LETTER OF APPOINTMENT

MEMORANDUM FOR Angelica Matias, FEDSIM PM

Subject: Appointment as Contracting Officer's Representative

You are hereby appointed as the Contracting Officer's Representative (COR). This appointment is from the award date through the life of the Contract, to include close out, unless rescinded or transferred. As the COR, your primary duty is to monitor the Contractor's performance to ensure that all of the technical requirements under the contract are met by the delivery date or within the period of performance, and at the price or within the ceiling stipulated in the contract.

In the performance of the duties delegated to you in this letter, you are cautioned that you could be held personally liable for actions taken or directions given by you to the Contractor that are beyond the authorities given to you in this letter. The duties or authorities in this letter are not re-delegable; therefore, you must advise the Contracting Officer or the Contract Specialist immediately when you are unable to perform these duties.

Your duties and limitations, as applicable to the contract you will be monitoring, are as follows:

MONITORING AND EVALUATING PERFORMANCE

Ensure that the Contractor complies with all of the requirements of the statement of work, specifications, or performance work statement. When requested by the Contractor, provide technical assistance within the scope of the contract (e.g., interpreting specifications, statement of work, performance work statement, etc.). When a difference of opinion between you and the Contractor occurs, notify the Contracting Officer and/or the Contract Specialist immediately for resolution.

If the contract requires Key Personnel, the COR shall ensure that the personnel being used by the Contractor meet the requirements of the position. Review and approve travel and other direct cost (ODC) prior to the Contractor incurring those expenses. Any decrease in or lack of performance shall be brought to the attention of the Contracting Officer and/or Contract Specialist.

If applicable and in accordance with FAR 42.302, the COR shall monitor contractor compliance with specifications or other contractual requirements requiring the delivery or use of environmentally preferable products, energy-efficient products, products containing recovered materials, and bio-based products.

In accordance in Federal Acquisition Circular (FAC) 2005-34 and OMB Memorandum "Improving the Use of Contractor Performance Information" on July 29, 2009, CORs are responsible for entering past performance into the Past Performance Information Retrieval System (PPIRS) annually.

MONITORING COSTS

Review and evaluate the Contractor's progress in relation to the expenditures. When the costs expended by the Contractor are not commensurate with the Contractor's progress, request a meeting with the Contractor and client in an attempt to resolve. If a resolution cannot be found, bring this to the attention of the Contracting Officer and/or Contract Specialist for immediate action.

Review and approve invoices using the rates and other fees established in the contract. Review the Contractor's invoices/vouchers for reasonableness and applicability to the contract and recommend approval or rejection for payment.

CHANGES TO THE CONTRACT

You cannot authorize the Contractor to stop work, and you are not authorized to delete, change, waive, or negotiate any of the technical requirements or other terms and conditions of the contract. Should a change (monetary or otherwise) to the contract become necessary, it must be made by a contract modification issued by the Contracting Officer. When in doubt, contact the Contracting Officer and/or Contract Specialist.

Any contract change requested by the Contractor must be put in writing by the Contractor to the Contracting Officer for action. If, however, you become aware of an impending change, you should immediately advise the Contracting Officer or Contract Specialist. When the proposed change is received by the Contracting Officer, you will be required to provide the Contracting Officer with a written analysis and rationale for the change and to evaluate any costs associated with the change.

You must also recognize and report to the Contracting Officer any Government-required changes to the contract (e.g., items or work no longer required, changes in the specifications, etc.).

INSPECTION OF CONTRACT ITEMS

Perform, in accordance with the terms of the contract, inspection, acceptance, or rejection of the services or deliverables under the contract. The COR must prepare, in writing, a written acceptance or rejection, provide it to the Contractor, and store a copy on the FEDSIM common drive. Immediately notify the Contracting Officer of all rejections and the reason for the action.

Review progress reports from the Contractor and advise the Contracting Officer of any Contractor problems or action required to be taken by the Government.

STANDARDS OF CONDUCT AND CONFLICT OF INTEREST

To avoid improper business practices and personal conflicts of interest and to deal with their apparent or actual occurrences, the COR shall sign any applicable non-disclosure forms. The COR shall also immediately report any potential conflict of interest to their supervisor.

CONTRACT FILE CONTENT AND MAINTENANCE

Establish and maintain an organized contract administration file to record all Contractor and Government actions pertaining to the contract. The file must also include a copy of the COR Letter of Appointment and other documents describing the COR duties; a copy of the contract administration functions delegated to the contract administration office, which may not be delegated to the COR; and documentation of COR actions taken in accordance with the delegation of authority. The files should be organized and saved on the FEDSIM common drive.

CONTRACT CLOSEOUT

Within 30 days after the Contractor has met all terms and conditions of the contract, you must evaluate the Contractor's performance using the information contained in General Services Administration Regulation (GSAR) 542.1503-71 (sample format attached).

Please acknowledge receipt and acceptance of this appointment by signing below. Please direct any questions you may have on this delegation to the Contracting Officer or Contract Specialist.

I understand and accept my assignment as the Contracting Officer's Representative (COR)

X _____

GSAR 542.15 – Contractor Performance Information

542.1503-71 – Information to collect.

Note: This checklist follows the standard format of GSAM 542.1542.15 and content requirements of GSAM 542.15. The checklist may be tailored for the specific contract type. Any "NO" responses noted below shall be accompanied with a statement explaining the observation(s). For each observation(s) provide a recommendation to correct the non-compliance. Observations identify areas of non-compliance and do require response (and action plans, if applicable). Positive observations may be general or specific and may be suitable for replication across the agency as good practices.

Contractor Performance Information

Timeliness of delivery or performance	Yes	No	NA
(1) Adherence to contract delivery schedules.			
(2) Resolution of delays.			
(3) Number of "show cause" letters and "cure notices" issued.			
(4) Number of delinquent deliveries.			
(5) Number of contract extensions resulting from contractor-caused delays.			
(6) Timely submission or performance or required tests.			
(7) Other.			
Observations (specify item #): ***Recommendations***:			

Conformance of product or service to contract requirements	Yes	No	NA
(1) Quality of workmanship.			
(2) Reliability.			
(3) Adequacy of correction of defects.			
(4) Number of safety defects.			
(5) Number of product rejections.			
(6) Results of laboratory tests.			
(7) Number and extent of warranty problems.			
(8) Other.			
Observations (specify item #): ***Recommendations***:			

GSAR 542.15 – Contractor Performance Information

542.1503-71 – Information to collect.

Customer comments	Num	Qty	NA
(1) Number and quality of positive comments.			
(2) Number and nature of complaints.			
(3) Adequacy of resolving customer complaints.			
(4) Other.			
Observations (specify item #): ***Recommendations***:			

Terminations for default	Yes	No	NA
Observations (specify item #): ***Recommendations***:			

On-the-job safety performance record, including the number of lost or restricted workdays due to occupational injuries in comparison to the national average	Yes	No	NA
Observations (specify item #): ***Recommendations***:			

Adequacy of contractor's quality assurance system	Yes	No	NA
Observations (specify item #): ***Recommendations***:			

Compliance with other key contract provisions	Yes	No	NA
(1) Subcontracting program			
(2) Labor standards			
(3) Safety standards.			
(4) Reporting requirements			
Observations (specify item #): ***Recommendations***:			

GSAR 542.15 – Contractor Performance Information

542.1503-71 – Information to collect.

Exhibiting customer-oriented behavior	Yes	No	NA
Observations (specify item #): ***Recommendations***:			

Other performance elements identified	Yes	No	NA
Observations (specify item #): ***Recommendations***:			

ATTACHMENT E – TRAVEL AUTHORIZATION

REQUEST FOR TRAVEL AUTHORIZATION				
***Request must contain this information at a minimum**				
Date		**Travel Request No.**		
FEDSIM Project Number		**Contract No.**		
TO CLIN Number		**Task Order No.**		
Project Title				
Name of Traveler				
Name of Company (Contractor/Subcontractor)	.			
Origination				
Destination				
Departure Date				
Return Date				
Organization(s) Visited				
Purpose of Travel				
Requested by	Name of Government Person			
Trip Report Required	Yes			
		Daily Amt	**No of Days**	**Totals**
Estimated Travel Costs	Airfare for 1 person			$ -
	Rental Car			$ -
	Lodging			$ -
	Lodging & Taxes			
	MIE			$ -
	Transportation			$ -
	Parking at Airport			$ -
	Other: POV & Gas			$ -
	Other: {Identify)			$ -
	Subtotal			**$ -**
G&A:	G&A @ X %:			**$ -**
	Total			**$ -**
TPOC	Typed Name			
	(Signature)			
COR Approval	Typed Name			
	Signature and Date			

ATTACHMENT F – CONSENT TO PURCHASE

Request #: XXXXXXXX
Date: XXXXXXXX
From: (Contractor Name)
To: FEDSIM
1800 F Street, NW
Suite 3100
Washington, DC 20405
Attn: FEDSIM COR

Subject: Consent to Purchase

Reference: Contract Number XXXXXXXX/Task Order No. XXXXXXXX

(Contractor), in support of the (client) requests consent to purchase the below services under CLIN No. XXXX of the referenced contract. The cost of these items, when added to all other items purchased under CLIN XXXX does not exceed the funded amount of CLIN No. XXXX.

Justification for Purchase:

Qty	Unit	Description	Unit Price	Total
			Subtotal *Sales Tax* *Shipping & Handling (approx.)* *Other*	
			Total	

Recommended Source:	**Justification for Source Selection:**
Additional Comments	***Approving Officials:***
TPOC:	**Date:**
Ship To:	**Items Required On/Before:**

REQUEST TO INITIATE PURCHASE PARTS/TOOLS/ODCs AND/OR SERVICES (RIP)**

Contractor:
Client:

TOOL#:
Date:
Project Name:
Project/IA#:
Contract/Task Order:

** If the Prime Contractor has an approved purchasing system the Contractor shall prepare and submit a RIP to be reviewed and signed by the FEDSIM COR.

Last Inv submitted:

TO: FEDSIM Contracting Officer's Representative

FROM: Requestor
THROUGH: Client POC

CLIN # VALUE:	**$0.00**
CUMULATIVE AMOUNT BILLED:	**$0.00**
BALANCE:	**$0.00**
RIP ESTIMATE:	**$0.00**
BALANCE:	**$0.00**

SUBJECT: Request to Initiate Purchase #

DATE:

Client Point of Contact:

PURPOSE/JUSTIFICATION OF REQUEST:

The purpose of this request is to

Below is the estimated cost of purchase:

ITEM **Tool (CLIN #):**	
Cost to Government: @#	**$ -**
Fee	**$ -**
General & Administrative (G&A) Cost	**$ -**
Total Cost Not to Exceed (NTE):	**$ -**

All material purchases shall be made in accordance with customer requirements. All materials shall become the property of the Government and shall be regarded as Government Furnished Property (GFP), and unless previously approved by the Contracting Officer, shall be used only in performance of this Task Order. All materials shall be purchased in accordance with FAR 52.244-2 and approved purchasing procedures. All Tools and ODCs shall be purchased in accordance with Task Order requirements and shall not exceed the funded amount on this Task Order.

It is the responsibility of the Contractor to ensure that the prices quoted are fair and reasonable at the time of submission and are in the best interest of the Government. The Contractor shall furnish price quotes for hardware and software purchases.

Please contact me at (000) 000-0000 if you have any concerns or questions.

FEDSIM COR Approval:

Signature Date

DEFINITIONS
FIELD
Requirement Number
Requirement Type
Non-Functional Type
Description
Mandatory / Optional
Who

TECHICAL EVALUATION DEFINITIONS
In The Box
Extension
Customization

DESCRIPTION
This is an internal requirements number being used as the "requirements Name" in the GSA requirements repository.
Functional or Non-functional or OPM. OPM requirements are the HRLOB Target requirements set from the OPM web site.
If Non-functional, this states what type of non-functional requirements such as Performance, Security, etc.
This is the text of the requirement. During fit-gap, these requirements will be elaborated on and more details can be provided.
Mandatory requirements must be provided for GSA to accept the system. Optional requirements are those requirements that are useful for GSA or our partner agencies, but can be provided either at later phases or as negotiated. These have no relation to "optional CLINs / tasks" in the PWS.
Designates whether the requirement is performed by the Shared Service Center or a combination of the Shared Service Center and the Agency (GSA, OPM, etc)

Capability is avilable for proposed product out-of-the-box with configuation
Capability is avilable with extension(s)
Capability is avilable through code customization

Requirement Number	Requirement Type	Non-Functional Type
GHRS002	Non-functional	Integration
GHRS003	Non-functional	Technical Specification
GHRS004	Non-functional	Technical Specification
GHRS006	Non-functional	Technical Specification
GHRS007	Functional	
GHRS008	Functional	
GHRS009	Non-functional	Integration
GHRS013	Functional	
GHRS013.01	Functional	
GHRS014	Functional	
GHRS014.01	Functional	
GHRS015	Functional	
GHRS017	Functional	
GHRS018	Functional	
GHRS020	Functional	
GHRS021	Functional	
GHRS022	Functional	
GHRS024	Non-functional	Integration
GHRS028	Non-functional	Integration
GHRS029	Non-functional	Integration
GHRS030	Non-functional	Performance
GHRS031	Non-functional	Integration

HRS001	OPM	
HRS002.01	Functional	
HRS002.02	Functional	
HRS002.03	Functional	
HRS002.04	Functional	
HRS002.05	Functional	
HRS002.06	Functional	
HRS002.07	Functional	
HRS002.08	Non-functional	Integration
HRS002.09	Functional	
HRS002.10	Functional	
HRS002.11	Functional	
HRS006	OPM	
HRS006.01	Functional	
HRS006.02	Functional	
HRS007	OPM	
HRS008	OPM	
HRS008.01	Functional	
HRS008.02	Functional	
HRS008.03	Functional	
HRS008.04	Functional	
HRS008.05	Functional	
HRS010.02	Functional	
HRS010.03	Functional	
HRS010.04	Functional	

HRS010.05	Functional	
HRS010.06	Functional	
HRS011	OPM	
HRS011.01	Functional	
HRS012	OPM	
HRS012.01	Functional	
HRS013	OPM	
HRS013.01	Functional	
HRS013.02	Functional	
HRS013.03	Functional	
HRS013.04	Functional	
HRS014	OPM	
HRS016	OPM	
HRS017.01	Functional	
HRS017.02	Non-functional	Integration
HRS017.03	Functional	
HRS017.04	Non-functional	Technical Specification
HRS019	OPM	
HRS020	OPM	
HRS021	OPM	
HRS022	OPM	
HRS022.01	Functional	
HRS023	OPM	
HRS024	OPM	
HRS025	OPM	

HRS026	OPM	
HRS026.01	Functional	
HRS027	OPM	
HRS027.01	Functional	
HRS028	OPM	
HRS028.01	Functional	
HRS028.02	Functional	
HRS028.03	Functional	
HRS028.04	Functional	
HRS028.05	Functional	
HRS028.06	Functional	
HRS028.07	Functional	
HRS028.08	Functional	
HRS028.09	Functional	
HRS029	OPM	
HRS029.01	Functional	
HRS030	OPM	
HRS030.01	Functional	
HRS030.03	Functional	
HRS030.04	Functional	
HRS031	OPM	
HRS031.01	Functional	
HRS031.02	Functional	
HRS031.04	Functional	
HRS031.05	Functional	

HRS031.06	Functional	
HRS031.07	Functional	
HRS031.08	Functional	
HRS031.09	Functional	
HRS031.10	Functional	
HRS032.02	Functional	
HRS032.04	Functional	
HRS032.05	Functional	
HRS032.06	Functional	
HRS032.07	Functional	
HRS032.08	Functional	
HRS032.09	Functional	
HRS032.10	Functional	
HRS034	OPM	
HRS035	OPM	
HRS035.01	Functional	
HRS035.02	Non-functional	Integration
HRS035.03	Functional	
HRS035.04	Functional	
HRS035.05	Functional	
HRS035.06	Functional	
HRS035.07	Functional	
HRS035.08	Functional	
HRS035.09	Functional	
HRS035.10	Non-functional	Technical Specification
HRS035.11	Non-functional	Technical Specification

HRS035.12	Non-functional	Technical Specification
HRS036	OPM	
HRS036.01	Non-functional	Integration

Description
Solution must support customer facing portal that allows for user customized data query and reporting.
The solution shall provide user-friendly, dashboard type format for standard reports and ad hoc reporting.
The solution shall provide a data analytics tool that can run routine reports, ad hoc and custom reports and provides a business intelligence environment.
The solution shall consolidate systems where possible so that Data Analytics Group does not have to manage separate universes so required information/data can be provided from a centralized node.
The solution shall provide robust self-service capabilities.Requirement is to make the system more intuitive for self service users so that users can take advantage of self-service options.
The solution shall provide automated Position Management functionality.
The solution shall resolve anomalies and indexing issues between the Position Management Universe (PMU) and Training Documentation system to enable accurate and timely mass data retrievals.
The solution shall limit access to data reports and dashboards by user roles.
The solution shall ensure access to PII in reports and dashboards is limited by user role.
The solution shall provide detailed explanations for changes associated with the Nature Of Action (NOA) codes so that Data Analytics Group can see the changes and get the explanations for changes.
The solution shall provide access to the 002-Correction and 001-Cancellation data to be able to see all the changes for all NOA codes.
The solution shall provide roles (and access) to HR data based on the following roles: Analytical, Managerial, Everyday user.
The solution shall provide users (HR IT ADMINISTRATORS, HR DATA STEWARDS, DATA ANALYTICS GROUP) with a data analytics tool that can run routine reports, ad hoc and custom reports and provides a business intelligence environment.
The solution shall provide user (EMPLOYEE, MANAGER EMPLOYEE) self-service capability through a configurable Portal, including access to GSA legacy systems.
The solution shall provide users (EMPLOYEES) to have view only access to CHRIS (legacy HR system).
The solution shall provide users (HR IT ADMINISTRATORS, PERSONNELISTS) with CHRIS (legacyHR system) edit privileges.
The solution shall enable users (HR IT ADMINISTRATORS and DATA ANALYTICS GROUP) to report accountability data for contingent workforce (contractors).
Solution must enable user (HR IT SPECIALIST, DATA ANALYTICS GROUP) to create real time reports or interface with a system that can create real time reports on a scheduled or ad hoc basis.
The solution shall provide streamlined connectivity to data warehouse.
Solution system must enable user (HR IT SPECIALIST) to be able to selectively identify information that will not be transmitted to data warehouse for permanent storage and trend analysis.
The solution shall generate real-time data in order for users (HR IT SPECIALIST, DATA ANALYTICS GROUP) to report progress on required immediate actions.
The solution shall provide Master Data management control/integration capabilities through data consolidation (ETL), data federation, and/or data propagation methods.

