FC #	Requirements Category (FC)	Rqmt #
1.0	Business Requirements	
		1.1
		1.2
		1.3
		1.4
		1.5
		1.6
		1.7
2.0	Stakeholder Requirements	
		2.1
		2.2
		2.3
		2.4
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		2.7
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		2.10
		2.11
		2.12
		2.13
		2.14
3.0	**Functional Requirements**	
		3.1
		3.1.1
		3.1.2
		3.1.3
		3.1.4
		3.1.5
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		3.1.10
		3.1.11
		3.1.12
		3.1.13
		3.1.14
		3.1.15
		3.2
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		3.2.3
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		3.3.3
		3.3.4
		3.3.5
		3.3.6

		3.10.1
		3.10.1.1
		3.10.1.2
		3.10.1.3
4.0	**Non-Functional Requirements**	
		4.1
		4.1.1
		4.2
		4.2.1
		4.2.2
		4.3
		4.3.1
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		4.15.7
5.0	**Transitional Requirements**	
		5.1
		5.1.1
		5.2
		5.2.1
		5.2.2
		5.2.3
		5.3
		5.3.1
		5.4
		5.4.1
		5.5
		5.5.1
		5.5.2
6.0	**Testing Requirements**	
		6.1
		6.1.1

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REQUIREMENTS TRACEABILITY MATRIX	
Description	**Business Priority Mandatory=M Desired= D**
Improve completion of Danger Assessments to 50% for high-risk clients and not high-risk clients within 6 months of implementation	D
Provide the capability to improve documentation, tracking, and reporting of client referrals/services provided by increasing five data categories to fifteen data categories and adding an option of creating more categories upon implementation	D
Reduce time and staff burden required to create accurate reports by 90% within 6 months of implementation	D
Reduce duplicate case creation to 1% through data validation and search functionality within 6 months of implementation	D
Improve mean post-implementation staff-reported efficiency, productivity, and satisfaction compared to pre-implementation within 6 months of implementation	D
Eliminate the need for multiple systems for tracking inventory, service delivery, client interaction narratives, and client data to one comprehensive case management system for all program data and processes	D
Improve data retention to 100% by eliminating all staff-identified data loss upon implementation	D
Ability to manage the case, maintain compliance with program requirements for follow up and assessment of the client's situation, providing additional services and support for the life of the case, or until the client has advised services are no longer needed.	M
Ability to initiate case creation with collection of key client demographic information and tracking of urgent services and support required by client.	M
Ability to perform follow-up, due date, and tracking of all activities throughout the case handling.	M
Ability to evaluate cases for eligibility to receive funds for specific needs.	M
Performance follow-up, due date and tracking of all activities throughout the case handling	M
Ability to complete/track assessments and complete documentation uploads	M
Ability to track Training and Outreach attendance / for all participants	M
Domestic Violence aggregated level data for all clients who receive support/services provided by DV Advocates and Case Managers	M

Ability for supervisors to view their Team and Staff workload and performance in a dashboard for all cases and view the workload across Advocates and Case Managers.	M
Ability to track outcome markers and metrics	M
Ability to view a timeline of incidents, services, and assessments for each client	M
Ability to maintain a calendar for appointments/alerts/reminders.	D
Ability to access dashboards to understand service metrics.	M
Ability to manage authorizations and vouchers for fund release.	M
Case Management Features	
Ability to track initial referral outcome disposition	M
Ability to utilize a needs assessment tool.	M
Ability to conduct client/case assessments and track progress.	M
Ability to conduct house assessments and track progression.	M
Ability to differentiate case types (crisis advocate cases and case management cases)	M
Ability to conduct Danger assessment within system	M
Ability to conduct MOVERS assessment within system	M
Ability to record and track client scores (risk and behavioral assessments).	M
Ability to maintain progress notes narrative.	M
Ability to link family profiles/grouping for case management.	M
Ability to unlink family profiles/grouping for case management at the supervisor level	
Ability to track required contact attempts and result (went to VM, or number disconnected, etc.)	M
Ability to track services provided to client	
Ability to schedule events like workshops, classes, and other events.	M
Ability to track client's eligibility status for goods/services	M
Ability to track associated costs with services	
Ability to provide case/client overview/summary with free text comments.	M
Ability to create multiple interactions for each client	M
Signatures	
Ability for clients to complete and sign forms from computer or mobile device	M
Ability to accept digital signatures.	M
Ability to capture and store e-signature consent.	M
Data Tracking	
Ability to provide a internal dashboard to exhibit and track key data indicators.	M
Ability to generate system-generated unique client ID.	M
Ability to create metrics (calculation, for example, days since last contact)	M
Ability to input client disposition into field with drop-down.	M
Ability to input referral source into field with drop-down.	M
Ability to track hotel/shelter request.	M

