a Weekly Risk Management Status 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 Project Level Configuration Management (CM) Plan

which meets Product CM plan requirements. The Contractor shall reflect all CM required activities and standards in each project-level CM plan while 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 CM Plan. The Contractor shall identify types of configuration items pertaining to each product to be placed under configuration management. Based on Product 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 a VA approved tool and repository for all software source code and electronic artifact configuration and version management. The Contractor shall use the repository 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 VA repository 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 change control board requirements.
6. Establish and maintain status reporting on change and configuration management activity and ensure VA repository data records and artifacts are filed and updated daily.
7. Update the existing Project Level Configuration Management Plan.
8. Schedule Change Control Board (CCB) meetings, prepare agendas and distribute meeting materials under the COR and VA PM/PO'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.
9. Provide Configuration Management support in the governance, process, roles, and responsibilities for the intake, disposition, and documentation of configuration and/or code changes in support of applications that have been deployed to production.

Deliverable:

A. Project Level Configuration Management Plan

5.2 SOFTWARE DEVELOPMENT LIFECYCLE

The Contractor shall follow the Scaled Agile Framework (SAFe) methodology as described below and industry SAFe standards. The Contractor shall follow SAFe agile, test-driven development (TDD) methodology to provide systems and software engineering, web services development, and software release and change management services. The Contractor shall continuously improve all new and existing D365 applications by implementing continual enhancements, bug fixes, monitoring, testing and evaluation, analytics, and support activities, while collaborating closely with the D365 and VA Project teams throughout the development

process. The Contractor shall configure, develop, maintain, test, and deploy D365 maintenance releases and/or bug fix/hotfix releases. Scrum teams for this effort shall be composed of an evolving mix of technical and operational 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 repository tool updates to match the nature of the software product.

5.2.1 AGILE REQUIREMENTS ELABORATION

The Contractor shall complete backlog grooming sessions 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 (SMEs). The Contactor shall provide an agenda and minutes for each requirement gathering session to the VA PM/PO as well as the participants. The outcome of these sessions shall be a complete review of, and agreement to, the user stories, including user stories added as a result of backlog grooming by decomposing epics into stakeholder needs, business requirements, business rules, requirements visualizations, user story elaborations, and acceptance criteria. Product backlog grooming and prioritization are continued throughout the product life cycle and shall be ~~f~~acilitated by the Contractor.

The Contractor shall:

1. Ensure all products in the pipeline are included and executed as appropriate within the overall Agile backlog grooming effort.
2. Populate the backlog during planning sessions identifying all features the team considers relevant to 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 or VA-approved tool, 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 the approved repository. 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. 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 D365 best practice recommended by the D365 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 D365 enterprise governance.

9. Update the VA Repository 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 the VA Repository 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 the VA Repository.

Deliverable:

A. Requirements Package
B. Ranked Product Backlog Report

5.2.2 HUMAN CENTERED DESIGN (HCD)

The Contractor shall follow the United States Digital Service value: “Design with users, not for them.” The Contractor shall create and maintain documentation for all research and design activities and decisions.

The Contractor shall:

1. Conduct user research on the D365 applications to continually improve the user experience and to learn how new or updated features/flows will improve usability. The Contractor shall iteratively apply insights gathered to inform design and development. The Contractor shall create a Global User Experience Research Plan and Global User Experience Research Summary for each D365 application, which shall include a write-up documenting research questions, hypotheses, methodology, synthesis, and next steps.
2. Conduct generative research studies to better understand users’ needs, context, and pain points.
3. Conduct iterative usability testing to inform the content, information architecture, design, and functionality of D365 applications.
4. Craft, test, deliver, deploy and release Global User Experience Design Documents, to include wireframes, low- and high-fidelity prototypes, or interactive web forms to facilitate usability testing and agile development of D365 applications.
5. As appropriate, create and update prototypes to conduct facilitated demos or usability testing to elicit feedback for improvements to the design.

Deliverables:

A. Global User Experience Research Plan
B. Global User Experience Research Summary
C. Global User Experience Design Documents

5.2.2.1 SOLUTION ARCHITECTURE PLANNING AND EXECUTION

The Contractor shall create a Solution Architecture Package that includes the business, systems, application, and data architectures for the new features and capabilities using an architecture framework, to be approved by the VA PM/PO/COR for each 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/PO. The Contractor shall also outline any 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 Repository Tools.
4. Develop a prioritized backlog of architectural/platform requirements.
5. Create and maintain enterprise architecture and designs in an iterative manner over the course of sprints and release.
6. Leverage and reuse the D365 architecture framework and platform information in the development of the architecture. Design D365 software components and code patterns which foster reusability and enterprise capabilities.

Deliverable:

A. Solution Architecture Package

5.2.2.2 INTEGRATION AND PARTNER MANAGEMENT

D365 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 efforts. The D365 applications are highly integrated systems and each data exchange is treated separately, point to point.