Recommend data sources.
The solution shall centralize, standardize, and automate reports.
The solution must provide flexibility to fulfill customized user demands. (Fulfill current unique 2-letter demands.)
The solution must support reports generation in the following format: Standardized routine reports that provide data to all or specified users.
The solution must support self-service reports generation.
The solution must support reports generation in the following format: Ad hoc reports that can be tailored to needs of the requestor without unnecessary manual tasks.
The solution must support reports generation in the following way: An ability to customize reports to fulfill individual requests.
Requirement is to make access and data delivery more intuitive (user friendly) so that users will follow self-service processes in order reduce individual requests for information to agency's Data Analytics Group.
The solution shall consolidate systems where possible so that Data Analytics Group would not have to manually source data from multiple universes.
The solution shall provide improved capability to run queries through a single universe and centralized and consolidated HR IT System.
The solution shall recognize user roles so that access and distribution of data can be controlled. Constraints include ensuring capability to strip PII from reports where applicable.
The solution shall provide a streamlined, standardized, centralized, and automated capability to report trend information to enable GSA management teams to adequately evaluate HR organizational risk. This includes being able to customize as requirements change (potentially by being able to filter or select from a list of elements)
Provide multitiered customer support to agencies on HR-related issues.
The solution shall provide multi-tiered customer support to supported agencies on HR-related issues
The solution shall provide user (EMPLOYEE) access to multi-tiered customer support
Make required data available electronically.
Provide self-service tools to support ad hoc data requests.
The solution shall provide EMPLOYEEs with self-service tools to support ad hoc data requests.
The solution shall provide SUPERVISORs with self-service tools to support ad hoc data requests.
The solution shall provide PERSONNELISTS with self-service tools to support ad hoc data requests.
The solution shall provide any EMPLOYEE the ability to query status of personnel actions associated with them via self-service
The solution shall provide any EMPLOYEE the ability to query status of their security investigation via self-service
Solution will be compliant with 5 CFR, Section 10.3, OPM authority to review personnel management programs and practices.
Solution will enable the Office of Personnel Management to review human resources management programs and practices of GSA and all supported external agencies in order to report status and trends to the GSA Administrator and the President.
Solution will enable users (AUDITORS) to access required HR System data to measure the effectiveness HR programs and the consistency of merit system principles.

Solution will enable users (AUDITORS) to maintain a specified role (AUDITOR) in order to conduct financial and classification audits.
Solution will enable users (AUDITORS) (third party vendors) to have continuous access and controls to the HR IT System to conduct external audits without system administrator intervention.
Support periodic review of HR transactions to ensure compliance with Federal laws regulations, Merit Principles, and agency-specific requirements.
Support periodic review of HR transactions to ensure compliance with Federal laws regulations Merit Principles and agency-specific requirements IAW 5 USC, Section 2301, Merit System Priniciples; 5CFR; HCAAF Section VI, p. VI-6 (Sept.2005).
Take corrective action in cases of noncompliance or errors relating to HR transactions.
Take corrective action in cases of noncompliance or errors relating to HR transactions IAW 5 USC, Section 2302, Prohibited Personnel Practices; 5 CFR HCAAF Section VI, p. VI-6 (Sept 2005).
Provide automated processes that can support and facilitate succession planning.
The solution shall provide automated processes that can support and facilitate succession planning.
The solution shall provide the flexibility for HR (SUPERUSER) to alter workflow and automated processes associated with future succession planning, to reflect changed guidance and regulations
The solution shall provide scenario planning support for WORKFORCE PLANNERS to forecast future scenarios for targeted positions or occupations
The solution shall support cohort and force projections and estimates
Provide an automated process that captures requests for workforce information.
Provide an automated process that tracks requests for human capital information.
The solution shall enable users (DATA ANALYTICS GROUP) to generate periodic reports directly from the HR System.
The solution shall enable users (Data Analytics Group) to be able to pull data from the HR IT System in order to use Business Intelligence tools (Business Objects) to conduct data analysis and assemble reports for strategic planning.
The solution shall provide data and reports at preset intervals (immediate/hourly/daily/weekly/monthly/quarterly/yearly/5 year/10 year/20 year)
The solution shall provide access to relational database output so that ad hoc requests for data/reports can be easily managed.
Analyze data on strategies, trends, issues, and events relevant to the human capital strategic planning process using predefined data analysis protocols.
Provide analysis and/or reports on qualitative and quantitative data relevant to Human Capital strategic planning.
Provide an automated capability to prepare data for analysis to support human capital strategic planning.
Ensure that the information systems can provide human capital data to all appropriate management levels in order to guide planning analysis and decision making.
Ensure that the information systems can provide human capital data to all appropriate management levels in order to guide planning analysis and decision making IAW HCAAF Section II, p. II-15 (Sept 2005).
Provide appropriate environmental data to stakeholders involved in the human capital strategic planning process.
Update competency management framework periodically.
Implement Competency Models.

Provide automated processes that can support competency management that meets the HCAAF requirements.
The solution shall provide automated processes that can support competency management that meets the OPM Human Capital Assessment and Accountability Framework (HCAAF) requirements.
Gather information on a recurring basis about actual HR spending and HR financial performance results compared to budgeted HR funds.
Gather information on a recurring basis about actual HR spending and HR financial performance results compared to budgeted HR funds IAW President's Management Agenda, Paragraph 5, The Expected Long-Term Results, bullet 1.
Produce reports on a recurring basis about actual HR spending and HR financial performance results compared to budgeted HR funds.
Produce reports on a recurring basis about actual HR spending and HR financial performance results compared to budgeted HR funds IAW President's Management Agenda, Paragraph 5, The Expected Long-Term Results, bullet 4.
The solution shall provide a budget and staffing plan incorporating data from various sources, such as Staffing, Finance, etc.
The solution shall include the ability to present budget to date, true spend, and GSA organization budget cap with integration into budget spend data.
The solution shall provide reporting capabilities for vacancies.
The solution shall provide reporting capabilities with multiple views and decision support functionality.
The solution must provide reporting internal to HR as well as to different agency business lines, with data specific to each business line (e.g., run rates, budget, caps, and spend).
The solution must provide reporting capabilities that blend historical and current data.
The solution must provide reporting capability that minimizes manual processes and offline spreadsheets.
The solution shall provide reporting functionality that provides future year run-rates (a business report).
Disseminate reports on a recurring basis about actual spending and financial performance results compared to budgeted funds.
Disseminate reports on a recurring basis about actual spending and financial performance results compared to budgeted funds IAW PMA President's Management Agenda, Paragraph 5, The Expected Long-Term Results, bullet 4.
Provide automated processes that support the development and application of human capital (HC) measures and metrics.
The solution shall provide automated processes that support the development and application of human capital (HC) measures and metrics
The solution shall support development and application of "cascaded" HC measures that align to the measures and objectives of the parent organization
The solution shall support development and application of organization-unique HC measures
Track workforce trends.
Track workforce trends IAW HCAAF Section IV, p. IV-26 (Sept. 2005).
The solution shall enable internal tracking of workforce trends
The solution shall enable users (PERSONNELISTS, DIRECTORS, WORKFORCE PLANNERS, SUPERUSERS) to generate reports on workforce data trends
The solution shall enable users (PERSONNELISTS, DIRECTORS, WORKFORCE PLANNERS, SUPERUSERS) to generate reports on workforce data trends relating to: attrition

The solution shall enable users (PERSONNELISTS, DIRECTORS, WORKFORCE PLANNERS, SUPERUSERS) to generate reports on workforce data trends relating to: recruiting / hiring
The solution shall enable users (PERSONNELISTS, DIRECTORS, WORKFORCE PLANNERS, SUPERUSERS) to generate reports on workforce data trends relating to: competencies
The solution shall enable users (PERSONNELISTS, DIRECTORS, WORKFORCE PLANNERS, SUPERUSERS) to generate reports on workforce data trends relating to: development / training
The solution shall enable users (PERSONNELISTS, DIRECTORS, WORKFORCE PLANNERS, SUPERUSERS) to generate reports on workforce data trends relating to: position level (e.g. GS level)
The solution shall enable users (PERSONNELISTS, DIRECTORS, WORKFORCE PLANNERS, SUPERUSERS) to generate reports on workforce data trends relating to: region / location
The solution shall support analysis of internally-captured workforce trends
The solution shall support analysis by specific users (PERSONNELISTS, WORKFORCE PLANNERS, SUPERUSERS) of workforce data trends relating to: attrition
The solution shall support analysis by specific users (PERSONNELISTS, WORKFORCE PLANNERS, SUPERUSERS) of workforce data trends relating to: competencies
The solution shall support analysis by specific users (PERSONNELISTS, WORKFORCE PLANNERS, SUPERUSERS) of workforce data trends relating to: position level (e.g. GS level)
The solution shall support analysis by specific users (PERSONNELISTS, WORKFORCE PLANNERS, SUPERUSERS) of workforce data trends relating to: recruiting / hiring
The solution shall support analysis by specific users (PERSONNELISTS, WORKFORCE PLANNERS, SUPERUSERS) of workforce data trends relating to: region / location
The solution shall support analysis by specific users (PERSONNELISTS, WORKFORCE PLANNERS, SUPERUSERS) of workforce data trends relating to: development / training
The solution shall provide the ability for select users (SUPERUSERS or delegates) to edit questions within predefined surveys
Provide an automated needs assessment tool to support HC planning.
Provide automated survey tools/processes (e.g. customer services organizational assessment multi-rater assessment).
The solution shall provide automated survey tools/processes support across the HR system (e.g. customer services, organizational assessments, multi-rater assessments)
The solution's automated survey tools/processes shall be able to interface with the respective GSA specified system and support bidirectional data flow
The solution shall provide the ability for select users (SUPERUSERS or delegates) to create surveys as part of an automated workflow
The solution shall provide the ability for select users (SUPERUSERS or delegates) to edit answer ranges within predefined surveys
The solution shall provide select users (PERSONNELISTS, SUPERUSERS, DIRECTOR) data from surveys for data trending and assessment
The solution shall support summary reporting of any surveys generated through the system
The solution shall support surveys being assigned to a group on the basis of: individual identification (e.g. list of names)
The solution shall support surveys being assigned to a group on the basis of: group identity
The solution shall support surveys being assigned to a group on the basis of: workflow stage (e.g. New Hire that just completed onboarding)
The solution shall support surveys being assigned to a group on the basis of: statistical sampling
The solution shall accept data using current technology and interfaces.

The solution shall disseminate data using current technology and interfaces.
Utilize OPM's Enterprise Human Resources Integration (EHRI) Analytic Tools to collect analyze and forecast workforce data and trends.
The solution must be provided access to and receive data from EHRI in order to enhance data delivery.

Mandatory / Optional	Who	In The Box	Extension	Customization
Optional	Shared Service Center			
Optional	Shared Service Center			
Mandatory	Shared Service Center			
Optional	Shared Service Center			
Optional	Shared Service Center			
Optional	Shared Service Center			
Optional	Shared Service Center			
Mandatory	Shared Service Center			
Mandatory	Shared Service Center			
Optional	Shared Service Center			
Mandatory	Shared Service Center			
Optional	Shared Service Center			
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Optional	Shared Service Center
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Optional	Shared Service Center
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Mandatory	Shared Service Center
Optional	Shared Service Center
Optional	Shared Service Center
Optional	Shared Service Center
Mandatory	Shared Service Center

Mandatory	Shared Service Center
Optional	Shared Service Center
Mandatory	Shared Service Center
	TOTAL

Requirement Number	Requirement Type	Non-Functional Type
LR002	OPM	
LR003	OPM	
LR003.01	Functional	
LR004	OPM	
LR007	OPM	
LR007.01	Functional	
LR008	OPM	
LR008.01	Functional	
LR012	OPM	

Description
Ensure that collective bargaining agreements are recorded in appropriate databases.
Support the implementation of an agreement made between management and the exclusive representative of a labor unit.
Support the implementation of an agreement made between management and the exclusive representative of a labor unit IAW 5 USC 7114(b)(5).
Verify deduction of dues from the pay of the union members is appropriate in accordance with 5 USC 7115(c).
Capture data related to labor relations contract administration.
Capture data related to labor relations contract administration IAW 5 USC.
Provide labor relations support that enables the agency to accomplish its mission.
Provide labor relations support that enables the agency to accomplish its mission IAW HCAAF Section IV: Labor Management Relations.
Capture data related to labor-management relations programs.

Mandatory / Optional	Who	In The Box	Extension	Customization
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
	TOTAL			

DEFINITIONS
FIELD
Requirement Number
Requirement Type
Non-Functional Type
Description
Mandatory / Optional
OPM Functional Area
Who

TECHICAL EVALUATION DE
In The Box
Extension
Customization

DESCRIPTION
This is an internal requirements number being used as the "requirements Name" in the GSA requirements repository.
Functional or Non-functional or OPM. OPM requirements are the HRLOB Target requirements set from the OPM web site.
If Non-functional, this states what type of non-functional requirements such as Performance, Security, etc.
This is the text of the requirement. During fit-gap, these requirements will be elaborated on and more details can be provided.
Mandatory requirements must be provided for GSA to accept the system. Optional requirements are those requirements that are useful for GSA or our partner agencies, but can be provided either at later phases or as negotiated. These have no relation to "optional CLINs / tasks" in the PWS.
Functional area that this requirement aligns to in the OPM HRLOB target requirements
Designates whether the requirement is performed by the Shared Service Center or a combination of the Shared Service Center and the Agency (GSA, OPM, etc)

FINITIONS
Capability is avilable for proposed product out-of-the-box with configuation
Capability is avilable with extension(s)
Capability is avilable through code customization

HRT2T Program

Interface Control Document between
HR Shared Service Center
and the Department of Health and Human Services
Federal Occupational Health Employee Eligibility System

Dated – June 2016

Interface Control Document between
HR Shared Service and HHS FOH EES

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Interface Control Document between
HR Shared Service and HHS FOH EES

1 Introduction

The Human Resources (HR) Shared Service Center (SSC) will be the new system that GSA's Office of Human Resources (OHRM) (and its customers) use to manage HR functions. This is an approved OPM SSC that will require interfaces with GSA systems. The HR SSC will include many primary core functions, but as it relates to this interface, the HR SSC will include~~:~~ the authoritative list of employees and their characteristics, and the time recording data for each employee for each pay period. There are multiple existing interfaces between GSA's current ~~system~~ Comprehensive Human Resources Integrated System (CHRIS) and GSA systems. These interfaces must be retained in the new system to avoid rework of the GSA systems.

GSA uses services of the Department of Health and Human Services (HHS) Federal Occupational Health (FOH) division. The HR SSC solution will need to provide a full list of GSA (and its customers) employees on a regular basis. The system within FOH is known as the Employee Eligibility System (EES) as it provides data to their work life system for all employees of the federal government.

Note - The actual file formats and fields are subject to change prior to implementation of the interface but are provided here for evaluation by the vendor of the complexity of the interfaces.