Ability to track tangible goods offered.	M
Ability to track outreach activities including agency name and agency's contact information	M
Ability to attach Photos/Files/Documents with narrative or note.	M
Ability to store and retrieve documents.	M
Forms	
Ability to create forms for capturing responses.	M
Ability to auto-populate forms with known data.	M
Ability to add, modify, or obsolete user-configurable data entry fields.	M
Ability to manage form versions and accessibility.	
Dashboards	
Ability to create dashboards.	M
Ability to convert data into different means (percent, average, etc.).	M
Ability to export queries into a spreadsheet (e.g., .xls or .csv)	M
Ability to build specific graphs, charts, and spatial maps	D
Communications	
Ability to create automated notifications, reminder, and alerts for staff and supervisors	M
Ability to send text messages to staff or supervisor as automated notifications, reminder, and alerts	D
Ability to send messages to specific and/or all staff/supervisors within the system.	D
Ability to send email messages alerting of notifications, case assignments, etc. within system	D
Case Load Management	
Ability to provide staff a workflow management dashboard including open cases, closed cases, cases with action items, etc	M
Ability to provide supervisors a workflow management dashboard for reviewing staff work	M
Ability to assign/reassign cases to staff as tasks.	M
Ability to alert case managers for follow-up on case	M
Service and Financial Tracking	
Ability to access dashboards to understand service metrics.	M
Ability to track expenditures and funds allocated to individual clients.	M
Ability to tie services rendered to specific budgets.	M
Ability to manage authorizations and vouchers for fund release.	M
Ability to track expenditures and funds allocated to individual clients.	M
Ability to tie services rendered to specific budgets.	M
Inventory	
Ability to read barcodes for inventory tracking.	D
Ability to track incoming and outgoing inventory items	D
Ability to track delivery of tangible goods (inventory items)	M
Ability to track cost of tangible goods distributed to clients	M
Case Files	

Ability to create case files that include all data for each client (field entries, narratives, case notes, tangible/services provided, assessments, etc.) for export for requirement 4.12.1	D
Ability to filter data to be included in case files as needed	D
Ability to format case files before export	D
Ability to export case files in multiple formats (.xls, .csv, .pdf, .doc, etc.)	D
Performance	
Ability to analyze large amounts of data in real-time- an average of 18,000 clients per year (±4,000)	M
Availability	
Ability to maintain 99% availability.	M
Ability to recover in accordance with service level agreements in the event of an outage.	M
Serviceability	
Ability to track service level agreement performance.	M
Ability to set up system alerts/flags based on SLA.	M
Ability to provide ongoing technical support post-deployment.	M
Ability to offer help desk support and training.	M
Ability to provide online and PDF versions of user manuals.	M
Security	
Ability to support Azure AD Single Sign-On (SSO) for users	M
Ability to provide a log-out time for inactive web browser sessions.	M
COSA to provide SFTP to vendor for data sharing	M
An architecture of the new proposed solution is required by the vendor when responding to the solicitation.	M
COSA Technology Standards- Cloud solutions should comply with our current technical standards.	M
Regulatory	
Ability to archive/store and delete records according to retention policies.	M
Data Integrity	
Ability to include a Data Dictionary.	M
Ability to enforce min and max field lengths.	M
Ability to enforce min and max value ranges.	M
Ability to provide picklists (Single selection) and (Multiple selection).	M
Ability to use drop-down or pop-up calendar to select date.	M
Ability to enforce alphabetic characters only.	M
Ability to enforce numeric characters only for integers.	M
Ability to enforce numeric characters only for decimals.	M
Ability to allow alphanumeric characters.	M
Ability to enforce validation on fields to ensure data integrity.	M
Ability to prevent duplicate client records from being created.	M
Ability to merge duplicate clients created in system for supervisor and data analyst levels only	M