The Contractor shall:

1. Develop a Partner Integration Strategy Plan on how D365 applications can integrate with and consume services provided by partners, as well as share data with other VA applications per backlog requirements. The Partner Integration Strategy 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 D365 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 D365 project schedules and critical partner integration points.
6. Manage partner outage awareness and communication by ensuring partners are aware of schedule alignment, trigger dates, and due dates. Communicate partner outages and the impacts to D365 applications up time and user satisfaction, perform resolution, corrective and preventive actions as necessary and notify stakeholders of actions completed and any impact to applications.
7. Manage data across environments including staging of data and data used for both scenario testing, validation and demonstrations.
8. Update the existing Partner Coordination and Communication Plan which details partner integration activities and includes a partner list with current contact information. Partner information shall be updated monthly.
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 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 schedule with 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 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 D365 Chat and KM software through VA Trusted Internet Connection (TIC), VPN or CAG.
15. Support the D365 cloud server providers' maintenance of the existing connection between VA Self Service Portals and D365 cloud by serving as a SME on troubleshooting calls and analyzing application logs when required.

Deliverable:

A. Partner Integration Strategy Plan

5.2.2.3 BUILD/PROGRAM INCREMENT (PI) PLANNING

Backlog grooming and prioritization are continued throughout the product life cycle and shall be managed throughout the PoP. Builds shall be built in three-month cycles or less. The Contractor shall develop and deliver a Build Plan/Roadmap for each Agile Release Train (ART) in collaboration with the project team prior to beginning the build. The Build Plan/Roadmap is the scope of work which will be completed in the agreed upon build/PI timeframe. Each build shall deliver at least one new release or push to production, unless otherwise specified by the VA PM/PO. Each build shall be delivered in three months or less 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/Roadmap must be completed prior to the start of the three-month build/PI timeframe. Conclusion of the Build Planning phase shall be defined per the agreements made with the VA PM/PO. After the Build Plan/Roadmap is approved and the team is ready to start the build, the three 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 a VA approved repository. All activity scheduled in each build and backlogs shall be captured and have status showing all work items, changes, impediments, and retrospectives. All data and artifacts in the repository 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/PO and project team. This backlog grooming shall occur continuously throughout the build to ensure the highest product priorities are being met. Meeting agendas, materials and minutes shall be distributed. 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 the repository based on the outcome of the change and configuration management processes. This includes revision of the functional and technical requirements and user stories in the repository 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 the repository.

2. Coordinate and facilitate quarterly PI Planning sessions in collaboration with the VA PM/PO, business stakeholders, and project teams to drive the selection of prioritized items from the product backlog to be included in the next build/PI with direct input by the line of business and with approval by the VA PM/PO. The approved items will be incorporated into the Build Plan/Roadmap for posting to the repository.
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. Develop, coordinate and validate Interconnection Security Agreement/Memorandum of Understanding (ISA/MOU) and Service Level Agreements (SLAs) 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/PO 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. capacity, load, performance, installation, back-out, and rollback) in the Build Test Plan. The Contractor shall populate its Test Strategy section of the Build Test Plan in the repository tool within 15 days of the completion of the Build Plan/Roadmap. System Assurance, including testing of software code, shall be documented in the Build Test 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. The Release Planning Package can consist of the following documents: Disaster Recovery Plan, Implementation Plan, Backout and Recovery Plan, and Technical Release Notes.

Deliverable:

A. Build Plan/Roadmap
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 the Repository Tool shall be fully linked to requirements data and test data. The Contractor shall:

1. Create and prioritize the sprint backlog based on the approved, prioritized items identified during build planning with the Business/PO.
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 the Repository to include any additional requirement elaboration details developed during this process.
5. Determine the testing events required for the Sprint.
6. Update requirements traceability in the Repository 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 shall be tailored to the scope of the sprint and shall include sprint backlog, sprint design, sprint schedule, sprint acceptance criteria and sprint test events. The Sprint Plan shall be approved by the VA PM/PO prior to the start of sprint execution.

Deliverable:

A. Sprint Plan

5.2.2.5 SPRINT EXECUTION

The Contractor shall:

1. 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, including Source Code, as work items in the Repository that were established in the Sprint Plan.
2. Participate in daily scrums (typically 15 minutes) to discuss the team's progress, impediments and daily plans.
3. Provide Daily Updates, to include progress on tasks during sprints, blockers and dependencies.
4. 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.
5. Obtain official Customer Acceptance of the sprint.
6. Initiate and participate in 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 the Repository. This shall include all project artifacts such as work items, changes, risks, issues, impediments, and retrospectives. All data and artifacts in the Repository 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 Project Level CM Plan.

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

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.

Deliverables:

A. Sprint Burn Down Charts
B. Velocity Charts

5.2.3 TESTING

The Contractor shall follow SAFe agile, TDD methodology to provide sprint and build testing for D365 applications. The Contractor shall conduct sprint and build testing as follows:

Sprint and Build Testing

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

The Contractor shall provide a Build Test Plan (identified in 5.2.2.3) following the templates and data requirements for each test appropriate to each phase of development. The Contractor shall provide Test Results in the approved repository which is the final piece of data that completes the Requirements Traceability Matrix (RTM). The Contractor shall create automated test scripts, conduct testing (to include, at a minimum, unit, development, performance, security, Section 508, functional and integration) and document results in the Test Report.