2 Scope

The data flows between the HR SSC and LMS will be primarily file based flows using SFTP. Please consult the details of each flow for confirmation of the protocols, data types, etc. The following table summarizes the data flows.

Interface Name	Description	Source System	Target System	Existing File?
Employee Data	Provide a full listing of employees in the HR database.	HR SSC	HHS FOH EES	Y

3 Detailed Specification

Each flow described in the Scope section has its own specification.

3.1 Employee Data – HR SSC to EES

3.1.1 Interface Overview

Summary of Interface	
Attribute	**Description**
RTM Number	GNFR052
Purpose of Interface	HHS provides services to employees across the federal government for work life Employee Assistance Program. In order for employees to use the service, HHS needs to confirm their eligibility. Each agency provides them with a list of employees. This interface provides that for GSA and its clients.
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	HHS FOH EES
Receiving System Owner	TBA
Type of File	ASCII with pipe (|) as the delimiter
Number of data elements	26
Description of data elements in interface	Employee data
Transfer Protocol	SFTP
Production Frequency	Monthly
Sequencing of interface	N/A
Timing constraints	Not available
Approximate size of file	1070 – 1100 bytes * 12,000 employees
File Name Format	GSA_EES_Update_<YYYY-MM-DD HH:MM.dat>
Other Notes and Comments	

3.1.2 Interface Detailed Specifications (if applicable)

The file that is deployed contains one Header row and then a row for each employee with pipes (|) delimiting each field of the row. The following table provides the details of the header row and the table after that provides the details of each employee row. The Agency ID would be GSA. A table of the codes can be provided before implementation.

Header

Data Item	Data Type	Length	Format
Label (Default Value : Header)	Character	6	
Agency ID	Character	20	
Number of rows passed	Number	8	

Employee Data Layout

Data Item	Data Type	Length	Format
Unique Employee Number	Number	9	
First Name	Character	20	
Last Name and Suffix	Character	25	
Middle Name	Character	25	
E-Mail Address	Character	129	
Employee ID Number	Character	8	Last Four Digits of SSN and 4 Digit Year of Birth
Birth Date	Date	8	MMDDYYYY
Latest Hire Date	Date	8	MMDDYYYY
Gender	Character	1	
Owning Region	Character	1	
Agency Sub-element Code	Character	4	
Duty Station Code	Character	9	
Duty Station Description	Character	240	
Pay Plan	Character	2	
Grade	Character	2	
Occupational Series Code	Character	4	
Occupational Series Description	Character	240	

Data Item	Data Type	Length	Format
Position Title	Character	60	
Health Plan	Character	2	
Enrolment Code	Character	1	
RNO Code	Character	6	
RNO Description	Character	240	
Home Zip Code	Character	5	
Home Zip Extension	Character	4	
Building Number	Character	20	

4 Appendix A: Glossary of Terms

The following table defines the attributes used in the interface descriptions in this document.

Summary of Interface	
Attribute	**Description**
RTM Number	This is the number assigned and will be contained in the RTM
Purpose of Interface	A business description of the reason for the interface/extract/file transfer
Source System/Module and/or entity	This should map to one of the systems and modules listed in the diagram in Section 1.For example:CHRIS Personnel Action Processing
Source System Owner	This could be GSA, an external entity or an external customer agency
Receiving System	The system that is receiving the interface. If this is just a file being sent without direct interaction with a system (such as an extract), please note that fact
Receiving System Owner	This could be GSA, an external entity or an external customer agency
Type of File	Indicate the format of the file, e.g., comma-separated values (CVS), Extensible Markup Language (XML), text (TXT), etc.
Number of data elements	A count of how many fields are presented in the file/interface
Description of data elements in interface	List and/or description of the data elements (in layman's terms) in the file
Transfer Protocol	Description of the communication protocol used

Summary of Interface	
Attribute	**Description**
Production Frequency	Describe whether this interface is daily, weekly, monthly, etc...or a combination of those
Sequencing of interface	Describe when this interface occurs and whether there are any dependencies on other jobs and/or interfaces before this one can be produced and sent
Timing constraints	The specific time of day that the interface must be created and sent. Note if a deadline is a hard deadline or if it is flexible and/or negotiable
Approximate size of file	
Other Notes and Comments	

HRT2T Program

Interface Control Document between HR Shared Service Center and the Learning Management System Solution

Dated - June 2016

Interface Control Document between
HR Shared Service and Learning Management System

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Interface Control Document between
HR Shared Service and Learning Management System

1 Introduction

The Human Resources (HR) Shared Service Center (SSC) will be the new system that GSA's Office of Human Resources (OHRM) (and its customers) use to manage HR functions. This is an approved OPM SSC that will require interfaces with GSA systems. The HR SSC will include many primary core functions, but as it relates to this interface, the HR SSC will include the authoritative list of employees and their characteristics, and the time recording data for each employee for each pay period. There are multiple existing interfaces between GSA's current system Comprehensive Human Resources Integrated System (CHRIS) and GSA systems. These interfaces must be retained in the new system to avoid rework of the GSA systems.

GSA is contracting with a cloud provider for a Learning Management System (LMS) solution. Since the HR SSC will be the authoritative source of employee information, the HR SSC shall provide employee data to the LMS solution. While there will need to be an agreement between the HR SSC vendor and the LMS vendor, GSA will be the business owner of the data being provided.

Note - The actual file formats and fields are subject to change prior to implementation of the interface but are provided here for evaluation by the vendor of the complexity of the interfaces.

2 Scope

The data flows between the HR SSC and LMS will be primarily file based flows using SFTP. Please consult the details of each flow for confirmation of the protocols, data types, etc. The following table summarizes the data flows.

Interface Name	Description	Source System	Target System	Existing File?
Employee Data	Provide a full listing of employees	HR SSC	LMS	Y

3 Detailed Specification

Each flow described in the Scope section has its own specification.

3.1 Employee Data – HR SSC to LMS

3.1.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR033
Purpose of Interface	The LMS system needs a listing of employees so the employees can be assigned training plans and records.
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	LMS
Receiving System Owner	TBA
Type of File	ASCII with tilde (~) as the delimiter
Number of data elements	24
Description of data elements in interface	Employee data
Current Protocol Used	FTP – with PGP encryption; this can likely be changed to SFTP
Production Frequency	Twice a week
Sequencing of interface	N/A
Timing constraints	Not available
Approximate size of file	1200 - 1400 bytes * 12,000 employees
Other Notes and Comments	

3.1.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
First Name	Character	150	
Last Name	Character	150	
Middle Initial	Character	60	
User ID (Email Address)	Character	240	
User Type	Character	1	
Employee Number (Unique Generated ID)	Number	8	
Status	Character	6	
Service	Character	4	
Correspondence Code	Character	18	
Agency	Character	3	
Region	Character	15	
Library Access Authority (Default AB)	Character	2	
Position Title	Character	60	
Supervisor Name	Character	240	
Supervisor Email	Character	240	
Supervisor's Employee Number	Number	8	
Pay Plan	Character	2	
Job Series	Character	4	
Grade	Character	2	
Position Level (Supervisory Status)	Character	1	
Entry on Duty	Date	9,2	MM/DD/YYYY
Entry on Position	Date	9,2	MM/DD/YYYY
Supervisory Status (Derived 1- Supervisor 0 – Non Supervisor)	Character	9,2	

4 Appendix A: Glossary of Terms

The following table defines the attributes used in the interface descriptions in this document.

Summary Description	
Attribute	**Description**
RTM Number	This is the number assigned and will be contained in the RTM
Purpose of Interface	A business description of the reason for the interface/extract/file transfer
Source System/Module and/or entity	This should map to one of the systems and modules listed in the diagram in Section 1.For example:CHRIS Personnel Action Processing
Source System Owner	This could be GSA, an external entity or an external customer agency
Receiving System	The system that is receiving the interface. If this is just a file being sent without direct interaction with a system (such as an extract), please note that fact
Receiving System Owner	This could be GSA, an external entity or an external customer agency
Type of File	Indicate the format of the file, e.g., comma-separated values (CVS), Extensible Markup Language (XML), text (TXT), etc.
Number of data elements	A count of how many fields are presented in the file/interface
Description of data elements in interface	List and/or description of the data elements (in layman's terms) in the file
Transfer Protocol	Description of the communication(s) protocol(s) used
Production Frequency	Describe whether this interface is daily, weekly, monthly, etc...or a combination of those

Summary Description	
Attribute	**Description**
Security Considerations	Describe any special security requirements that are applicable to this interface/file
Sequencing of interface	Describe when this interface occurs and whether there are any dependencies on other jobs and/or interfaces before this one can be produced and sent
Timing constraints	The specific time of day with time zone that the interface must be created and sent. Note if a deadline is a hard deadline or if it is flexible and/or negotiable
Approximate size of file	Description of the sizing of the files
File Name Format	How the file should be named, if available.
Other Notes and Comments	

HRT2T Program

Interface Control Document between HR Shared Service Center and GSA National Staffing Application (NSA)

Dated - June 2016

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1 Introduction

The Human Resources (HR) Shared Service Center (SSC) will be the new system that GSA's Office of Human Resources (OHRM) (and its customers) use to manage HR functions. This is an approved OPM SSC that will require interfaces with GSA systems. The HR SSC will include many primary core functions, but as it relates to this interface, the HR SSC will include the authoritative list of employees and their characteristics, and the time recording data for each employee for each pay period. There are multiple existing interfaces between GSA's current Comprehensive Human Resources Integrated System (CHRIS) and GSA systems. These interfaces must be retained in the new system to avoid rework of the GSA systems.

The GSA National Staffing Application (NSA) assembles Human Resource, Payroll and Office of Personnel Management (OPM) pay table data to assist with a better understanding of current and forecasted GSA staffing costs. An interface is required to send current GSA employee data to the NSA application.

Note - The actual file formats and fields are subject to change prior to implementation of the interface but are provided here for evaluation by the vendor of the complexity of the interfaces.

2 Scope

The data flows between the HR SSC and PAR will be primarily file based flows using SFTP. Please consult the details of each flow for confirmation of the protocols, data types, etc. The following table summarizes the data flows. The final column shows where existing details are provided in subsequent sections. If details are not provided here, then the details must be defined as part of a T&M task to work out the final formats.

Interface Name	Description	Source System	Target System	Existing File?
Employee Data	Provide a full listing of GSA employees on a regular basis	HR SSC	NSA	Y
Personnel Action Data	Personnel actions from the current pay period	HR SSC	NSA	Y

3 Detailed Specification

Each flow described in the Scope section has its own specification.

3.1 GSA Employee Data – HR SSC to NSA

3.1.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR046
Purpose of Interface	The purpose of this interface is to provide a full listing of GSA employees to the NSA system
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	National Staffing Application (NSA)
Receiving System Owner	GSA
Type of File	ASCII
Number of data elements	61
Description of data elements in interface	Names, contact information, and pay codes for use in matching with costing information in NSA
Current Protocol Used	SFTP
Production Frequency	Biweekly
Sequencing of interface	N/A
Timing constraints	First Wednesday of the PP @ 5:00am Eastern
Approximate size of file	~ 2000 bytes * 12,000 employees
File Name Format	GSAEMPLROSTER
Other Notes and Comments	

3.1.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
Record Date (Pay Period End Date)	Date	8	YYYYMMDD
Region	Character	2	
Supervisor Social Security Number	Character	9	
Employee Number	Character	9	
Employee Social Security Number	Character	9	
Full Name	Character	75	
Email Address	Character	100	
Supervisory Status Code	Character	2	
Supervisory Status Description	Character	50	
Compute Early Retirement	Date	8	YYYYMMDD
Compute Optional Retirement	Date	8	YYYYMMDD
Date Arrived Personnel Office	Date	8	YYYYMMDD
Date Arrived Present Grade	Date	8	YYYYMMDD
Date Arrived Present Position	Date	8	YYYYMMDD
Occupational Series Code	Character	4	
Occupational Series Description	Character	100	
Office Symbol	Character	15	
Pos Organization Long Name	Character	500	
Position Title	Character	50	
PP-Series-Grade	Character	15	
Target Grade Or Level	Character	2	
Work Schedule Code	Character	2	
Work Schedule Description	Character	20	
Duty Station Code	Character	15	
Duty Station Name	Character	50	
Duty Station State or Country Desc	Character	50	
Telework Indicator	Character	2	
Telework Indicator Description	Character	50	
Step Or Rate	Character	2	
Pay Plan	Character	2	
Organization Name	Character	15	
Organization Agency Subelement Code	Character	4	

Data Item	Data Type	Length	Format
Grade Or Level	Character	2	
Latest Hire Date	Date	8	YYYYMMDD
Last Separation Date	Date	8	YYYYMMDD
Date Last Promotion	Date	8	YYYYMMDD
Retirement SCD	Date	8	YYYYMMDD
SCD Leave	Date	8	YYYYMMDD
WGI Date Due	Date	8	YYYYMMDD
WGI Last Equivalent Increase Date	Date	8	YYYYMMDD
Supervisor Last Name	Character	50	
Supervisor First Name	Character	50	
Supervisor Middle Name	Character	50	
Creditable Military Service	Character	10	
Position Sequence Number	Number	10	
PD Number	Character	20	
Adjusted Basic Pay	Number	8,2	
Retirement Plan Code	Character	3	
Retirement Plan Description	Character	45	
Employee Type	Character	15	
Appropriation Code 1	Character	50	
Bargaining Unit Status Code	Character	5	
Bargaining Unit Status Description	Character	50	
Last Name	Character	50	
First Name	Character	50	
Middle Name	Character	50	
Appointment Type Code	Character	3	
Appointment Type Description	Character	50	
Pay Table ID Code	Character	5	
Pay Table ID Description	Character	100	
Part-Time Hours Biweekly	Number	3	

3.2 GSA Personnel Actions – HR SSC to NSA

3.2.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR046
Purpose of Interface	The purpose of this interface is to provide a full listing of GSA employees to the NSA system
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	National Staffing Application (NSA)
Receiving System Owner	
Type of File	ASCII
Number of data elements	35
Description of data elements in interface	Names and action codes for GSA employees
Current Protocol Used	SFTP
Production Frequency	Biweekly
Sequencing of interface	N/A
Timing constraints	First Wednesday of the PP @ 5:00am
Approximate size of file	~ 600 bytes * 12,000 employees
File Name	GSAPERSACTION
Other Notes and Comments	

3.2.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
NOA Effective Date	Date	8	YYYYMMDD
Employee Number	Character	9	
SSN	Character	9	
NOA Family Code	Character	50	
First NOA Code	Character	5	
First NOA Desc	Character	100	
From Region	Character	2	
From Office Symbol	Character	15	
From Organization Name	Character	15	
To Region	Character	2	
To Office Symbol	Character	15	
To Organization Name	Character	15	
Agency Code Transfer To Desc	Character	100	
Agency Code Transfer From Desc	Character	100	
Reason For Separation	Character	5	
Reason For Separation Desc	Character	100	
Retirement Plan	Character	3	
Retirement Plan Desc	Character	45	
Full Name	Character	75	
From Pay Plan	Character	2	
From Occupational Series	Character	5	
From Grade Or Level	Character	2	
To Pay Plan	Character	2	
To Occupational Series	Character	5	
To Grade Or Level	Character	2	
First Name	Character	50	
Middle Name	Character	50	
Last Name	Character	50	
To Appropriation Code 1	Character	50	
From Position Control Number	Number	10	
To Position Control Number	Number	10	
From Position Agency Code/Subelement	Character	4	
To Position Agency Code / Subelement	Character	4	
From Position Title	Character	100	

Data Item	Data Type	Length	Format
To Position Title	Character	100	

4 Appendix A: Glossary of Terms

The following table defines the attributes used in the interface descriptions in this document.

Summary Interface Description	
Attribute	**Description**
RTM Number	This is the number assigned and will be contained in the RTM
Purpose of Interface	A business description of the reason for the interface/extract/file transfer
Source System/Module and/or entity	This should map to one of the systems and modules listed in the diagram in Section 1.For example:CHRIS Personnel Action Processing
Source System Owner	This could be GSA, an external entity or an external customer agency
Receiving System	The system that is receiving the interface. If this is just a file being sent without direct interaction with a system (such as an extract), please note that fact
Receiving System Owner	This could be GSA, an external entity or an external customer agency
Type of File	Indicate the format of the file, e.g., comma-separated values (CVS), Extensible Markup Language (XML), text (TXT), etc.
Number of data elements	A count of how many fields are presented in the file/interface
Description of data elements in interface	List and/or description of the data elements (in layman's terms) in the file
Transfer Protocol	Description of the communication protocol used

Summary Interface Description	
Attribute	**Description**
Production Frequency	Describe whether this interface is daily, weekly, monthly, etc or a combination of those
Security Considerations	Describe any special security requirements that are applicable to this interface/file
Sequencing of interface	Describe when this interface occurs and whether there are any dependencies on other jobs and/or interfaces before this one can be produced and sent
Timing constraints	The specific time of day that the interface must be created and sent. Note if a deadline is a hard deadline or if it is flexible and/or negotiable
Approximate size of transfer	Describes the computation to estimate the size of the file
Other Notes and Comments	

HRT2T Program

Interface Control Document between HR Shared Service Center and the OPM Online University Solution

Dated - June 2016

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Interface Control Document between
HR Shared Service and OPM OLU

1 Introduction

The Human Resources (HR) Shared Service Center (SSC) will be the new system that GSA's Office of Human Resources (OHRM) (and its customers) use to manage HR functions. This is an approved OPM SSC that will require interfaces with GSA systems. The HR SSC will include many primary core functions, but as it relates to this interface, the HR SSC will include the authoritative list of employees and their characteristics, and the time recording data for each employee for each pay period. There are multiple existing interfaces between GSA's current system Comprehensive Human Resources Integrated System (CHRIS) and GSA systems. These interfaces must be retained in the new system to avoid rework of the GSA systems.