Ability to delete client interaction- Supervisor level only	M
Ability to delete client record- Supervisor level only	M
Usability	
Ability to customize the platform consistent with the COSA branding elements, language, and text.	M
Ability to translate forms to a person’s preferred language.	D
Ability to provide a mobile app for easy access for staff	M
Ability to reduce barriers to access without a computer or internet connection.	M
Ability to provide a platform that is simple and intuitive to use.	M
The platform shall be mobile friendly on all mobile operating systems (e.g., iOS, Android)	D
Authentication	
Must support administrative or elevated account access using the City's Azure Multi-factor Authentication (MFA)	M
Ability to assign a unique user identifier to everyone who logs in to prevent generic logins or shared log ins.	M
Authorization Levels	
Must include a security matrix that defines access to screens for specific user groups (User Personas - profiles)	M
Must support Role-Based and Least Privileged access	M
Ability to control access to the system	M
Ability to assign a unique user identifier to everyone who logs in to prevent generic logins or shared log ins	M
Must prevent more than one instance of a user logon at any given time	M
Ability to enforce automatic session time-out after a pre-determined / reasonable period of inactivity (eg, 5-10 minutes)	M
Ability to terminate the session in such a manner that an unauthorized user cannot logon	M
Ability to create multiple levels of authorization to include, but not limited to, view-only access, update access, administrative access, and public-facing	M
Must use the City's Azure environment for account identity management	M
Ability to manage different levels of authorization for users.	M
Audit Tracking	
Ability to perform case historical tracking (audit logs).	M
Ability to track case history and edits of data.	M
Ability to provide an audit trail of all staff transactions.	M
External Interfaces	
Ability to automate data upload from JotForm and/or Power Automate with ability for case manager to perform data quality review before client profile creation.	D

Ability to initiate trigger emails to specific users when new data from external interface integration is ready for data quality review	D
Integrations	
Ability to integrate with FileNet to manage document retention	D
Ability to use a case status field to trigger retention policy changes, such as updating the date of retention when a case is reopened	D
Ability to use a case status field (such as Case Status: Closed) to trigger documents to be saved into FileNet for retention	D
Reporting Requirements	
Ability to schedule auto report run/email distribution.	D
Statistical Reporting based on data	M
Access to Migrated Data for reporting	M
Compliance Reporting	M
Performance Reporting	M
Inventory Reporting	M
Assessment Reporting	M
Alert/Critical Tasks due date reporting	M
Caseload/Workload Reporting	M
Milestone/Outcome reporting	M
Canned and Ad hoc Reporting capability	M
Client Records Release Consent Report	M
Ability to create unlimited custom reports	M
Ability to run performance, compliance & assessment reports & receive alerts/notifications.	M
Ability to run data-driven reports (Canned & Custom/Adhoc), view and personalize Dashboards to monitor team performance, compliance, and outcomes, extract a full data set/extract.	M
Ability to provide statistical reporting based on data.	M
Legal or Regulatory Requirements	
Must support Role-Based and Least Privileged access	M
Ability to track client consent for records release to discuss with high-risk team	M
Ability to ensure protection of personally identifiable data.	M
Ability to accept digital signatures.	M
The platform shall provide secure connections to data and be compliant with any regulatory requirements such as HIPAA, PHI, PII requirements and all COSA Technology standards	M
Must be in compliance with Health Information Technology for Economic and Clinical Health (HITECH) Act of 2009 and relevant provisions of the Texas Health and Safety Code § 181 as modified by HB 300; September 1, 2012.	M
Comply with the National Institute of Standards and Technology (NIST) and supporting publications listed below:	M
HIPAA Security Rule	M
NIST Special Publication 800-66	M
NIST Special Publication 800-53	M
NIST Special Publication 800-53A	M

Must restrict all staff of a given Program to the list of clients assigned to that Program, per HIPAA regulations	M
Ability to encrypt data during all facets of data transmission	M
ADA Compliance	M
Must comply with Americans with Disabilities Act (ADA)	M
Must be ADA-Compliant along with COSA Technology Standards	M
Ability to select foreground and background colors	M
Ability to modify text size	M
Ability to select audio output	M
Must support audible information and cues	M
Must support users with restricted or no hearing	M
Historical Data	
The vendor shall ensure that historical data from 10/1/2023 is present in the new system	M
Change Management	
Must require implementation of a change management and communication plan to be executed as part of this project.	M
The vendor shall provide ongoing system support post deployment that should include all the technical support necessary for City staff to operate the solution, including help desk support on general system use, configuration settings, report building, etc.	M
The vendor shall provide a timeline for project activities including but not limited to system setup and configuration, testing of all system functions, activities of each user permissions levels and training.	M
Data Migration	
Data migration of a total of current and past client record since 10/01/2023	M
Data Cleansing	
COSA shall provide any data cleansing necessary to migrate historical data into new system	M
Training	
The vendor should provide online and pdf versions of user manuals for the system.	M
The vendor shall provide end user training for the platform.	M
System Testing	
The proposed system should be properly tested to make sure it is working and meets the requirements of the business.	M