The Contractor shall provide technical support for 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, Web Application Security Assessment (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 Build Test Plan. The testing and compliance results must be

entered and maintained in the Repository and under version control. The Contractor shall ensure that results of all assessments of the project performed by the Contractor or by VA offices are consolidated into the Repository for planning and status reporting.

When a defect is identified during testing, the Contractor shall log it in a VA approved Repository, selecting the appropriate severity level. The Contractor shall provide 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 project team and approved by the VA PM/PO. Based on the priority, the defect could be entered into the current sprint or entered into the backlog.

The Contractor shall ensure the Repository data is updated daily so VA stakeholders can access accurate and timely status.

Build Assembly and Testing

The Contractor shall assemble completed sprints into builds and support testing for 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 to include, at a minimum, the following:
    a. Product component testing
    b. Component integration and system testing
    c. Quality assurance testing
    d. User functionality testing
    e. Performance/load testing

The Contractor shall support testing during the Build phase and ensure that new sprint functionality works together in the event the build is determined to be a release candidate. The Contractor shall support all build testing events to explain functionality that was developed during the build, track defects found during build testing, and 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 VAin obtaining the 508 compliance testing certifications for each build 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) and Product Readiness Reviews (PRRs) with product demonstrations throughout the build.

The Contractor shall document and deliver to the VA PM/PO the TRR and PRR Review Meeting Minutes.

Following successful build testing, the Contractor shall make final, formal delivery of Final Development Code Files, Compiled Code, and Supporting Documentation.

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, VA PM/PO and COR approval.

The Contactor shall provide maintenance testing support services as part of the support for D365. The D365 maintenance testing services shall include all end-to-end testing which provides tested code prior to UAT.

5.2.4 RELEASE AND DEPLOYMENT

5.2.4.1 PRE-RELEASE SUPPORT

The VA Release Process is conducted during the build cycle. The Contractor shall support OI&T's single VA Release process.

The Contractor shall use the VA release calendaring process and tool to track software installations, hardware replacements, system upgrades, patch releases and implementations, special works in progress, and other deployments in any VA production environment. The Contractor shall provide data for populating and updating the VA release calendaring process for each release and deployment.
The Contractor shall work with the PM/PO and stakeholders to develop a Build Release Package that will outline processes and documentation needed to deploy the build.

To complete and deliver 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. Develop and maintain the Version Description Document which is used to identify, maintain, enhance, and recreate the product (IT asset) throughout its lifecycle.
4. 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 VA release requirements.
5. Provide all documentation required to obtain/maintain an ATO as specified in the EPMO Website.
6. Ensure each Build's final source code is appropriately stored in the Repository Tools

Deliverable:

A. Build Release Package

5.2.4.2 RELEASE AND DEPLOYMENT SUPPORT

Successful completion of deployment requires that the build has received the required approvals and authorizations.

The Contractor shall coordinate each release with the VA technical staff and any development and integration teams of any systems that are interfaced and shall resolve issues and ensure that migration is completed as planned to the proper technical environments. Close coordination with the Release Team is required to ensure that Production Releases meet certain standards for successful deployment.

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 in close coordination with the D365 Hosting provider and Developer as necessary. 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 for each release as needed, following guidance from the VA Release Process. 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 5.3.6.

The Contractor shall:

1. Support all build deployments for D365 applications.
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.

The Contractor shall produce and deliver a Release and Deployment Package which includes updated and final technical documentation reflecting any changes occurring during the planned release:

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, and Back-out Guide for quick diagnosis of operational problems. The Contractor shall also include a Deployment Guide with instructions on how to deploy each component, inclusive of component relationship diagrams.
3. Updated Technical Documentation Package, including updates to the existing System Design Document, materials, manuals, user guides, and release notes and make a final, formal delivery to VA. If any discrepancies are found, the Contractor shall be responsible for resolution.
4. Technical Manual 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 that describe changes to existing software and new features and functions created as a result of this build.

Following successful completion of a planned deployment, shall update and finalize the software source code and make a final, formal delivery to VA. Corrective maintenance stories do not qualify as formal delivery of a build.

Deliverables:

A. Release and Deployment Package
B. Final Software Source Code

5.2.4.3 SOLUTION TRAINING

The Contractor shall provide training to VA staff in the utilization and operations and maintenance (O&M) of D365 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 an End-User Training Package which consists of an End-User Training plan, Facilitator's Guide, Users Guide, PowerPoint slides, job aids and exercises.
2. Perform on-site, hands-on training with designated application end-users (i.e., train-the-trainer), (not to exceed a total of 25 users) prior to pilot and national deployment roll-out of the D365 solutions for production. Training deliverables shall be provided electronically; however, for the onsite, hands-on training sessions, hand-out copies of the Facilitator's Guide, Users Guide and PowerPoint slides are occasionally requested. In these cases, the Contractor is expected to print the hand-outs accordingly. Provide minutes of training session to include a list of attendees and time attended.
3. 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.