OPM is one of the "customers" that use the GSA HR system. They have a Learning Management System (LMS) separate from the GSA LMS known within GSA as the OPM Online University (OPM OLU). The OPM OLU will require a feed of employees similar to but not identical to the GSA LMS employee feed.

Note - The actual file formats and fields are subject to change prior to implementation of the interface but are provided here for evaluation by the vendor of the complexity of the interfaces.

2 Scope

The data flows between the HR SSC and OPM OLU will be primarily file based flows using SFTP. Please consult the details of each flow for confirmation of the protocols, data types, etc. The following table summarizes the data flows.

Interface Name	Description	Source System	Target System	Existing File?
Employee Data	Provide a full listing of OPM employees only	HR SSC	OPM OLU	Y
Training Records	Provide training records to the HR system for submission to EHRI (need to use HR PII required by EHRI)	OPM OLU	HR SSC	Y

3 Detailed Specification

Each flow described in the Scope section has its own specification.

3.1 Employee Data – HR SSC to OPM OLU

3.1.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR041
Purpose of Interface	The OPM OLU system needs a listing of OPM employees so the employees can be assigned training plans and records.
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	OPM OLU – GoLearn.USALearning.net
Receiving System Owner	OPM
Type of File	ASCII with tilde (~) as the delimiter
Number of data elements	28
Description of data elements in interface	Employee data
Current Protocol Used	SFTP & PGP Encryption
Production Frequency	Daily M-F at 8:00am Eastern
Sequencing of interface	N/A
Timing constraints	Not available
Approximate size of file	1800-1900 bytes * number of OPM employees
Other Notes and Comments	

3.1.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
First Name	Character	150	
Last Name	Character	150	
Middle Initial	Character	60	
User ID (Email Address)	Character	240	
User Type	Character	1	
Employee Number (Unique Generated ID)	Number	8	
Status	Character	6	
Service	Character	4	
Correspondence Code	Character	18	
Agency	Character	3	
Region	Character	15	
Library Access Authority (Default AB)	Character	2	
Position Title	Character	60	
Supervisor Name	Character	240	
Supervisor Email	Character	240	
Supervisor's Employee Number	Number	8	
Pay Plan	Character	2	
Job Series	Character	4	
Grade	Character	2	
Position Level (Supervisory Status)	Character	1	
Entry on Duty	Date	9,2	MM/DD/YYYY
Entry on Position	Date	9,2	MM/DD/YYYY
Supervisory Status (Derived 1- Supervisor 0 – Non Supervisor)	Character	9,2	
Target Grade	Character	2	
Duty Station City	Character	240	
Duty Station State	Character	240	
Type of Appointment	Character	2	

3.2 Training Records – OPM OLU to HR SSC

3.2.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR041
Purpose of Interface	The OPM OLU system needs the HR system to provide personal information that is not available in the OLU system. This data is required by the EHRI interface and thus has to be provided by the HR system in the feed to EHRI.
Source System/Module and/or entity	OPM OLU
Source System Owner	OPM
Receiving System	HR SSC
Receiving System Owner	TBA
Type of File	ASCII with tilde (~) as the delimiter
Number of data elements	28
Description of data elements in interface	Training records
Current Protocol Used	SFTP & PGP Encryption
Production Frequency	Daily M-F at 8:00am Eastern
Sequencing of interface	N/A
Timing constraints	Not available
Approximate size of file	1700 - 1800 bytes * number of OPM employees
Other Notes and Comments	

3.2.2 Interface Detailed Specification

The following table provides the format of the data elements.

Interface Control Document between
HR Shared Service and OPM OLU

Data Item	Data Type	Length	Format
First Name	Character	150	
Last Name	Character	150	
Middle Initial	Character	60	
User ID (Email Address)	Character	240	
User Type	Character	1	
Employee Number (CHRIS Unique Generated ID)	Number	8	
Status	Character	6	
Service	Character	4	
Correspondence Code	Character	18	
Agency	Character	3	
Region	Character	15	
Library Access Authority (Default AB)	Character	2	
Position Title	Character	60	
Supervisor Name	Character	240	
Supervisor Email	Character	240	
Supervisor's Employee Number	Number	8	
Pay Plan	Character	2	
Job Series	Character	4	
Grade	Character	2	
Position Level (Supervisory Status)	Character	1	
Entry on Duty	Date	9,2	MM/DD/YYYY
Entry on Position	Date	9,2	MM/DD/YYYY
Supervisory Status	Character	9,2	(Derived 1- Supervisor 0 – Non Supervisor)
Supervisor Interface Out ID	Number	8	
Target Grade	Character	2	
Duty Station City	Character	240	
Duty Station State	Character	240	
Type of Appointment	Character	2	

4 Appendix A: Glossary of Terms

The following table defines the attributes used in the interface descriptions in this document.

Summary Description	
Attribute	**Description**
RTM Number	This is the number assigned and will be contained in the RTM
Purpose of Interface	A business description of the reason for the interface/extract/file transfer
Source System/Module and/or entity	This should map to one of the systems and modules listed in the diagram in Section 1.For example:CHRIS Personnel Action Processing
Source System Owner	This could be GSA, an external entity or an external customer agency
Receiving System	The system that is receiving the interface. If this is just a file being sent without direct interaction with a system (such as an extract), please note that fact
Receiving System Owner	This could be GSA, an external entity or an external customer agency
Type of File	Indicate the format of the file, e.g., comma-separated values (CVS), Extensible Markup Language (XML), text (TXT), etc.
Number of data elements	A count of how many fields are presented in the file/interface
Description of data elements in interface	List and/or description of the data elements (in layman's terms) in the file
Transfer Protocol	Description of the communication(s) protocol(s) used
Production Frequency	Describe whether this interface is daily, weekly, monthly, etc...or a combination of those
Security Considerations	Describe any special security requirements that are applicable to this interface/file

Interface Control Document between
HR Shared Service and OPM OLU

Summary Description	
Attribute	**Description**
Sequencing of interface	Describe when this interface occurs and whether there are any dependencies on other jobs and/or interfaces before this one can be produced and sent
Timing constraints	The specific time of day with time zone that the interface must be created and sent. Note if a deadline is a hard deadline or if it is flexible and/or negotiable
Approximate size of file	Description of the sizing of the files
File Name Format	How the file should be named, if available.
Other Notes and Comments	

HRT2T Program

Interface Control Document between HR Shared Service Center and Payroll, Accounting, and Reporting System (PAR)

Dated – June 2016

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1 Introduction

The Human Resources (HR) Shared Service Center (SSC) will be the new system that GSA's OHRM and its customers use to manage HR functions. This will be an approved OPM SSC that will require interfaces with GSA systems. The HR SSC will include many primary core functions, but as it relates to this interface, the HR SSC will include: the authoritative list of employees and their characteristics and the time recording data for each employee for each pay period. There are multiple existing interfaces between GSA's current system Comprehensive Human Resources Integrated System (CHRIS) and their Payroll, Accounting and Reporting (PAR) system. These interfaces must be retained with the HR SSC to avoid rework of the PAR system.

The PAR system is GSA's current Payroll processing system and the link between the HR system and GSA's accounting system. Modifications on PAR are to be kept to a minimum and thus the existing defined interfaces will be retained as much as possible.

Note - The actual file formats, fields, and transfer protocols are subject to change prior to implementation of the interface but are provided here for evaluation by the vendor of the complexity of the interfaces.

2 Scope

The data flows between the HR SSC and PAR will be primarily file based flows using SFTP. Please consult the details of each flow for confirmation of the protocols, data types, etc. The following table summarizes the data flows. The final column shows where existing details are provided in subsequent sections. If details are not provided here, then the details must be defined as part of a T&M task to work out the final formats.

Interface Name	Description	Source System	Target System	Existing File?
HR Actions Transfer	Provide an HR data feed to PAR for processing of a variety of action types	HR SSC	PAR	N (currently a DB feed)
Pay Schedules	HR passes all Federal Pay Schedules necessary to process pay.	HR SSC	PAR	N (currently a DB feed)
Bi-weekly pay data	Provide various current pay period data (pay and leave) processed in PAR for the current pay period	PAR	HR SSC	N (currently a DB feed)
Reverse Interface Pay (HR_RIP updates)	Provide NTE, WOP, GLI hours and days worked, along with indicator to say when PAR zero'd the WOP hours for the current pay period (data does include retroactive day/hrs that were processed in the current pay period)	PAR	HR SSC	N (currently a DB feed)

Interface Name	Description	Source System	Target System	Existing File?
3R's Incentive Pay	Provide 3R's incentives paid in PAR for the current pay period	PAR	HR SSC	N (currently a DB feed)
Awards Paid	Provides the HR system with information regarding award amounts paid for the current pay period	PAR	HR SSC	N (currently a DB feed)
Monthly Report of Federal Civilian Employment	Provides the HR system with payroll information required for SF113A monthly report of federal civilian employment	PAR	HR SSC	N (currently a DB feed)
Timesheet Data	Provide the SSN of the employee along with details about the time charged for each day.	Time and Attendance (T&A) SSC	PAR	N (currently a DB feed)
Reconciliation Data	Bi-weekly feed to reconcile data between the HR system and PAR	PAR	HR SSC	N (currently a DB feed)
Leave Data	Provide TA system with Leave Balance.	PAR	T&A SSC	N (currently a DB feed)

3 Detailed Specification

Each flow described in the Scope section has its own specification. Each file will be preceded by a Header row as shown in the next table.

Table 1: Header Row for each data file

Field Name	Allow Null?	Data Type
BATCH_ID	No	NUMBER(10)
COUNT	Yes	NUMBER(10)
PROCESS_DATE	Yes	DATE
TIMESTAMP	Yes	DATE

In addition, each file will end with a trailer row that contains the data in the next table. This row just confirms the count that is in the header row. If the count is different than the count in the header row OR the count of the rows processed, an error should be triggered. Note: the method of reporting errors will be discussed during fit-gap stages of the HRT2T project.

Table 2: Trailer row for each file

Field Name	Allow Null?	Data Type
COUNT	Yes	NUMBER(10)

3.1 Flow HR Actions Feed – HR SSC to PAR

3.1.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR029
Purpose of Interface	The HR system must provide a number of action processing feeds in a single file. The PAR system will process certain fields based on the Nature Action code. The interface detail section provides the fields that will be used for each Nature of Action type.
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	PAR
Receiving System Owner	GSA IT
Type of File	ASCII with tilde (~) delimiters; one record per line of the file with header and trailer record
Number of data elements	122
Description of data elements in interface	HR data that provides a number of different kinds of data. The record is ASCII delimited but fields can be blank for certain Nature of Action codes.
Transfer Protocol	SFTP
Production Frequency	Bi-weekly
Sequencing of interface	Records are processed in date/time sequence.
Timing constraints	
Approximate size of file	700 bytes * number of transactions (appx 20,000+ if processed for every employee - like mass furlough or pay adjustments)
Other Notes and Comments	

3.1.2 Interface Detailed Specifications (if applicable)

The following table shows the HR Transaction file layout excluding the header and trailer row discussed in the overview of Section 3.

Table 3: HR Actions record layout

Field Name	Null?	Data Type
HR_CYCLE_NO		NUMBER(8)
HR_SEQ		NUMBER(8)
HR_EXMIT_DATE		VARCHAR2(8)
HR_AGY	NOT NULL	VARCHAR2(3)
HR_SSN	NOT NULL	VARCHAR2(9)
HR_NOA_CD		VARCHAR2(3)
HR_NOA_EFF_DATE		VARCHAR2(8)
HR_NOA_001_002		VARCHAR2(3)
HR_NOA_001_002_EFF_DATE		VARCHAR2(8)
HR_PROCESS_DATE		VARCHAR2(8)
HR_BLOCK_CURR		VARCHAR2(5)
HR_NAME		VARCHAR2(27)
HR_DOB		VARCHAR2(8)
HR_TENURE		VARCHAR2(1)
HR_SCD		VARCHAR2(8)
HR_GLI_CD		VARCHAR2(2)
HR_RETIRE_CD		VARCHAR2(1)
HR_POSITION_TITLE		VARCHAR2(22)
HR_PAY_PLAN		VARCHAR2(2)
HR_OCCUP_CD		VARCHAR2(4)
HR_RETAIN_PAY_PLAN		VARCHAR2(2)
HR_RETAIN_GRADE		VARCHAR2(2)
HR_RETAIN_STEP		VARCHAR2(2)
HR_RETAIN_SCHED		VARCHAR2(4)
HR_RETAIN_PAY_BASIS		VARCHAR2(2)
HR_GRADE		VARCHAR2(2)
HR_STEP		VARCHAR2(2)
HR_ANN_SAL		VARCHAR2(8)
HR_PAY_BASIS		VARCHAR2(2)
HR_DUTY_STATION_STATE		VARCHAR2(2)
HR_DUTY_STATION_CITY		VARCHAR2(4)
HR_DUTY_STATION_COUNTY		VARCHAR2(3)
HR_AD_FUND_CD		VARCHAR2(3)
HR_AD_SERV_CD		VARCHAR2(1)
HR_AD_REGION		VARCHAR2(2)
HR_AD_ORG_CD		VARCHAR2(5)
HR_AD_BUDGT_ACT		VARCHAR2(2)
HR_AD_OBJ_CLASS		VARCHAR2(2)
HR_AD_FUNC_CD		VARCHAR2(3)
HR_AD_COST_ELEM		VARCHAR2(3)
HR_AD_WRK_CRAFT		VARCHAR2(3)
HR_WIG_BEG_DATE		VARCHAR2(8)
HR_NEXT_WIG_DATE		VARCHAR2(8)
HR_ORG_LOC		VARCHAR2(30)
HR_NTE_DATE		VARCHAR2(8)

Field Name	Null?	Data Type
HR_NTE_HRS_LIMIT		VARCHAR2(5)
HR_NTE_SAL_LIMIT		VARCHAR2(8)
HR_EOD		VARCHAR2(8)
HR_ANNUIT_AMT		VARCHAR2(8)
HR_ANNUIT_STATUS		VARCHAR2(1)
HR_TYPE_APPT		VARCHAR2(2)
HR_FT_PT_INT_CD		VARCHAR2(1)
HR_PT_PERM_CD		VARCHAR2(1)
HR_PRD		VARCHAR2(1)
HR_HBI_CD		VARCHAR2(3)
HR_HBI_TEMP_COST_CD		VARCHAR2(1)
HR_PREM_PAY_PCT_CD		VARCHAR2(1)
HR_PAY_SCHED_NO		VARCHAR2(4)
HR_SON		VARCHAR2(4)
HR_FLSA_CD		VARCHAR2(1)
HR_NF_COLA_PCT		VARCHAR2(6)
HR_NORMAL_HRS		VARCHAR2(3)
HR_FERS_COVG_CD		VARCHAR2(1)
HR_LOCALITY_PCT		VARCHAR2(6)
HR_LOCALITY_PAY		VARCHAR2(5)
HR_REGION		VARCHAR2(1)
HR_AGY_TRF_TO		VARCHAR2(2)
HR_SEVER_ENTITLED		VARCHAR2(8)
HR_NTE_DATE_LWOP		VARCHAR2(8)
HR_NTE_DATE_FURLOUGH		VARCHAR2(8)
HR_NTE_DATE_TEMP_PROM		VARCHAR2(8)
HR_NTE_DATE_DETAIL		VARCHAR2(8)
HR_NTE_DATE_SUSPENSION		VARCHAR2(8)
HR_NTE_DATE_SABBATICAL		VARCHAR2(8)
HR_NTE_DATE_LWP		VARCHAR2(8)
HR_AWARD_TYPE		VARCHAR2(2)
HR_AWARD_AMT		VARCHAR2(8)
HR_AWARD_DIST_CD		VARCHAR2(1)
HR_NEW_SSN		VARCHAR2(9)
HR_TSP_STATUS_CD		VARCHAR2(1)
HR_TSP_STATUS_DATE		VARCHAR2(8)
HR_TSP_SCD		VARCHAR2(8)
HR_TSP_EMP_RATE		VARCHAR2(6)
HR_TSP_EMP_AMT		VARCHAR2(6)
HR_TSP_DIST_C		VARCHAR2(6)
HR_TSP_DIST_F		VARCHAR2(6)
HR_TSP_DIST_G		VARCHAR2(6)
HR_TSP_VEST_CD		VARCHAR2(1)
HR_RETENT_ALLOW		VARCHAR2(8)
HR_STAFFING_DIFF		VARCHAR2(8)
HR_SUPV_DIFF		VARCHAR2(8)
HR_AWARD_HRS		VARCHAR2(2)
HR_POSITION_NTE_DATE		VARCHAR2(8)
HR_PRODUCT_DIST_CD		VARCHAR2(2)
HR_NTE_MAND_RETIRE_DATE		VARCHAR2(8)