All system testing should be conducted by the vendor in partnership with ITSD technical staff to ensure that all the components and features of the new system are working correctly.	M
All system testing should be conducted by the vendor and ITSD technical staff to ensure that all the functionality listed in this requirements document is working correctly.	M
All system testing should be conducted by the vendor and ITSD technical staff to ensure that all the non-functional requirements listed in this requirements document have been tested and work as required.	M
A certification that system testing has been conducted and passed must be signed off by vendor and COSA ITSD.	M
In order for COSA BA to conduct UAT, a system specicication design document, wire frame prototype, walk through of the completed system and training should be provided to COSA project team.	M
A user manual must be provided to the COSA project team prior to training and UAT.	M
A QA enviroment and completed system should be provided so that the BA can validate functionality and create UAT scripts.	M
Exit Criteria from System Testing is zero critical and zero high defects.	M
The vendor and ITSD technical staff must provide project team with regular updates of system testing findings, any issues and resolution progress.	M
User Acceptance Testing	
An issues log for all Testing must be maintained.	M
All critical and high issues must be resolved prior to going to UAT.	M
The entrance criteria for UAT should consist of zero critical and zero high defects.	M
The Vendor and ITSD technical staff are required to support UAT.	M
COSA will facilitate UAT with the support of the vendor technical team and COSA technical team.	M
COSA SMEs and End Users will conduct UAT	M
A log will be used by COSA to capture all defects/issues to the COSA and Vendor technical teams.	M
Issues and defects are expected to be resolved by vendor and COSA immediately after these have been discussed, reviewed and prioritized by the business.	M
Vendor and COSA technical team is expected to support the re-testing by end users of all fixes until these are satisfactorily passed by end user testers.	M
The vendor shall provide a functioning platform available for User Acceptance Testing	M

	Vendor	
Comments	**Can vendor solution meet requirement? Y/N**	**Does requirement require customization? Y/N**
	Y	
	Y	
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r Solicitation Responses
Vendor Comments

We can create 5 dashboard widgets with flexible filters to meet the requirements

Spatial Maps are not supported

Will be developed
Will be developed

XLS can be for data, but if there are documents we will need to use a different format

The system logs an individual out after a set time,however we do not track the log out time.

We will be working on an object dictionary in Q3.

Staff are able to use web application on the mobile browser.
If desired, we can develop a custom mobile app that has local storage of the phone that can sync with myOneFlow once able to connect.

SSO will be configured and utilizing the COSA setup

myOneFlow will track the person who created it and the date time AND the last person that edited the data and the date time

We can do this but would need to understand more details before committing to an estimate.

The user is able to zoom in/out on the screen using the operating system capabilities.

We support the usage of external tools such as JAWS which aids in the audible function.

.csv file data only

Empyra will create a change management plan and communication plan as a part of our deliverables. We will work closely with COSA in the planning and execution of the change management plan.

Empyra will prepare a training plan and will deliver training options in a number of different forms. We will work closely with COSA to ensure that training is successful.
Empyra will provide workflow mapping and training materials.

Persona
Advocates and Case Managers
DV Supervisor
DV Data and Program Manager
DV Data Analyst
DV Community Outreach Workers
DV Stakeholders

Abilities
Will initiate case creation with collection of key client demographic information and tracking of urgent services and support required by client.
Will have particular cases assigned to them but will maintain the ability to view/edit/manage all cases based on urgent support/attention needed by clients.
Will maintain the ability to manage the case, maintain compliance with program requirements for follow up and assessment of the client's situation, providing additional services and support for the life of the case, or until the client has advised services are no longer needed.
Will have the ability to view their Team and Staff workload and performance in a dashboard for all cases and view the workload across Advocates and Case Managers.
Will have the ability to assign and reassign cases, as needed.
Will be able to run initial intake, inventory reports, compliance and assessment reports and receive alerts/notifications
Will be able to receive high risks automatic trigger notifications
will have the ability to run data driven reports (Canned and Custom/Ad hoc), view and personalize Dashboards to monitor team performance, compliance, and outcomes, extract a full data set/extract
will be able to view aggregated and statistical reports.
will be able to enter and view all training and outreach services provided.
access dashboards to understand the key metrics of the Domestic Violence program to understand if the goals are being met, and gain insight into the process from a metrics perspective