4. Perform hands-on training with VA Help Desk personnel (not to exceed a total of 15 users) prior to the delivery of D365 builds for production. Provide minutes of training sessions to include a list of attendees, and time attended.
5. Perform hands-on training with System Administrators/Operations staff (not to exceed a total of 15 users) prior to the delivery of D365 builds for production. Provide minutes of training sessions to include a list of attendees and time attended.
6. Maintaining the existing Developer's Guide.
7. Create and maintain On-line Help artifacts and scripts in a government hosted repository for Help Desk staff, IT staff, and end-users.
8. Participate in the VIP Formal Product Documentation Reviews.

Deliverables:

A. Help Desk Training Package
B. End-User Training Package

5.2.5 D365 INTEGRATION SUPPORT

The Contractor shall be responsible for planning and overseeing integrations across each task as well as developing reusable code components/web parts to be consumed by other D365 platform applications. The Contractor shall develop and publish APIs to support product needs working with external customers.

The Contractor shall provide technical support on integrations and interfaces across the D365 Platform applications; many of which are currently in place or in progress and others that will be required in the future. As there are dependencies on web service providers and other groups within VA that are external to the D365 Program, it has historically been a challenge to provide sufficient planning and lead time in terms of identifying future integration requirements, submitting web service/interface requests to external groups, developing reusable D365 code components/web parts to consume web services, receiving web services from external groups, and implementing integrations in Production within the planned Build timeframes; hence, the need for a dedicated D365 Integration Team to oversee and plan for integrations across each task as well as developing reusable code components/web parts to be consumed by other D365 platform applications. The Integration Team shall be capable of developing both web and non-web-based interfaces and deliver reusable code components/web parts. It is estimated roughly two to six D365 interfaces will be ongoing at a time and OIT will provide a prioritized list of these interfaces. The Integration Team shall consist of dedicated, full time members necessary to complete the task. Typical roles of the team usually consist of any of the following roles: a Scrum Master to run/oversee the Integration Team, Quality Assurance Analyst and Tester, Business Analyst that can elaborate interface requirements as needed, and a dedicated Developer. The Developers assigned to the individual development tasks will be required to provide input to the Integration Team on a regular basis. At least one member of the Integration Team shall possess expertise and experience with multi/omni-channel product implementations (i.e., computer telephony integration (CTI), chat, email, etc.) with Microsoft Dynamics D365.

Deliverable:

A. Reusable Code Components/Web Parts

5.3 OPERATIONS AND MAINTENANCE SUPPORT

5.3.1 ENTERPRISE SECURITY CHANGE CONTROL BOARD (ESCCB) AND NETWORK SECURITY OPERATIONS CENTER (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 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, the Contractor shall open a VA NSOC NSD Help Desk Ticket 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 two-three times 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 ISA and supporting 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 assistance to the VA tester, 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 WASA checklist when VA applications hosted in an external environment require their application to be publicly accessible on the Internet or if required by the Assessment & Authorization (A&A)/ 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.

5.3.2 OPERATIONS AND MAINTENANCE SUPPORT

The Contract shall perform system solution O&M support activities by supporting the application from desktop to server, real time monitoring system performance metrics, and coordinating with other VA and non-VA systems. The system solution O&M support activities are related to the ongoing support for the performance of routine, preventive, predictive, scheduled, and unscheduled actions aimed at maintaining the application's system performance. The Contractor shall properly size and deploy capabilities to support performance, provide performance monitoring and bug fixes, and work with the hosting and development staff to prevent system/production failure. In addition, the Contractor shall provide O&M support activities to 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.

The Contractor shall provide technical documentation and execute life cycle processes throughout the PoP to support the delivery of D365 functionality. Releases may occur after hours and/or on during the weekend. It is expected that all deployment release packages are complete and SME troubleshooting support is provided. For Production releases, Contractor support staff shall be identified and be available to provide technical support on problems, in accordance with the Severity Table in PWS 5.3.6.

5.3.3 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 D365 Users List Report, utilizing current user lists, to VA of all active and deactivated Users as changes are made.
3. Manage all D365 users and credentials in the production related D365 environments including non-production and production.

Deliverable:

A. D365 Users List Report

5.3.4 DATABASE ADMINISTRATION SUPPORT

The Contractor shall provide database administration for all the D365 applications that are hosted in the D365 Hosting cloud. As part of database administration support, the Contractor shall:

1. Install, manage, and maintain MS Structured Query Language (SQL) service instances for all D365 projects.

2. Create new databases for the production environments.
3. Perform daily backup and restore databases as required.
4. Create database-level accounts needed for D365 Organizations.
5. Manage database permissions.
6. Troubleshoot back-end database issues.
7. Document bug and errors in RTC and provide Bug and Error Reports which lists all identified defects and remediate as necessary.
8. Ensure proper SQL Service licensing is applied to the D365 instances.
9. Support, configure and administer MS SQL Server Reporting Services.
10. Support, administer and configure KM and Chat 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 of the above activities.