Field Name	Null?	Data Type
HR_RETIRE_SCD		VARCHAR2(8)
HR_OPM_1635_CD		VARCHAR2(1)
HR_PROCESS_IND		VARCHAR2(1)
HR_TRNG_PROGRAM_ID		VARCHAR2(2)
HR_RECORD_DATETIME		VARCHAR2(22)
HR_TRANS_GEN_ID		VARCHAR2(1)
HR_UPDATE_RECORD_ID		VARCHAR2(15)
HR_GENDER_CD		VARCHAR2(1)
HR_NTE_DATE_TEMP_REASSIGN		VARCHAR2(8)
HR_STREET1		VARCHAR2(25)
HR_STREET2		VARCHAR2(14)
HR_CITY		VARCHAR2 (20)
HR_STATE		VARCHAR2 (5)
HR_ZIP1		VARCHAR2 (4)
HR_ZIP2		VARCHAR2 (4)
HR_INCENTIVE_CATEGORY		VARCHAR2 (1)
HR_PAYMENT_OPTION		VARCHAR2 (8)
HR_PAYMENT_BEGIN_DATE		VARCHAR2 (8)
HR_PAYMENT_END_DATE		VARCHAR2 (6)
HR_RETENTION_PCT		VARCHAR2 (8)
HR_INCENTIVE_AMT		VARCHAR2 (4)
HR_BARG_UNIT_STATUS_CD		VARCHAR2 (6)
HR_TSP_ROTH_EMP_RATE		VARCHAR2 (6)
HR_TSP_ROTH_EMP_AMT		VARCHAR2 (6)
HR_TSP_ROTH_CU_AMT		VARCHAR2 (3)
HR_LEGAL_AUTH_CD_1		VARCHAR2 (3)
HR_LEGAL_AUTH_CD_2		VARCHAR2 (3)

3.1.2.1 Appointments Fields

This includes all transactions with a Nature of Action (NOA) Code from 100-199. PAR will process a listing of Appointments since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Accounting Distribution Code
- Agency
- Annuitant Status
- Annuity Amount
- Bargaining Unit Status Code
- Block Number
- Capped Annual Salary
- City
- COLA Non Foreign
- Date of Birth
- Date of Last Equivalent Increase
- Date of Next WIG

- Duty Station Code
- Entered on Duty Date
- FERS Coverage Code
- FLSA Code
- FT/PT/Int Code
- Gender Code
- Government Life Insurance Code
- Grade
- HBI Temp Cost Code
- Health Benefits Insurance Code
- Locality Pay
- Locality Percent
- Name
- Nature of Action Code
- New SSN
- NOA Effective Date
- Normal Hours
- NTE Date
- NTE Hours Limit
- NTE Salary Limit
- Occupation Code
- OPM 1635 Flag
- Organization Location
- Part Time Permanent Code
- Pay Basis
- Pay Plan
- Pay Rate Determinant
- Pay Table Identifier
- Personnel Office Id
- Position NTE Date
- Position TitlePremium Pay Percent Code
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retained Pay Grade
- Retained Pay Pay Basis
- Retained Pay Pay Plan
- Retained Pay Step
- Retained Pay Table Identifier
- Retire SCD
- Retirement Code
- Retro Indicator
- Salary
- Service Computation Date
- Social Security Number
- State

- Step
- Street1
- Street2
- Tenure
- Type of Appointment
- Zip1
- Zip2

3.1.2.2 Return to Duty from Non-pay Status

This includes all transactions with a NOA code 280-293. PAR will process a listing of employees returning to duty since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Date of Birth
- Date of Next WIG (N/A for RETRO)
- Name
- Nature Of Action Code
- New SSN
- NOA Effective Date
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retro Indicator
- Service Computation Date
- Social Security Number

3.1.2.3 Separation from Employment

This includes all transactions with NOA code - 300 – 390, 970, and 978. PAR will process a listing of employees separating since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Agency Transferred To
- City
- Date of Birth
- Name
- Nature of Action Code
- New SSN
- NOA Effective Date
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retro Indicator

- Service Computation Date
- Severance Pay Entitled
- Social Security Number
- State
- Street1
- Street2
- Zip1
- Zip2

3.1.2.4 Placement in Nonpay and/or Nonduty Status

This includes all transactions with a NOA code 430-480 & 755. PAR will process a listing of employees placed in non-pay or non-duty status since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Date of Birth
- Name
- Nature of Action Code
- New SSN
- NOA Effective Date
- NTE Date - Furlough
- NTE Date - LWOP
- NTE Date - LWP
- NTE Date - Sabbatical
- NTE Date - Suspension
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retro Indicator
- Social Security Number

3.1.2.5 Conversions to Appointments

This includes all transactions with a NOA code 500 – 590. PAR will process a listing of employees whose appointments have been converted since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Accounting Distribution Code
- Agency
- Bargaining Unit Status Code
- Block Number
- Capped Annual Salary
- COLA Non Foreign
- Date of Birth

- Date of Last Equivalent Increase
- Date of Next WIG
- Duty Station Code
- FERS Coverage Code
- FLSA Code
- FT/PT/Int Code
- Government Life Insurance
- Grade
- HBI Temp Cost Code
- Health Benefits Insurance Code
- Locality Pay
- Locality Percent
- Name
- Nature of Action Code
- New SSN
- NOA Effective Date
- Normal Hours
- NTE Date
- NTE Hours Limit
- NTE Salary Limit
- Occupation Code
- OPM 1635 Flag
- Organization Location
- Part Time Permanent Code
- Pay Basis
- Pay Plan
- Pay Rate Determinant
- Pay Table Identifier
- Personnel Office Id
- Position NTE Date
- Position Title
- Premium Pay Percent Code
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retained Pay Grade
- Retained Pay Pay Basis
- Retained Pay Pay Plan
- Retained Pay Step
- Retained Pay Table Identifier
- Retire SCD
- Retirement Code
- Retro Indicator
- Salary
- Service Computation Date
- Social Security Number

- Step
- Tenure
- Type of Appointment

3.1.2.6 Position Changes

This includes all transactions with a NOA code 702 - 721, 740 - 750, 760 - 780, 782, 792, 866, and 781. PAR will process a listing of employees whose positions have changed, been extended and other miscellaneous actions since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Accounting Distribution Code
- Agency
- Bargaining Unit Status Code
- Block Number
- Capped Annual Salary
- COLA Non Foreign
- Date of Birth
- Date of Last Equivalent Increase
- Date of Next WIG
- Duty Station
- FERS Coverage Code
- FLSA Code
- FT/PT/INT Code
- Government Life Insurance Code
- Grade
- Locality Pay
- Locality Percent
- Name
- Nature of Action Code
- New SSN
- NOA Effective Date
- Normal Hours
- NTE Date
- NTE Date - Furlough
- NTE Date - LWOP
- NTE Date - Mand Retire
- NTE Date - Temp Promotion
- NTE Hours Limit
- NTE Salary Limit
- Occupation Code
- OPM 1635 Flag
- Organization Location
- Part Time Permanent Code
- Pay Basis
- Pay Plan

- Pay Rate Determinant
- Pay Table Identifier
- Personnel Office Id
- Position NTE Date
- Position Title
- Premium Pay Percent Code
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retained Pay Grade
- Retained Pay Pay Basis
- Retained Pay Pay Plan
- Retained Pay Step
- Retained Pay Table Identifier
- Retention Allowance
- Retirement Code
- Retro Indicator
- Salary
- Social Security Number
- Step
- Tenure
- Type of Appointment

3.1.2.7 Employee Details

This includes all transactions with a NOA code 730 - 732, 930 – 932. PAR will process a listing of employees who have been “detailed” since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Detail NTE Date
- FLSA Code
- Nature of Action Code
- NOA Effective Date
- Personnel Office Id
- Position NTE Date
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retro Indicator
- Social Security Number

3.1.2.8 Realignments

This includes all transactions with a NOA code 790 & 901. PAR will process a listing of employees who have been realigned since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Accounting Distribution Code
- Agency
- Block Number
- Date of Birth
- Name
- Nature of Action Code
- New SSN
- NOA Effective Date
- Organization Location
- Personnel Office Id
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retro Indicator
- Social Security Number

3.1.2.9 Change in Data Element, Retirement Code Changes, Elected Full Living Benefits, Elected Partial Living Benefits, and GLI Change

This includes all transactions with a NOA code 800, 803, 805, 806, 880, 881. PAR will process a listing of employees who have had a variety of changes since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Annuitant Status
- Bargaining Unit Status Code
- Date of Birth
- Date of Next WIG
- FERS Coverage Code
- FLSA Code
- Government Life Insurance Code
- Name
- Nature of Action Code
- New SSN
- NOA Effective Date
- HIST_NTE.NTE Date
- HIST_NTE.NTE Hours Limit
- HIST_NTE.NTE Salary Limit

- Occupation Code
- Organization Location
- Pay Rate Determinant
- Personnel Office Id
- Position Title
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retirement Code
- Retro Indicator
- Service Computation Date
- Social Security Number
- Tenure
- TSP SCD
- Type of Appointment

3.1.2.10 Bonuses and Awards

This includes all transactions with a NOA code 815, 816, 825, 840-848, 849, 872 - 879, 885, 886, 887, 889, 990, 993 & 998. PAR will process a listing of employees who have received recruitment bonuses, relocation bonuses, time off awards, and other awards since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Accounting Distribution Code
- Agency
- Award Amount
- Award Distribution Code
- Award Hours
- Award Type
- Nature of Action Code
- NOA Effective Date
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retro Indicator
- Social Security Number

3.1.2.11 Increases and pay adjustments

This includes all transactions with a NOA code 810, 818, 819, 867 - 868, 888 & 891 – 899. PAR will process a listing of employees who have received change in allowance/ differential, authorized AUO, availability pay, denial of WIG, merit increase, quality step increase, WIG, pay adjustment, step adjustment, and geographic adjustment since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Capped Annual Salary
- COLA Non Foreign
- Date of Birth
- Date of Last Equivalent Increase
- Date of Next WIG
- Duty Station
- Grade
- Locality Pay
- Locality Percent
- Name
- Nature of Action Code
- New SSN
- NOA Effective Date
- Occupation Code
- Pay Basis
- Pay Plan
- Pay Rate Determinant
- Pay Table Identifier
- Premium Pay Percent Code
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retained Pay Grade
- Retained Pay Pay Basis
- Retained Pay Pay Plan
- Retained Pay Step
- Retained Pay Table Identifier
- Retention Allowance
- Retro Indicator
- Salary
- Service Computation Date
- Social Security Number
- Staffing Differential
- Step
- Supervisory Differential

3.1.2.12 TSP Adjustments

This includes all transactions with a NOA code 911 & 912. PAR will process a listing of employees who have TSP adjustments since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date

- Agency
- Nature of Action Code
- NOA Effective Date
- Process Date
- Process Time
- Product Dist Code
- Region Code
- Retro Indicator
- Social Security Number
- TSP Catchup Amount
- TSP Employee Amount
- TSP Employee Rate
- TSP Roth Employee Rate
- TSP Roth Employee Amount
- TSP Roth Catchup Amount
- TSP SCD
- TSP Status Code
- TSP Status Date
- TSP Vest Code

3.1.2.13 Miscellaneous

This includes all transactions with a NOA code 991. PAR will process a listing of employees who have had miscellaneous changes since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Annuity Amount
- Cola Non Foreign (N/A RETRO)
- Date of Birth
- Date of Last Equivalent Increase
- Date of Next WIG (N/A RETRO)
- Entered on Duty Date
- FERS Coverage Code
- Gender Code
- Name
- Nature of Action Code
- NOA Effective Date
- OPM 1635 Flag
- Organization Location
- Part Time Permanent Code
- Premium Pay Percent Code
- Process Date
- Process Time
- Product Dist Code
- Retire SCD

- Retro Indicator
- Severance Pay Entitled
- Social Security Number

3.1.2.14 Position Title / Position Number

This includes all transactions with a NOA code 995. PAR will process a listing of employees who have had changes in position title / number since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Nature of Action Code
- NOA Effective Date
- Position Title (N/A RETRO)
- Process Date
- Process Time
- Retro Indicator
- Social Security Number

3.1.2.15 Health Benefits

This includes all transactions with a NOA code 996. PAR will process a listing of employees who have had changes in health benefits since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- HBI Temp Cost Code
- Health Benefits Insurance Code
- Nature of Action Code
- NOA Effective Date
- Process Date
- Process Time
- Retro Indicator
- Social Security Number

3.1.2.16 Recruitment, Relocation, and Retention

This includes all transactions with a NOA code 815, 816, 827. PAR will process a listing of employees who have had changes in recruitment, retention, and relocation since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Incentive Amt

- Incentive Category
- Nature of Action Code
- NOA Effective Date
- Paymt Begin Date
- Paymt End Date
- Paymt Option
- Process Date
- Process Time
- Retention Pct
- Retro Indicator
- Social Security Number

3.1.2.17 SCD

This includes all transactions with a NOA code 882. PAR will process a listing of employees in SCD since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Date of Birth
- Name
- Nature of Action Code
- New SSN
- NOA Effective Date
- Process Date
- Process Time
- Retire SCD
- Retro Indicator
- Service Computation Date
- Social Security Number
- TSP SCD (N/A RETRO)

3.1.2.18 Work Schedule

This includes all transactions with a NOA code 615, 616, and 781. PAR will process a listing of employees who have had changes in work schedules since the last batch interface from the fields in the HR Transaction file in the following list.

- 001/002 Nature of Action Code
- 001/002 NOA Effective Date
- Agency
- Date of Birth
- FT/PT/Int Code
- Government Life Insurance Code
- HIST_HBI.HBI Temp Cost Code
- HIST_HBI.Health Benefits Insurance Code
- Name

- Nature of Action Code
- New SSN
- NOA Effective Date
- Normal Hours
- Part Time Permanent Code
- Process Date
- Process Time
- Retro Indicator
- Service Computation Date
- Social Security Number
- TSP SCD (N/A RETRO)
- Annuitant Status

3.2 Pay Schedules – HR SSC to PAR

3.2.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR029
Purpose of Interface	PAR requires the Federal Pay Schedules to be provided for processing the payroll.
Source System/Module and/or entity	HR SSC
Source System Owner	TBD - New HR System
Receiving System	PAR
Receiving System Owner	GSA IT
Type of File	ASCII with tilde (~) delimiters; one record per line of the file with header and trailer record
Number of data elements	8
Description of data elements in interface	Government-wide salaries & wages pay tables based on Pay Plan, Pay Schedule and Effective Dates for Federal Employees
Transfer Protocol	SFTP
Production Frequency	Daily / As Needed when a change occurs; must be loaded before NOA processing that involves a change
Sequencing of interface	MUST be loaded before NOA processing that involves a change

Summary Interface Description	
Attribute	**Description**
Timing constraints	MUST be loaded prior the the processing of personnel actions or will reject with invalid salary rates. Therefore, should be sent with the daily HR transaction files (if applicable) NOTE: MUST be sent before the annual pay increase actions are processed.
Approximate size of file	43 bytes per record * maximum 20,000 records
Other Notes and Comments	Size of file will vary based on number of changes. GS pay plans typically update 1st full pay period of new Calendar Year and WG pay plans typically update 1st full pay period of new Fiscal Year

3.2.2 Interface Detailed Specifications (if applicable)

The following table shows the PAR MISC.HR_PAY_SCHED_TABLE data fields.

Table 4: Payroll HR Pay Schedule record layout

Name	Null?	Type
HR_PS_NO	N	VARCHAR2 (4 Byte)
HR_PS_EFF_DATE	N	DATE
HR_PS_GRADE	N	VARCHAR2 (2 Byte)
HR_PS_STEP	N	VARCHAR2 (2 Byte)
HR_PS_ANN_SAL	N	NUMBER (8,2)
HR_PS_PAY_PLAN	N	VARCHAR2 (2 Byte)
HR_PS_HRLY_RATE	N	NUMBER (5,2)
HR_PS_PROCESS_REC	N	VARCHAR2 (1 Byte)

3.3 Bi-weekly pay data – PAR to HR SSC (chris_bw.sql)

3.3.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR029
Purpose of Interface	This information is provided to reconcile data between HR and Payroll.
Source System/Module and/or entity	PAR

Summary Interface Description	
Attribute	**Description**
Source System Owner	GSA IT
Receiving System	HR SSC
Receiving System Owner	TBD
Type of File	ASCII with tilde (~) delimiters; one record per line of the file with header and trailer record
Number of data elements	110
Description of data elements in interface	Accounting and payroll data to be used by the HR system to reconcile information in HR.
Transfer Protocol	SFTP
Production Frequency	Bi-weekly
Timing constraints	Pay week Thursday
Approximate size of file	500 – 600 bytes per employee * 20,000+ employees
Other Notes and Comments	

3.3.2 Interface Detailed Specifications (if applicable)

The following table shows the fields to be included in the Bi-Weekly Pay data file excluding the Header and Trailer record described in Section 3.

Table 5: Bi-weekly Pay record layout

Name	Null?	Type
BW_ACCTG_DIST_FUND_CD		VARCHAR2 (3)
BW_ACCTG_DIST_SERV_CD		VARCHAR2 (1)
BW_ACCTG_DIST_REGION		VARCHAR2 (2)
BW_ACCTG_DIST_ORG_CD		VARCHAR2 (5)
BW_ACCTG_DIST_BUDGT_ACT		VARCHAR2 (2)
BW_ACCTG_DIST_OBJ_CLASS		VARCHAR2 (2)
BW_ACCTG_DIST_FUNC_CD		VARCHAR2 (3)
BW_ACCTG_DIST_COST_ELEM		VARCHAR2 (3)
BW_ACCTG_DIST_WRK_CRAFT		VARCHAR2 (3)

Name	Null?	Type
BW_AGY		VARCHAR2 (3)
BW_AGY_TRF_TO		VARCHAR2 (3)
BW_ANN_LV_EARN_BAL		NUMBER (5,1)
BW_ANN_SAL_HRLY_RATE		NUMBER (8,2)
BW_ANNUIT_AMT		NUMBER (8,2)
BW_ANNUIT_STATUS		VARCHAR2 (1)
BW_BLOCK_NO		VARCHAR2 (5)
BW_BOND_DENOM_CD		VARCHAR2 (1)
BW_CHARITY_CD_1		VARCHAR2 (4)
BW_CHARITY_CD_2		VARCHAR2 (4)
BW_CHARITY_CD_3		VARCHAR2 (4)
BW_CK_DIST_CD		VARCHAR2 (2)
BW_DAYS_WRK_SLI		NUMBER (4)
BW_DOB		DATE
BW_DUTY_STATION_STATE		VARCHAR2 (2)
BW_DUTY_STATION_CITY		VARCHAR2 (4)
BW_DUTY_STATION_COUNTY		VARCHAR2 (3)
BW_EOD		DATE
BW_FERS_COVG_CD		VARCHAR2 (1)
BW_FLSA_CD		VARCHAR2 (1)
BW_FT_PT_INT_CD		VARCHAR2 (1)
BW_GLI_CD		VARCHAR2 (2)
BW_GRADE		VARCHAR2 (2)
BW_HBI_PLAN		VARCHAR2 (3)
BW_LOCALITY_PAY		NUMBER (5)
BW_LOCALITY_PERCENT		NUMBER (6,5)
BW_LV_CAT		VARCHAR2 (1)
BW_MIL_LV_DAYS_CO		NUMBER (4)
BW_MIL_LV_DAYS_USED		NUMBER (4)
BW_NAME		VARCHAR2 (27)
BW_NEXT_WGI_DATE		DATE
BW_NF_COLA_PCT		NUMBER (6,5)
BW_NORMAL_HRS		VARCHAR2(3)
BW_NTE_DATE		DATE
BW_NTE_DATE_DETAIL		DATE
BW_NTE_DATE_TEMP_PROM		DATE
BW_NTE_HRS_LIMIT		NUMBER (5,1)
BW_NTE_SAL_LIMIT		NUMBER (8,2)
BW_NW_UNION_CDE_1		VARCHAR2 (4)
BW_NW_UNION_CDE_2		VARCHAR2 (4)
BW_OCCUP_CD		VARCHAR2 (4)
BW_ORG_LOC		VARCHAR2 (30)
BW_PAY_BASIS		VARCHAR2 (2)
BW_PAY_PLAN		VARCHAR2 (2)
BW_PAY_STATUS_CD		VARCHAR2 (1)
BW_PAY_TABLE_ID		VARCHAR2 (4)
BW_POID		VARCHAR2 (4)
BW_POSITION_NTE_DATE		DATE
BW_PRD		VARCHAR2 (1)
BW_PREM_PAY_PCT_CD		VARCHAR2 (1)

Name	Null?	Type
BW_PT_PERM_CD		VARCHAR2 (1)
BW_REGION		VARCHAR2 (1)
BW_RETAIN_GRADE		VARCHAR2 (2)
BW_RETAIN_PAY_BASIS		VARCHAR2 (2)
BW_RETAIN_PAY_PLAN		VARCHAR2 (2)
BW_RETAIN_PAY_TBL_ID		VARCHAR2 (4)
BW_RETAIN_STEP		VARCHAR2 (2)
BW_RETENT_ALLOW_ANN_AMT		NUMBER (8,2)
BW_RETIRE_CD		VARCHAR2 (1)
BW_SCD		DATE
BW_SEVER_ENTITLED		NUMBER (8,2)
BW_SHARED_LV_ACTIVE_CD		VARCHAR2 (1)
BW_SHD_LV_CUM_HRS_RECV		NUMBER (5,1)
BW_SHD_LV_CUM_HRS_USED		NUMBER (5,1)
BW_SICK_LV_BAL		NUMBER (5,1)
BW_SSN		VARCHAR2 (9)
BW_STAFF_DIFF_ANN_AMT		NUMBER (8,2)
BW_STEP		VARCHAR2 (2)
BW_SUBELEMENT_CD		VARCHAR2 (2)
BW_SUPV_DIFF_ANN_AMT		NUMBER (8,2)
BW_TENURE		VARCHAR2 (1)
BW_TSP_DIST_C		NUMBER (11,5)
BW_TSP_DIST_F		NUMBER (6,5)
BW_TSP_DIST_G		NUMBER (6,5)
BW_TSP_EMP_AMT		NUMBER (6,2)
BW_TSP_EMP_RATE		NUMBER (6,5)
BW_TSP_SCD		DATE
BW_TSP_SEP_CD		VARCHAR2 (1)
BW_TSP_SEP_DATE		DATE
BW_TSP_STATUS_CD		VARCHAR2 (1)
BW_TSP_STATUS_DATE		DATE
BW_TSP_VEST_CD		VARCHAR2 (1)
BW_TYPE_APPT		VARCHAR2 (2)
BW_UNION_CDE_1		VARCHAR2 (4)
BW_UNION_CDE_2		VARCHAR2 (4)
BW_WGI_BEG_DATE		DATE
BW_WOP_AWOL_SLI		NUMBER (5,1)
BW_WOP_LWOP_SLI		NUMBER (5,1)
BW_WOP_YTD_AWOL		NUMBER (5,1)
BW_WOP_YTD_LWOP		NUMBER (5,1)
BW_YTD_ANN_LV_USED		NUMBER (5,1)
BW_YTD_SICK_LV_USED		NUMBER (5,1)
BW_PAY_PERIOD		VARCHAR2 (2)
BW_PAY_PERIOD_END_DATE		DATE
BW_LAST_UPDATE_DATE		DATE
BW_LAST_UPDATE_USER_NAME		VARCHAR2 (15)
BW_RECORD_PROCESS_IND		VARCHAR2 (1)
BW_CYCLE_NO		NUMBER (8)
BW_HBI_PRE_TAX_IND		VARCHAR2 (1)
BW_NTE_DATE_TEMP_REASSIGN		DATE

Name	Null?	Type
BW_BARG_UNIT_STATUS_CD		VARCHAR2 (4)
BW_TSP_ROTH_EMP_AMT	Y	NUMBER (8,2)
BW_TSP_ROTH_EMP_RATE	Y	NUMBER (6,5)
BW_TSP_ROTH_CU_DED_PER_PP	Y	NUMBER (8,2)
BW_TSP_ELIG_DATE	Y	DATE

3.4 Reverse Interface Pay – PAR to HR SSC (chris_rip.sql)

3.4.1 Interface Overview

Summary of Interface	
Attribute	**Description**
RTM Number	GNFR029
Purpose of Interface	This is a bi-weekly payroll information on intermittent employees, employees on Leave-Without-Pay (LWOP), and not-to-exceed information.
Source System/Module and/or entity	PAR
Source System Owner	GSA IT
Receiving System	HR SSC
Receiving System Owner	TBD
Type of File	ASCII with tilde (~) delimiters; one record per line of the file with header and trailer record
Number of data elements	27
Description of data elements in interface	Provide NTE, WOP, GLI hours and days worked, along with indicator to say when PAR zero'd the WOP hours for the current pay period (data does include retroactive day/hrs that were processed in the current pay period)
Transfer Protocol	SFTP
Production Frequency	Bi-weekly
Sequencing of interface	
Timing constraints	Pay Week Thursday
Approximate size of file	300 bytes * number of employees involved
Other Notes and Comment	

3.4.2 Interface Detailed Specifications (if applicable)

The following table provides the list of fields to be supplied in the incentives file excluding the Header and Trailer records described in Section 3.

Table 6: Reverse Interface Pay record layout

NAME	Null Allowed?	Type / Size
RIP_AGY		VARCHAR2 (3)
RIP_REGION		VARCHAR2 (2)
RIP_SSN	No	VARCHAR2 (9)
RIP_NAME		VARCHAR2 (27)
RIP_WGI_LWOP		NUMBER (5,1)
RIP_WGI_LWOP_AMENDED		NUMBER (5,1)
RIP_NTE_HRS_REMAINING		NUMBER (5,1)
RIP_NTE_SAL_REMAINING		NUMBER (8,2)
RIP_INT_DAYS_WORKED		NUMBER (5)
RIP_INT_DAYS_WORKED_AMENDED		NUMBER (5)
RIP_INT_HOURS_WORKED_SCD		NUMBER (4,1)
RIP_POID		VARCHAR2 (4)
RIP_PAY_PERIOD		VARCHAR2 (2)
RIP_PP_END_DATE		DATE
RIP_POSITION_ORG		VARCHAR2 (30)
RIP_CYCLE_NO		NUMBER (8)
RIP_LAST_UPDATE_DATE		DATE
RIP_LAST_UPDATE_USER_NAME		VARCHAR2 (15)
RIP_RECORD_PROCESS_IND		VARCHAR2 (1)
RIP_MODULE_PROCESS_IND		VARCHAR2 (60)
RIP_SEQ_NO		NUMBER (8)
RIP_RECORD_DATETIME		VARCHAR2 (22)
RIP_ELEMENT_ENTRY_ID		NUMBER (15)
RIP_WOP_ADJ_IND		NUMBER (1)
RIP_DAYS_WRK_ADJ_IND		NUMBER (1)
RIP_NTE_SAL_LIMIT		NUMBER (8,2)
RIP_NTE_HOURS_LIMIT		NUMBER (5,1)

3.5 3R's Incentive Pay – PAR to HR SSC (hr_incent.sql)

3.5.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR029
Purpose of Interface	Provides the HR system with information regarding amounts paid based on 3R's (Relocation, Retention, Recruitment) incentive payments for the current pay period.

Summary Interface Description	
Attribute	**Description**
Source System/Module and/or entity	PAR
Source System Owner	GSA IT
Receiving System	HR SSC
Receiving System Owner	TBD
Type of File	ASCII with tilde (~) delimiters; one record per line of the file with header and trailer record
Number of data elements	18
Description of data elements in interface	Incentive pay period information
Transfer Protocol	SFTP
Production Frequency	Bi-weekly
Sequencing of interface	
Timing constraints	Pay Week Thursday
Approximate size of file	~180 bytes per record * number of incentives for the pay period
Other Notes and Comments	

3.5.2 Interface Detailed Specifications (if applicable)

The following table provides the list of fields to be supplied in the incentives file. The file will be tilde (~) delimited with an end of line character at the end of each record.

Table 7: 3R's Incentive Pay record layout

Field Name	Allow Null?	Data Type
AGENCY_CODE	No	NUMBER(3)
EMPLOYEE_NAME	No	VARCHAR(27)
SSN	No	VARCHAR(9)
INCENTIVE_NOA_CODE	No	VARCHAR(3)
INCENTIVE_PAYMENT_CATEGORY	No	VARCHAR(3)
INCENTIVE_AMOUNT	No	NUMBER(15,5)
PAY_PERIOD	No	VARCHAR(2)
PAY_PERIOD_END_DATE	No	DATE
LAST_UPDATE_USER_NAME	No	VARCHAR(15)

RECORD_PROCESS_IND	No	VARCHAR(1)
CYCLE_NO	No	NUMBER(8)
LAST_UPDATE_DATE	Yes	DATE

3.6 Awards Paid – PAR to HR SSC (chris_award.sql)

3.6.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR029
Purpose of Interface	Provides the HR system with information regarding award amounts paid for the current pay period.
Source System/Module and/or entity	PAR
Source System Owner	GSA IT
Receiving System	HR SSC
Receiving System Owner	TBD
Type of File	ASCII with tilde (~) delimiters; one record per line of the file with header and trailer record
Number of data elements	38
Description of data elements in interface	Awards paid pay period information
Transfer Protocol	SFTP
Production Frequency	Bi-weekly
Sequencing of interface	
Timing constraints	Pay Week Thursday
Approximate size of file	~180 bytes per record * number of award for the pay period
Other Notes and Comments	

3.6.2 Interface Detailed Specifications (if applicable)

The following table provides the list of fields to be supplied in the incentives file with the exception of the Header and Trailer records that will be used as described in Section 3.

Table 8: Awards Paid record layout

Field Name	Allow Null?	Data Type
AWD_AGY	Y	VARCHAR2 (3 Byte)
AWD_REGION	Y	VARCHAR2 (1 Byte)
AWD_SSN	N	VARCHAR2 (9 Byte)
AWD_NAME	Y	VARCHAR2 (27 Byte)
AWD_AWARD_AMT_NET	Y	NUMBER (8,2)
AWD_AWARD_AMT_GROSS	Y	NUMBER (8,2)
AWD_HOURS	Y	NUMBER (2)
AWD_AWARD_DATE	Y	DATE
AWD_AWARD_REFERENCE_NO	Y	VARCHAR2 (9 Byte)
AWD_AWARD_TYPE	N	VARCHAR2 (2 Byte)
AWD_DIST_CD	Y	VARCHAR2 (1 Byte)
AWD_AD_FUND_CD	Y	VARCHAR2 (3 Byte)
AWD_AD_SERV_CD	Y	VARCHAR2 (1 Byte)
AWD_AD_REGION	Y	VARCHAR2 (2 Byte)
AWD_AD_ORG_CD	Y	VARCHAR2 (5 Byte)
AWD_AD_BUDGT_ACT	Y	VARCHAR2 (2 Byte)
AWD_AD_OBJ_CLASS	Y	VARCHAR2 (2 Byte)
AWD_AD_FUNC_CD	Y	VARCHAR2 (3 Byte)
AWD_AD_COST_ELEM	Y	VARCHAR2 (3 Byte)
AWD_AD_WRK_CRAFT	Y	VARCHAR2 (3 Byte)
AWD_POSITION_ORG_LOC	N	VARCHAR2 (30 Byte)
AWD_AUTHORITY_CD	Y	VARCHAR2 (30 Byte)
AWD_NOA_CD	Y	VARCHAR2 (3 Byte)
AWD_NOA_EFF_DATE	N	DATE
AWD_NOA_001_002	Y	VARCHAR2 (3 Byte)
AWD_NOA_001_002_EFF_DATE	Y	DATE
AWD_APPROVING_OFFICIAL	N	VARCHAR2 (27 Byte)
AWD_PP_END_DATE	Y	DATE
AWD_RECORD_PROCESS_IND	Y	VARCHAR2 (1 Byte)
AWD_SEQ_NO	Y	NUMBER (8)
AWD_CYCLE_NO	Y	NUMBER (8)
AWD_LAST_UPDATE_DATE	Y	DATE
AWD_LAST_UPDATE_USER_NAME	Y	VARCHAR2 (15 Byte)
AWD_RECORD_DATETIME	Y	VARCHAR2 (22 Byte)
AWD_ELEMENT_ENTRY_ID	Y	NUMBER (15)
AWD_PA_REQUEST_ID	Y	NUMBER (15)
AWD_ERROR_CD	Y	VARCHAR2 (5 Byte)
AWD_JUSTIFICATION	Y	VARCHAR2 (4000 Byte)

3.7 Monthly Report of Federal Civilian Employment - PAR to HR SSC (month_end_cycle_exe.sql)

3.7.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR029
Purpose of Interface	Provides the HR system with payroll information required for SF113A monthly report of federal civilian employment
Source System/Module and/or entity	PAR
Source System Owner	GSA IT
Receiving System	HR SSC
Receiving System Owner	TBD
Type of File	ASCII with tilde (~) delimiters; one record per line of the file with header and trailer record
Number of data elements	26
Description of data elements in interface	Gross Pay, Lump Sum Amt, Work Schedule Code, Leave Category, Region, Organization and Accounting Data -- at employee level
Transfer Protocol	SFTP
Production Frequency	Monthly
Sequencing of interface	
Timing constraints	Month End Pay Period - Pay Week Thursday
Approximate size of file	168 per record * 20,000 + employees
Other Notes and Comments	

3.7.2 Interface Detailed Specifications (if applicable)

The following table provides the list of fields to be supplied in the incentives file with the exception of the Header and Trailer records described in Section 3.