Deliverables:

A. Bug and Error Report
B. Database Maintenance Log

5.3.5 OPERATIONAL SUPPORT

The Contractor shall support routine operations from 6:00 AM to 10:00 PM EST, Monday through Friday, except Federal holidays, for Non-Core applications. The Contractor shall provide 24 hours x 7 days x 365-days per year (24x7x365) support and applications monitoring for Core applications. The Contractor shall support applications in the FISMA moderate and/or FISMA High environment and/or shall ensure the use of FedRAMP-defined controls and processes in accordance with VA's current FISMA ratings. The Contractor shall also be required to provide on-call 24x7x365 operations support for emergency maintenance requirements for the None-Core applications for Severity 1 production incidents. The Contractor shall:

1. Use the following toolsets for O&M support:
   a) VA Provided GFE
   b) NSD SDM – VA will provide access to SDM.
   c) D365 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) VA Repository Tools access - 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 the 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 VA Repository.
7. Develop Root Cause Analyses Reports 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 Defects, National Service Desk (NSD) Tickets and D365 Cloud Tickets Report for each D365 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:

    a) Provide a Sustainment Bug Fix/Hot Fix Release Package in the Repository, consisting of the following artifacts as currently required by the VA Release Readiness Office. Upload the following into Change and Configuration Management (CCM) > Source Control > Documentation Stream in VA-approved repository:
        I. Version Description Document
        II. Defect Log
        III. Updated Installation/Back-Out/Rollback Plan
        IV. 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.
        V. 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 D365 Security Team in order to update A&A documentation as required to maintain the hosting and application ATOs).

    b) Meet the Severity Level task requirements as outlined in the table below.

    c) Provide Incident, Problem, Event Management Reports with the following metrics:
        I. Defect Backlog - Quantity closed, reassigned, revised, and those remaining open from the defect backlog assumed at completion of the phase-in transition
        II. 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.

III. 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 four sustainment bug fix/hot fix releases per application per year in addition to the resolution requirements in the Severity Levels table below.

Severity Levels (Production defects)

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 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	**Notification to VA:** 1. Respond within 1 hour of discovery during business hours (6:00 AM to 10:00 PM EST) 2. Analyze and correct the issue, documenting Root Cause Analysis (RCA) and 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. 4. 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

	• Defect has potential for Adverse Department publicity • Defect has potential to cause a VAMC / VISN telephone triage patient care call center work stoppage	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 a team of resources working 24/7 until resolution. Resolution will result in an emergency release.
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 6:00 AM to 10:00 PM EST. 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 but no longer than 3 business days, with a team of 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 in accordance with the resolution timeframe. Examples are: 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	**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 3 defects shall be addressed within 6 months or less of TO 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 TO award. Hereafter, any new Severity 4 defects shall be resolved and included in a bug fix/hotfix release on a quarterly basis.

Priority Levels (Lower/Non-Production environment defects)

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.

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.

The Contractor shall provide status updates each time the status of a ticket changes within 24 hours of the change.

Deliverables:

A. Root Cause Analysis Report
B. After Action Report
C. Monthly Defects, National Service Desk (NSD) Tickets and D365 Cloud Tickets Report
D. Incident, Problem, Event Management Reports