Table 9: SF113A record layout

Field Name	Allow Null?	Data Type
SF113A_ACCTG_DIST_FUND_CD	Y	VARCHAR2 (3 Byte)
SF113A_ACCTG_DIST_SERV_CD	Y	VARCHAR2 (1 Byte)
SF113A_ACCTG_DIST_REGION	Y	VARCHAR2 (2 Byte)
SF113A_ACCTG_DIST_ORG_CD	Y	VARCHAR2 (5 Byte)
SF113A_ACCTG_DIST_BUDGT_ACT	Y	VARCHAR2 (2 Byte)
SF113A_ACCTG_DIST_OBJ_CLASS	Y	VARCHAR2 (2 Byte)
SF113A_ACCTG_DIST_FUNC_CD	Y	VARCHAR2 (3 Byte)
SF113A_ACCTG_DIST_COST_ELEM	Y	VARCHAR2 (3 Byte)
SF113A_ACCTG_DIST_WRK_CRAFT	Y	VARCHAR2 (3 Byte)
SF113A_FT_PT_INT_CD	Y	VARCHAR2 (1 Byte)
SF113A_AGY	Y	VARCHAR2 (3 Byte)
SF113A_BLOCK_NO	Y	VARCHAR2 (5 Byte)
SF113A_BW_113A_GROSS	Y	NUMBER (8,2)
SF113A_BW_113A_HRS_WRK_IND	Y	VARCHAR2 (1 Byte)
SF113A_BW_113A_LUMP_SUM_AMT	Y	NUMBER (8,2)
SF113A_NAME	Y	VARCHAR2 (27 Byte)
SF113A_ORG_LOC	Y	VARCHAR2 (30 Byte)
SF113A_POID	Y	VARCHAR2 (4 Byte)
SF113A_REGION	Y	VARCHAR2 (1 Byte)
SF113A_SSN	Y	VARCHAR2 (9 Byte)
SF113A_LV_CAT	Y	VARCHAR2 (1 Byte)
SF113A_MONTH_YEAR	Y	VARCHAR2 (6 Byte)
SF113A_LAST_UPDATE_DATE	Y	DATE
SF113A_LAST_UPDATE_USER_NAME	Y	VARCHAR2 (15 Byte)
SF113A_RECORD_PROCESS_IND	Y	VARCHAR2 (1 Byte)
SF113A_CYCLE_NO	Y	NUMBER (8)

3.8 Timesheet Data – HR SSC (T&A) to PAR

3.8.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR029
Purpose of Interface	The T&A system must provide time and attendance records to the Payroll system prior to the payroll cycle.

Summary Interface Description	
Attribute	**Description**
Source System/Module and/or entity	HR SSC T&A
Source System Owner	TBD
Receiving System	PAR
Receiving System Owner	GSA IT
Type of File	ASCII with tilde (~) delimiters; one record per line of the file with header and trailer record
Number of data elements	
Description of data elements in interface	Days/Hours worked, leave used, FT/PT status, AWS status, Separated (per TA - but HR is source of record)
Transfer Protocol	SFTP
Production Frequency	Daily(amendments) & Bi-weekly(primary timecards)
Sequencing of interface	
Timing constraints	Daily to pull in amended timecards PayCycle primary timecards - 1st Monday of current pay period - Pay Week Monday
Approximate size of file	IND –> 155 bytes per record – one record per 20,000+ employees DATA -> 72 bytes per record – one record per day per 20,000 + employees
Other Notes and Comments	

3.8.2 Interface Detailed Specifications (if applicable)

The data will be contained in multiple files. Each file will have a header row that contains the following information. The count indicates the number of records in the remainder of the file. The trailer record is the same as described in Section 3.

Table 10: Header Row for T&A data files

Field Name	Allow Null?	Data Type
BATCH_ID	No	NUMBER(10)
PROCESS_IND	No	VARCHAR(1)
TYPE	No	VARCHAR(1)
COUNT	Yes	NUMBER(10)
PROCESS_DATE	Yes	DATE
TIMESTAMP	Yes	DATE

The T&A IND file contains the employee data for the agency along with the labor codes for the pay period. The file will be ~ delimited and an end of line character at the end of each record. There will be one Header row followed by the "count" number of records in the format shown in the next table.

Table 11: T&A IND record layouts

Field Name	Allow Null?	Data Type
SEQ_NO	No	NUMBER(10)
AGENCY	No	VARCHAR(3)
SSN	No	VARCHAR(9)
PP_YEAR	Yes	VARCHAR(6)
AWS_IND	Yes	VARCHAR(1)
SEP_IND	Yes	VARCHAR(1)
PROCESS_DATE	Yes	DATE
LABOR_CODE	Yes	VARCHAR(1)
LABOR_INFO	Yes	VARCHAR(3)
REMARKS	Yes	VARCHAR(60)
TOUR	Yes	VARCHAR(1)
BATCH_ID	Yes	NUMBER(10)
PROCESS_IND	Yes	1 Byte
TIMESTAMP	Yes	DATE
BLOCK_CURR	Yes	VARCHAR(5)

The T&A Data file contains the days and hours charged for the pay period for the employee. The file contains a Header row that defines the number of records contained in the rest of the file. The fields are delimited with a ~ and each record ends with an end of line character.

Table 12: T&A Data record layout

Field Name	Allow Null?	Data Type
SEQ_NO	No	NUMBER(10)
DAYX	No	VARCHAR(2)
TA_CODE	No	VARCHAR(2)
AGENCY	No	VARCHAR(3)
SSN	No	VARCHAR(9)
HOURS	Yes	NUMBER(4)
BATCH_ID	Yes	NUMBER(10)
TIMESTAMP	Yes	DATE

3.9 Reconciliation Data – PAR to HR SSC (T&A)

3.9.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR029

Summary Interface Description	
Attribute	**Description**
Purpose of Interface	Reconcile information between the Payroll system and the T&A by supplying final hours and payroll information back to the T&A system. The files are similar to those generated in the reverse direction (similar to T&A to PAR files).
Source System/Module and/or entity	PAR
Source System Owner	GSA IT
Receiving System	HR SSC T&A
Receiving System Owner	TBD
Type of File	ASCII with tilde (~) delimiters; one record per line of the file with header and trailer record
Number of data elements	
Description of data elements in interface	Final payroll run numbers for the T&A data. There may have been edits made as part of the payroll system that should be recorded in the T&A systems.
Transfer Protocol	SFTP
Production Frequency	Bi-weekly
Sequencing of interface	N/A
Timing constraints	1st Thursday of current pay period - Pay Week Thursday
Approximate size of file	IND data -> 132 bytes * number of employees involved Data -> 40 bytes * number of employees * number of days / entries Potentially 20,000+ employees
Other Notes and Comments	

3.9.2 Interface Detailed Specifications (if applicable)

The data will be contained in multiple files. Each file will have a header row that contains the following information. The count indicates the number of records in the remainder of the file.

Table 13: Header Row for reconciliation records

Field Name	Allow Null?	Data Type
PROCESS_DATE	Yes	DATE

Field Name	Allow Null?	Data Type
COUNT	Yes	NUMBER(10)
PROCESS_IND	No	VARCHAR(1)

The PAR T&A Correction IND file contains the employee data for the agency along with the labor codes for the pay period. The file will be ~ delimited and an end of line character at the end of each record. There will be one Header row followed by the "count" number of records in the format shown in the next table.

Table 14: PAR T&A Correction IND record layout

Field Name	Allow Null?	Data Type
AGENCY	No	VARCHAR(3)
SSN	No	VARCHAR(9)
SEQ_NO	No	NUMBER(10)
AWS_IND	Yes	VARCHAR(1)
SEP_IND	Yes	VARCHAR(1)
SOURCE	Yes	VARCHAR(10)
PROCESS_DATE	Yes	DATE
PP_YEAR	Yes	VARCHAR(6)
PP_NO	Yes	NUMBER(2)
REMARKS	Yes	VARCHAR(60)
PROCESS_IND	Yes	1 Byte

The PAR T&A Correction Data file contains the days and hours charged for the pay period for the employee. The file contains a Header row that defines the number of records contained in the rest of the file. The fields are delimited with a ~ and each record ends with an end of line character.

Table 15: PAR T&A Correction Data record layout

Field Name	Allow Null?	Data Type
SEQ_NO	No	NUMBER(10)
AGENCY	No	VARCHAR(3)
SSN	No	VARCHAR(9)
DAY	No	VARCHAR(2)
CODE	Yes	VARCHAR(2)
HOURS	Yes	NUMBER(4,1)

3.10 Leave Data – PAR to HR SSC (T&A)

3.10.1 Interface Overview

Summary Interface Description	
Attribute	**Description**
RTM Number	GNFR029

Summary Interface Description	
Attribute	**Description**
Purpose of Interface	Provide TA system with Leave Balance
Source System/Module and/or entity	PAR
Source System Owner	GSA IT
Receiving System	HR SSC T&A
Receiving System Owner	TBD
Type of File	ASCII with tilde (~) delimiters; one record per line of the file with header and trailer record
Number of data elements	34
Description of data elements in interface	Leave Earn/Used/Balance (annual, sick, comp time, travel comp time, credit hours), LWOP/AWOL ytd hrs used, Work Schedule(full time, part time, int), Pay Status code (active, separated), FLSA code, Pay Plan, Accounting information
Transfer Protocol	SFTP
Production Frequency	Bi-weekly
Sequencing of interface	
Timing constraints	1st Thursday of current pay period - Pay Week Thursday
Approximate size of file	211+ bytes * number of employees Process for 20,000+ records
Other Notes and Comments	

3.10.2 Interface Detailed Specifications (if applicable)

The following table provides the list of fields to be supplied in the leave data file with the exception of the Header and Trailer records that will be used as described in Section 3.

Table 16: Leave Data record layout

Field Name	Allow Null?	Data Type
ETAMS_EMP_SEQ	N	NUMBER (10)
ETAMS_EMP_BLOCK	Y	VARCHAR2 (6 Byte)
ETAMS_EMP_SSN	Y	VARCHAR2 (9 Byte)
ETAMS_EMP_NAME	Y	VARCHAR2 (27 Byte)

Field Name	Allow Null?	Data Type
ETAMS_EMP_FLSA_CD	Y	VARCHAR2 (1 Byte)
ETAMS_EMP_PAY_PLAN	Y	VARCHAR2 (2 Byte)
ETAMS_EMP_PP_NO	N	NUMBER (2)
ETAMS_EMP_PP_YEAR	N	NUMBER (4)
ETAMS_EMP_YTD_LWOP_HRS	Y	NUMBER (5,1)
ETAMS_EMP_YTD_AWOL_HRS	Y	NUMBER (5,1)
ETAMS_EMP_AL_CATEGORY	Y	VARCHAR2 (1 Byte)
ETAMS_EMP_AL_BAL	Y	NUMBER (5,1)
ETAMS_EMP_AL_CARRYOVER	Y	NUMBER (5,1)
ETAMS_EMP_AL_EARNED	Y	NUMBER (5,1)
ETAMS_EMP_AL_USED	Y	NUMBER (5,1)
ETAMS_EMP_SL_BAL	Y	NUMBER (5,1)
ETAMS_EMP_SL_CARRYOVER	Y	NUMBER (5,1)
ETAMS_EMP_SL_EARNED	Y	NUMBER (5,1)
ETAMS_EMP_SL_USED	Y	NUMBER (5,1)
ETAMS_EMP_COMP_LV_BAL	Y	NUMBER (5,1)
ETAMS_EMP_FT_PT_INT_CD	Y	VARCHAR2 (1 Byte)
ETAMS_EMP_PAY_STATUS	Y	VARCHAR2 (1 Byte)
ETAMS_EMP_FUND_CODE	Y	VARCHAR2 (3 Byte)
ETAMS_EMP_SERVICE_CODE	Y	VARCHAR2 (1 Byte)
ETAMS_EMP_REGION_CODE	Y	VARCHAR2 (2 Byte)
ETAMS_EMP_ORG_CODE	Y	VARCHAR2 (5 Byte)
ETAMS_EMP_BUDGET_ACT_CODE	Y	VARCHAR2 (2 Byte)
ETAMS_EMP_FUNCTION_CODE	Y	VARCHAR2 (3 Byte)
ETAMS_EMP_CRAFT_CODE	Y	VARCHAR2 (3 Byte)
ETAMS_EMP_LOCATION_CODE	Y	VARCHAR2 (3 Byte)
ETAMS_EMP_OBJECT_CLASS	Y	VARCHAR2 (2 Byte)
ETAMS_EMP_COST_ELEMENT	Y	VARCHAR2 (3 Byte)
ETAMS_EMP_CRED_LV_BAL	Y	NUMBER (5,1)
ETAMS_EMP_TRVLCOMP_LV_BAL	Y	NUMBER (5,1)

4 Appendix A: Glossary of Terms

The following table defines the attributes used in the interface descriptions in this document.

Summary Interface Description	
Attribute	**Description**
HRIT Ref Number	This is the Reference Number from the GSA Interface ICD Summary document.
RTM Number	This is the number assigned and will be contained in the RTM

Summary Interface Description	
Attribute	**Description**
Interface Name	This should match the name in the Summary Table above
Purpose of Interface	A business description of the reason for the interface/extract/file transfer
Source System/Module and/or entity	This should map to one of the systems and modules listed in the diagram in Section 1. For example: CHRIS Personnel Action Processing
Source System Owner	This could be GSA, an external entity or an external customer agency
Receiving System	The system that is receiving the interface. If this is just a file being sent without direct interaction with a system (such as an extract), please note that fact
Receiving System Owner	This could be GSA, an external entity or an external customer agency
Type of File	Indicate the format of the file, e.g., comma-separated values (CVS), Extensible Markup Language (XML), text (TXT), etc.
Are calculations or special formatting performed as part of the file creation?	Please explain at a high level, if there are any calculations or special formatting performed between pulling the data from the source system, and sending the final resulting data to the receiving system or entity. This could include aggregating multiple source fields into a single field or splitting a single field into multiple fields.
Number of data elements	A count of how many fields are presented in the file/interface
Description of data elements in interface	List and/or description of the data elements (in layman's terms) in the file
Current Protocol Used	Description of the communication(s) protocol used
Production Frequency	Describe whether this interface is daily, weekly, monthly, etc...or a combination of those
Security Considerations	Describe any special security requirements that are applicable to this interface/file
Sequencing of interface	Describe when this interface occurs and whether there are any dependencies on other jobs and/or interfaces before this one can be produced and sent
Timing constraints	The specific time of day that the interface must be created and sent.

Summary Interface Description	
Attribute	**Description**
	Note if a deadline is a hard deadline or if it is flexible and/or negotiable
File layout 'Attachment' and any other pertinent attachments	Please attach supporting documentation that contains the file layouts (field names, length, type, special formats etc...) Attach any other relevant information that will assist a future vendor in assessing the work needed to create this interface from the new system For each attachment, list a brief description of each
Special (Post-)Processing Rules	Describe any rules or procedures that need to take placed based on the file. For example if a list of user accounts is imported any existing user that was not on the file should be deactivated or deleted.
Other Notes and Comments	

5 Appendix B: Potential Additional Interfaces

There are currently additional other linkages between the current CHRIS and PAR interfaces. The interfaces described in Section 3 are likely to be required in the new system. The interfaces in this section will be discussed during the fit-gap phase of the project and it will determined whether these interfaces (or similar) are needed with the new system.