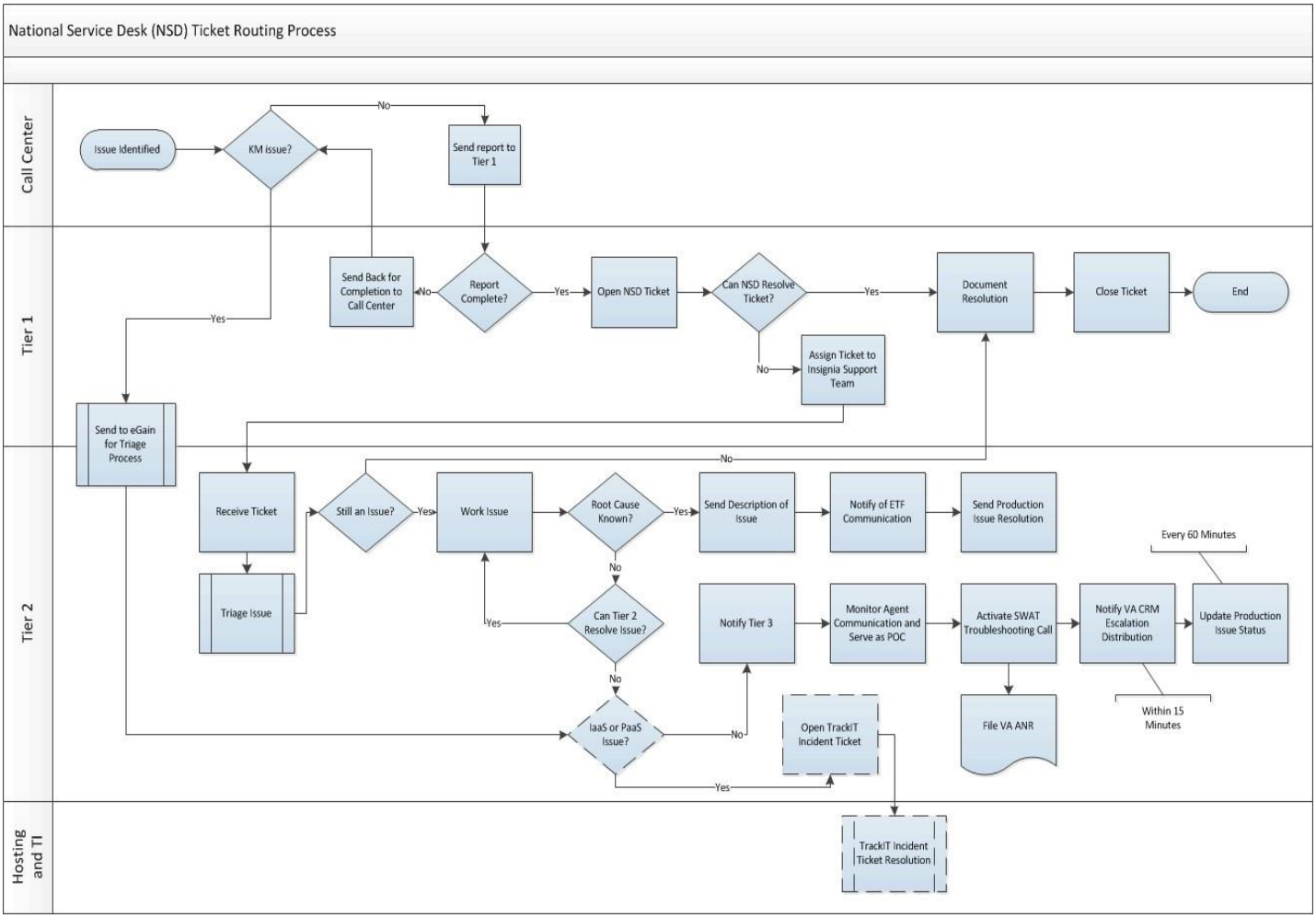
5.3.6 SERVICE DESK SUPPORT

The Service Desk is a component of the overall Production Incident Escalation Communication process. User support calls are initially sent to the VA NSD, which is responsible for Tier 1 support within the D365 Production Incident Escalation Communication process. VA NSD uses the 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 D365 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 5.3.7.1.
2. Respond to all issues that the VA NSD identifies as Tier 3 or Tier 4 D365 issues. Tier 3 and Tier 4 support is described in Paragraph 5.3.7.2 below.
3. Support the Service Desk from 6:00 AM to 10:00 PM EST, Monday through Friday except for federal holidays for Non-core applications, and support 24x7x365 for Core 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.



Incident Reporting and Notification Process Flow

5. Utilize and update, as needed, the existing Production Incident Escalation Communication Plan to update the existing overarching Communication Plan for D365 Help Desk Support. This 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 D365 end users to obtain more information and provide workarounds or one-on-one training support.
7. Work with the applicable Core/Non-Core Teams 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 Customer	Resolution Goal
1 – Critical	Production System Unavailable	0-15 minutes	0-2 business hours
2 – Major	Production System 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		

5.3.6.1 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 incident 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 D365 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 D365 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.

The Contractor providing Tier 2 Support is the only level to have initial or follow up contact with the customer for customer management support.

5.3.6.2 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 D365 Site Operation Teams using the SDM system, program log, and during daily communication. The Contractor shall ensure that the D365 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 D365 Site Operation Teams. The Contractor shall work with D365 Site Operations Support Team members which currently includes a D365 Lead Engineer; an Operations Support Team; an Information Assurance Team; and the D365 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.
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 D365 Team, a Tier 3 D365 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 D365 Defect Management Team if the problem is isolated to a defect in the application software (as the incident then becomes the responsibility of the D365 Defect Management Team.) The D365 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 D365 performance and functionality. The Contractor shall utilize analysis and monitoring tools to configure, automate, monitor, alert and provide remediation recommendations of the D365 Tier 3 and Tier 4 issues. This support shall include:
    a) Analysis and interpretation of D365 software application real time performance metrics.
    b) Analysis and interpretation of D365 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.
    f) Coordination and collaboration with VA entities (i.e. ITOPS) needed to monitor, troubleshoot and support any incidents related to performance issues/incidents.

TABLE 1: RESPONSE TIMES FOR TIER 2 AND TIER 3

Severity Code	Tier 2 Initial Response to Customer	Tier 2 escalates to Tier 3 for initial contact	Tier 3 response to Tier 2	Tier 2 requests updates from Tier 3 based on SLA resolution	Resolution Time based on SLA from time incident initially reported
1 – Critical	15 minutes	0-15 minutes	15 minutes	On call until issue resolved or hourly status check	0-2 business hours

2 – Serious	1 hour	30 minutes	1 hour	On call until issue resolved or hourly status check	2-4 business hours
3 – Moderate	4 hours	1 hour	4 hours	Daily	4-8 business hours

Deliverables:

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

5.3.6.3 SERVICE DESK DOCUMENTATION AND REPORTING

The Contractor shall:

1. Report all Service Desk issues identified as critical issues to the COR within 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 issue 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.

Deliverables:

A. Detailed Outage Reports

B. Service Desk Monthly Progress Reports

5.3.7 TECHNICAL SUPPORT

The Contractor shall:

1. Participate, facilitate, and document design proposal impact due to maintenance work and attend change management meetings. Historically, there are one to three change management meetings monthly.
2. 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). Historically, there are one to three design requirement meetings monthly.
4. Facilitate technical meeting(s) with VA business users and technical staff supplying analysis regarding 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). Historically, there are one to three design concept review meetings monthly.
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 D365 interfaces.

5.4 BASE PERIOD REQUIREMENT

5.4.1 DEVOPS SUPPORT – PLATFORM TEAM

The Contractor shall perform all tasks required by Section 5.1-5.3, including all subtasks, of this PWS. Specifically, the Contractor shall provide one Medium Non-Core Team (referred to as the Platform Team) to support all the services and deliverables for overarching management of work on Government D365 products. The Platform Team shall serve as the overarching support for the portfolio. The Platform Team shall guide the scrum level activities as well as collaboratively engage with the other Core and Non-Core Teams to manage the development and operations of D365 applications. The Platform Team shall provide the following type functions and expertise: Release Train Engineering, Operations Engineering, Security Engineering, System Architecture, and Lead Business Analysis.

5.4.2 TECH REFRESH

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

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.

5.4.3 COTS SOFTWARE PATCHES

The Contractor shall provide technical support to the D365 Cloud Hosting Team in order to deploy COTS software patches (i.e., to D365, 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.

5.4.4 CLOUD ACTIVITIES REQUIRING ELEVATED RIGHTS

The Contractor shall serve as the administrator of all D365 cloud environments, currently but not limited to federal cloud computing environs (VA Enterprise Cloud – VAEC environments), Government D365 software, and integration hub(s). In this role, the Contractor shall coordinate with all necessary and appropriate VA and external resources assigned to assist in management and servicing of these cloud environs for D365 products and applications.

Software as a Service (SaaS) – Government D365 software
The Contractor shall serve as the system administrator for five environments (Dev, Int, QA, PreProd, and Prod) for each D365 application in both a global and service role. Within the scope of these roles, the Contractor shall:

1. Function as the Office 365 Administrator maintaining all functions necessary for D365 Portal deployment, SharePoint integration deployment, and unique D365 email mailboxes established for dedicated queueing of application messaging. These separate D365 email address / mailbox approval exist as ongoing entities.
2. Function as Dynamics 365 Service Administrator providing tenant level administration for the platform and provisioning licenses for system access.
   a) As the Dynamics 365 tenant level administration, the Contractor shall manage all VA D365 instances from the Dynamics 365 Admin Center.
   b) The Contractor shall fulfill all D365 Instance Provisions Requests at the application Level inclusive of initial configuration of the VA D365 Instances from the VA Subscription (e.g. application “xyz” needs Dev, Int, QA, PreProd, and Prod instances provisioned). Any software developers, and O&M support teams maintaining D365 applications and products are provisioned as instance System Admins.
   c) The Contractor shall fulfill all the D365 User Provisions Requests at the application level to:

i. Assign D365 Licenses by adding and/or removing VA Users to/from the respective VA Active Directory (VA AD) groups for License Administration.
ii. Manage D365 Instance Access by adding and/or removing VA Users to/from the respective VA AD groups for D365 Instance Security Administration

d) Function as VA Dynamics 365 Instance Administrator providing Dynamics 365 application administration at the application level.

Platform as a Service (PaaS) – Integration Hub(s)
The Contractor shall serve as the Administrator for VA's subscriptions to virtual Prod and Non-Prod environments used for integration functions and Application Programming Interface (API) development for D365 applications and products. The Contractor shall provide both:

1. Management of scheduled releases enacting configuration changes to D365 applications (e.g. need to scale out/up capacity and adjust app-specific settings) and application deployments (e.g. initial deployment and hotfixes).
2. Management of monitoring integration hub(s) traffic inclusive of monitoring of all deployed resources (prod and pre-prod), establishing automated alerting when thresholds are breached, and creating necessary dashboards and reports.

Infrastructure as a Service (IaaS) – cloud computing environments
The Contractor shall serve as the Administrator for the D365 application and products cloud computing/hosting environment. The Contractor shall manage VA virtual machines, VA storage, and VA backup functions that provide the ability to create, manage and delete virtual machines; provide the ability to create, delete and manage storage accounts; and provides the ability to create, delete and manage Cloud Service Provider (CSP) backup and recovery tools (e.g. Azure Recovery Services vaults for Backup related tasks) that allow the ability to enable and/or disable virtual machine backups, and initiate a virtual machine backup and/or restore operation.

5.5 OPTION PERIOD ONE

The Contractor shall perform all tasks required by Section 5.1-5.3, and 5.4.2-5.4.4, including all subtasks, of this PWS. Specifically, the Contractor shall provide one (1) Medium Non-Core Team (referred to as the Platform Team) to support all the services and deliverables for overarching management of work on Government D365 products. The Platform Team shall serve as the overarching support for the portfolio. The Platform Team shall guide the scrum level activities as well as collaboratively engage with the other Core and Non-Core Teams to manage the development and operations of D365 applications. The Platform Team shall provide the following type functions and expertise: Release Train Engineering, Operations Engineering, Security Engineering, System Architecture, and Lead Business Analysis.

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5.6 OPTION PERIOD TWO

The Contractor shall perform all tasks required by Section 5.1-5.3, and 5.4.2-5.4.4, including all subtasks, of this PWS. Specifically, the Contractor shall provide one Medium Non-Core Team (referred to as the Platform Team) to support all the services and deliverables for overarching management of work on Government D365 products. The Platform Team shall serve as the overarching support for the portfolio. The Platform Team shall guide the scrum level activities as well as collaboratively engage with the other Core and Non-Core Teams to manage the development and operations of D365 applications. The Platform Team shall provide the following type functions and expertise: Release Train Engineering, Operations Engineering, Security Engineering, System Architecture, and Lead Business Analysis

5.7 D365 INTAKE SUPPORT (OPTIONAL TASK ONE)

The Contractor shall provide product intake support for applications that are transitioned to the D365 Product Line. For each application taken in by the D365 Product Line, the Contractor shall work with the business stakeholders to identify epics. The period of performance for each exercise of this optional task shall be two months and completion of the intake requirements is not anticipated to require more than four resources.

The Contractor shall analyze the epics for the purpose of validating that the requirements are compliant with VA and D365, guidance and criteria for transition acceptance. The Contractor shall provide a Transition Acceptance Gap Analysis Report, describing any gaps between the actual product and the guidance and criteria for transition acceptance.

The Contractor shall adhere to applicable policies, processes, and standard operating procedures referenced in PWS 2.0.

Within 45 days of initial intake of each application (or group of applications taken in at one time), the Contractor shall provide a Certification of Receipt of Knowledge Transfer and Asset Transition, certifying they have received sufficient knowledge transfer to support the application(s) and that the assets transferred match those listed on the Certificate of Transition Completion for all Assets.

The Contractor shall develop an Individualized Sustainment Plan (ISP). This ISP shall include a sustainment roadmap for key sustainment milestones, describe operations and maintenance tasks, summarize partnership agreements, list the needed technical skillsets and resources, monitor performance and Service Level Agreements, provide reporting features and prioritize any backlog of deficiencies.

The Contractor shall update all applicable documentation pertaining to the applications being supported under this TO, and review all transitioned instances and artifacts, and the results of any Q&A, Demo, or side by side review. The Contractor shall not proliferate repositories without prior concurrence of the Government nor shall the Contractor create proprietary repositories for the purpose of maintaining Government software documentation.

Deliverables:

A. Transition Acceptance Gap Analysis Report
B. Certification of Receipt of Knowledge Transfer and Asset Transition

5.8 ADDITIONAL DEVOPS SUPPORT (OPTIONAL TASK TWO)

If VA exercises this optional task, the Contractor shall perform all tasks and subtasks required by Sections 5.1 through 5.3 and all corresponding sub-paragraphs of this PWS for additional D365 applications. The Government will determine the necessary team size for each application and shall exercise the Optional Task accordingly.

5.9 D365 PHASE-OUT TRANSITION SUPPORT (OPTIONAL TASK THREE)

If VA exercises this optional task, the Contractor shall:

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 PoP. 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 Optional Task 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 Phase-Out Transition Plan and schedule. At a minimum, the Phase-Out 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 D365 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.

Deliverable:

A. Phase-out Transition 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 activities to execute effort	Satisfactory or higher

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 January 18, 2017, the Architectural and Transportation Barriers Compliance Board (Access Board) revised and updated, in a single rulemaking, standards for electronic and information technology developed, procured, maintained, or used by Federal agencies covered by Section 508 of the Rehabilitation Act of 1973, as well as our guidelines for telecommunications equipment and customer premises equipment covered by Section 255 of the Communications Act of 1934. The revisions and updates to the Section 508-based standards and Section 255-based guidelines are intended to ensure that information and communication technology (ICT) covered by the respective statutes is accessible to and usable by individuals with disabilities.

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

The Section 508 standards established by the Access Board are incorporated into, and made part of all VA orders, solicitations and purchase orders developed to procure ICT. These standards are found in their entirety at: https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-ict-refresh/final-rule/text-of-the-standards-and-guidelines. A printed copy of the standards will be supplied upon request.

Federal agencies must comply with the updated Section 508 Standards beginning on January 18, 2018. The Final Rule as published in the Federal Register is available from the Access Board: https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-ict-refresh/final-rule.

The Contractor shall comply with “508 Chapter 2: Scoping Requirements” for all electronic ICT and content delivered under this contract. Specifically, as appropriate for the technology and its functionality, the Contractor shall comply with the technical standards marked here:

☒ E205 Electronic Content – (Accessibility Standard -WCAG 2.0 Level A and AA Guidelines)
☒ E204 Functional Performance Criteria
☒ E206 Hardware Requirements
☒ E207 Software Requirements
☒ E208 Support Services and Documentation Requirements

6.2.1 COMPATIBILITY WITH ASSISTIVE TECHNOLOGY

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

6.2.2 ACCEPTANCE AND ACCEPTANCE TESTING

Deliverables resulting from this solicitation will be accepted based in part on satisfaction of the Section 508 Chapter 2: Scoping Requirements standards identified above.

The Government reserves the right to test for Section 508 Compliance before delivery. The Contractor shall be able to demonstrate Section 508 Compliance upon delivery.

POINTS OF CONTACT

VA PROGRAM MANAGER

The VA Program Manager for this effort is:

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CONTRACTING OFFICER'S REPRESENTATIVE (COR)

The COR for this effort is:

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