HR SSC to PAR

ALL tables below are 'Views' of CHRIS data from CHRIS Database Link. Database

CHRIS_ORGANIZATION_INFO

Field Name	Allow Null ?	Data Type
BUSINESS_GROUP_ID	N	NUMBER (15)
ORGANIZATION_ID	N	NUMBER (15)
ORGANIZATION_NAME	N	VARCHAR2 (240 Byte)
OFFICE_SYMBOL	Y	VARCHAR2 (150 Byte)
ORG_EFFECTIVE_START_DATE	N	DATE
ORG_EFFECTIVE_END_DATE	Y	DATE
AGENCY_CODE_SUBELEMENT_CODE	Y	VARCHAR2 (150 Byte)
ORGANIZATION_LINE_1	Y	VARCHAR2 (150 Byte)
ORGANIZATION_LINE_2	Y	VARCHAR2 (150 Byte)
ORGANIZATION_LINE_3	Y	VARCHAR2 (150 Byte)
ORGANIZATION_LINE_4	Y	VARCHAR2 (150 Byte)
ORGANIZATION_LINE_5	Y	VARCHAR2 (150 Byte)
ORGANIZATION_LINE_6	Y	VARCHAR2 (150 Byte)

CHRIS_EMPLOYEE_V

Field Name	Allow Null ?	Data Type
CHRIS_ID	Y	NUMBER (10)
PERSON_TYPE	Y	VARCHAR2 (11 Byte)
LAST_NAME	Y	VARCHAR2 (25 Byte)
FIRST_NAME	Y	VARCHAR2 (25 Byte)
MIDDLE_NAME	Y	VARCHAR2 (25 Byte)
SSN	Y	VARCHAR2 (9 Byte)
EMAIL	Y	VARCHAR2 (50 Byte)
AGY_SUBELEMENT	Y	VARCHAR2 (5 Byte)
TARGET_PAY_PLAN	Y	VARCHAR2 (5 Byte)
TARGET_GRADE_LEVEL	Y	VARCHAR2 (5 Byte)
HIRE_DATE	Y	DATE
TERMINATION_DATE	Y	DATE
GENDER	Y	VARCHAR2 (30 Byte)

CHRIS_ORG_LOC

Field Name	Allow Null ?	Data Type
AGY	Y	CHAR (2 Byte)
REGION	Y	VARCHAR2 (1 Byte)
ORG_LOC_CD	N	VARCHAR2 (240 Byte)
OFFICE_LEVEL	Y	VARCHAR2 (150 Byte)
CORRES_SYMBOL	N	VARCHAR2 (240 Byte)
SON	Y	VARCHAR2 (150 Byte)
HEAD_OF_OFFICE	Y	VARCHAR2 (150 Byte)
DIVISION_LEVEL	Y	VARCHAR2 (150 Byte)
BRANCH_LEVEL	Y	VARCHAR2 (150 Byte)
SECTION_LEVEL	Y	VARCHAR2 (150 Byte)
SUBSECTION_LEVEL	Y	VARCHAR2 (150 Byte)

CHRIS_SUPERVISORS_MV

Field Name	Allow Null ?	Data Type
CHRIS_ID	Y	NUMBER (10)
PERSON_TYPE	Y	VARCHAR2 (11 Byte)
LAST_NAME	Y	VARCHAR2 (30 Byte)
FIRST_NAME	Y	VARCHAR2 (30 Byte)
MIDDLE_NAME	Y	VARCHAR2 (25 Byte)
SSN	N	VARCHAR2 (9 Byte)
AGY	N	VARCHAR2 (3 Byte)
HSSO_OFFICE_CD	Y	VARCHAR2 (10 Byte)
HSSO_OFFICE	Y	VARCHAR2 (100 Byte)
EMAIL	Y	VARCHAR2 (50 Byte)
PAY_STS	N	VARCHAR2 (1 Byte)
TERMINATION_DATE	Y	DATE
SUPERV_CD	Y	VARCHAR2 (1 Byte)
SUPERVISORY_STATUS_CODE	Y	VARCHAR2 (150 Byte)

CHRIS_PAR_EMPLOYEE_V (Materialized View)

Field Name	Allow Null ?	Data Type
CHRIS_ID	Y	NUMBER (10)
AGY	N	VARCHAR2 (3 Byte)
SSN	N	VARCHAR2 (9 Byte)
NAME	N	VARCHAR2 (27 Byte)
LAST_NAME	Y	VARCHAR2 (25 Byte)
FIRST_NAME	Y	VARCHAR2 (25 Byte)
MIDDLE_NAME	Y	VARCHAR2 (25 Byte)
EMAIL	Y	VARCHAR2 (50 Byte)

AGY_SUBELEMENT	Y	VARCHAR2 (5 Byte)
HSSO_OFFICE_CD	Y	VARCHAR2 (10 Byte)
HSSO_OFFICE	Y	VARCHAR2 (100 Byte)
TARGET_PAY_PLAN	Y	VARCHAR2 (5 Byte)
TARGET_GRADE_LEVEL	Y	VARCHAR2 (5 Byte)
HIRE_DATE	Y	DATE
EOD	N	DATE
TERMINATION_DATE	Y	DATE
YTD_GROSS	N	NUMBER (8,2)
GENDER	Y	VARCHAR2 (30 Byte)

PAR to HR SSC

ALL tables below are available to CHRIS via Database Link. CHRIS pulls the date from PAR tables to create the 'Valid' and 'Error' records on the current HR Transaction File processed.

HR_ERRORS

Field Name	Allow Null ?	Data Type
HR_ERR_AGY	Y	VARCHAR2 (3 Byte)
HR_ERR_SSN	Y	VARCHAR2 (9 Byte)
HR_ERR_NOA_CD	Y	VARCHAR2 (3 Byte)
HR_ERR_NOA_EFF_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_NOA_001_002	Y	VARCHAR2 (3 Byte)
HR_ERR_001_002_EFF_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_PIRS_PROC_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_PIRS_PROC_TIME	Y	VARCHAR2 (8 Byte)
HR_ERR_RETRO_IND	Y	VARCHAR2 (1 Byte)
HR_ERR_SYS_USER_ID	Y	VARCHAR2 (9 Byte)
HR_ERR_PROCESS_DATE	Y	DATE
HR_ERR_PENDING_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_CD_1	Y	VARCHAR2 (5 Byte)
HR_ERR_CD_2	Y	VARCHAR2 (5 Byte)
HR_ERR_CD_3	Y	VARCHAR2 (5 Byte)
HR_ERR_CD_4	Y	VARCHAR2 (5 Byte)
HR_ERR_CD_5	Y	VARCHAR2 (5 Byte)
HR_ERR_CD_6	Y	VARCHAR2 (5 Byte)
HR_ERR_CD_7	Y	VARCHAR2 (5 Byte)
HR_ERR_CD_8	Y	VARCHAR2 (5 Byte)
HR_ERR_CD_9	Y	VARCHAR2 (5 Byte)
HR_ERR_CD_10	Y	VARCHAR2 (5 Byte)
HR_ERR_BLOCK_CURR	Y	VARCHAR2 (5 Byte)
HR_ERR_NAME	Y	VARCHAR2 (27 Byte)
HR_ERR_DOB	Y	VARCHAR2 (8 Byte)
HR_ERR_TENURE	Y	VARCHAR2 (1 Byte)
HR_ERR_SCD	Y	VARCHAR2 (8 Byte)

Field Name	Allow Null ?	Data Type
HR_ERR_GLI_CD	Y	VARCHAR2 (2 Byte)
HR_ERR_RETIRE_CD	Y	VARCHAR2 (3 Byte)
HR_ERR_POSITION_TITLE	Y	VARCHAR2 (22 Byte)
HR_ERR_PAY_PLAN	Y	VARCHAR2 (2 Byte)
HR_ERR_OCCUP_CD	Y	VARCHAR2 (4 Byte)
HR_ERR_RETAIN_PLAN	Y	VARCHAR2 (2 Byte)
HR_ERR_RETAIN_GRADE	Y	VARCHAR2 (2 Byte)
HR_ERR_RETAIN_STEP	Y	VARCHAR2 (2 Byte)
HR_ERR_RETAIN_SCHED	Y	VARCHAR2 (4 Byte)
HR_ERR_RETAIN_BASIS	Y	VARCHAR2 (2 Byte)
HR_ERR_GRADE	Y	VARCHAR2 (2 Byte)
HR_ERR_STEP	Y	VARCHAR2 (2 Byte)
HR_ERR_ANN_SAL	Y	VARCHAR2 (8 Byte)
HR_ERR_PAY_BASIS	Y	VARCHAR2 (2 Byte)
HR_ERR_DS_STATE	Y	VARCHAR2 (2 Byte)
HR_ERR_DS_CITY	Y	VARCHAR2 (4 Byte)
HR_ERR_DS_COUNTY	Y	VARCHAR2 (3 Byte)
HR_ERR_AD_FUND_CD	Y	VARCHAR2 (3 Byte)
HR_ERR_AD_SERV_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_AD_REGION	Y	VARCHAR2 (2 Byte)
HR_ERR_AD_ORG_CD	Y	VARCHAR2 (5 Byte)
HR_ERR_AD_BUDGT_ACT	Y	VARCHAR2 (2 Byte)
HR_ERR_AD_OBJ_CLASS	Y	VARCHAR2 (2 Byte)
HR_ERR_AD_FUNC_CD	Y	VARCHAR2 (3 Byte)
HR_ERR_AD_COST_ELEM	Y	VARCHAR2 (3 Byte)
HR_ERR_AD_WRK_CRAFT	Y	VARCHAR2 (3 Byte)
HR_ERR_WIG_BEG_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_NEXT_WIG_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_ORG_LOC	Y	VARCHAR2 (30 Byte)
HR_ERR_NTE_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_NTE_HRS_LIMIT	Y	VARCHAR2 (5 Byte)
HR_ERR_NTE_SAL_LIMIT	Y	VARCHAR2 (8 Byte)
HR_ERR_EOD	Y	VARCHAR2 (8 Byte)
HR_ERR_ANNUIT_AMT	Y	VARCHAR2 (8 Byte)
HR_ERR_ANNUIT_STATUS	Y	VARCHAR2 (1 Byte)
HR_ERR_TYPE_APPT	Y	VARCHAR2 (2 Byte)
HR_ERR_FT_PT_INT_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_PT_PERM_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_PRD	Y	VARCHAR2 (1 Byte)
HR_ERR_HBI_CD	Y	VARCHAR2 (3 Byte)
HR_ERR_HBI_TEMPCOST_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_PREM_PAY_PCT_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_PAY_SCHED_NO	Y	VARCHAR2 (4 Byte)
HR_ERR_SON	Y	VARCHAR2 (4 Byte)

Field Name	Allow Null ?	Data Type
HR_ERR_FLSA_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_NF_COLA	Y	VARCHAR2 (6 Byte)
HR_ERR_NORMAL_HRS	Y	VARCHAR2 (3 Byte)
HR_ERR_FERS_COVG_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_LOCALITY_PCT	Y	VARCHAR2 (6 Byte)
HR_ERR_LOCALITY_PAY	Y	VARCHAR2 (5 Byte)
HR_ERR_REGION	Y	VARCHAR2 (1 Byte)
HR_ERR_AGY_TRF_TO	Y	VARCHAR2 (2 Byte)
HR_ERR_SEVER_ENTITLED	Y	VARCHAR2 (8 Byte)
HR_ERR_NTE_DATE_LWOP	Y	VARCHAR2 (8 Byte)
HR_ERR_NTE_FURLOUGH	Y	VARCHAR2 (8 Byte)
HR_ERR_NTE_TEMP_PROM	Y	VARCHAR2 (8 Byte)
HR_ERR_NTE_DETAIL_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_NTE_SUSPENSION	Y	VARCHAR2 (8 Byte)
HR_ERR_NTE_SABBATICAL	Y	VARCHAR2 (8 Byte)
HR_ERR_NTE_DATE_LWP	Y	VARCHAR2 (8 Byte)
HR_ERR_AWARD_TYPE	Y	VARCHAR2 (2 Byte)
HR_ERR_AWARD_AMT	Y	VARCHAR2 (8 Byte)
HR_ERR_AWARD_DIST_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_NEW_SSN	Y	VARCHAR2 (9 Byte)
HR_ERR_TSP_STATUS_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_TSP_STATUS_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_TSP_SCD	Y	VARCHAR2 (8 Byte)
HR_ERR_TSP_EMP_RATE	Y	VARCHAR2 (6 Byte)
HR_ERR_TSP_EMP_AMT	Y	VARCHAR2 (6 Byte)
HR_ERR_TSP_DIST_C	Y	VARCHAR2 (6 Byte)
HR_ERR_TSP_DIST_F	Y	VARCHAR2 (6 Byte)
HR_ERR_TSP_DIST_G	Y	VARCHAR2 (6 Byte)
HR_ERR_TSP_VEST_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_RETENTION_ALLOW	Y	VARCHAR2 (8 Byte)
HR_ERR_STAFFING_DIFF	Y	VARCHAR2 (8 Byte)
HR_ERR_SUPV_DIFF	Y	VARCHAR2 (8 Byte)
HR_ERR_AWARD_HRS	Y	VARCHAR2 (2 Byte)
HR_ERR_POS_NTE_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_PRODUCT_DIST_CD	Y	VARCHAR2 (3 Byte)
HR_ERR_RETIRE_SCD	Y	VARCHAR2 (8 Byte)
HR_ERR_OPM_1635_CD	Y	VARCHAR2 (1 Byte)
HR_ERR_NTE_MAND_RET	Y	VARCHAR2 (8 Byte)
HR_ERR_REC_PROCESS_IND	Y	VARCHAR2 (1 Byte)
HR_ERR_TRNG_PROG_ID	Y	VARCHAR2 (2 Byte)
HR_ERR_CHRIS_DATETIME	Y	VARCHAR2 (22 Byte)
HR_ERR_PAR_TRAN_GEN_ID	Y	VARCHAR2 (1 Byte)
HR_ERR_UPDATE_REC_ID	Y	VARCHAR2 (15 Byte)
HR_ERR_GENDER_CD	Y	VARCHAR2 (1 Byte)

Field Name	Allow Null ?	Data Type
HR_ERR_NTE_TEMP_REASSIGN	Y	VARCHAR2 (8 Byte)
HR_ERR_STREET1	Y	VARCHAR2 (25 Byte)
HR_ERR_STREET2	Y	VARCHAR2 (14 Byte)
HR_ERR_CITY	Y	VARCHAR2 (20 Byte)
HR_ERR_STATE	Y	VARCHAR2 (20 Byte)
HR_ERR_ZIP1	Y	VARCHAR2 (5 Byte)
HR_ERR_ZIP2	Y	VARCHAR2 (4 Byte)
HR_ERR_INCENTIVE_CATEGORY	Y	VARCHAR2 (4 Byte)
HR_ERR_PAYMENT_OPTION	Y	VARCHAR2 (2 Byte)
HR_ERR_PAYMENT_BEGIN_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_PAYMENT_END_DATE	Y	VARCHAR2 (8 Byte)
HR_ERR_RETENTION_PCT	Y	VARCHAR2 (6 Byte)
HR_ERR_INCENTIVE_AMT	Y	VARCHAR2 (8 Byte)
HR_ERR_BARG_UNIT_STATUS_CD	Y	VARCHAR2 (4 Byte)
HR_ERR_TSP_ROTH_EMP_RATE	Y	VARCHAR2 (6 Byte)
HR_ERR_TSP_ROTH_EMP_AMT	Y	VARCHAR2 (6 Byte)
HR_ERR_TSP_ROTH_CU_AMT	Y	VARCHAR2 (6 Byte)
HR_ERR_LEGAL_AUTH_CD_1	Y	VARCHAR2 (3 Byte)
HR_ERR_LEGAL_AUTH_CD_2	Y	VARCHAR2 (3 Byte)

HR_VALID

Field Name	Allow Null ?	Data Type
HR_VAL_AGY	Y	VARCHAR2 (3 Byte)
HR_VAL_SSN	Y	VARCHAR2 (9 Byte)
HR_VAL_NOA_CD	Y	VARCHAR2 (3 Byte)
HR_VAL_NOA_EFF_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_NOA_001_002	Y	VARCHAR2 (3 Byte)
HR_VAL_001_002_EFF_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_PIRS_PROC_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_PIRS_PROC_TIME	Y	NUMBER (8)
HR_VAL_RETRO_IND	Y	VARCHAR2 (1 Byte)
HR_VAL_SYS_USER_ID	Y	VARCHAR2 (9 Byte)
HR_VAL_PROCESS_DATE	Y	DATE
HR_VAL_BLOCK_CURR	Y	VARCHAR2 (5 Byte)
HR_VAL_NAME	Y	VARCHAR2 (27 Byte)
HR_VAL_DOB	Y	VARCHAR2 (8 Byte)
HR_VAL_TENURE	Y	VARCHAR2 (1 Byte)
HR_VAL_SCD	Y	VARCHAR2 (8 Byte)
HR_VAL_GLI_CD	Y	VARCHAR2 (2 Byte)
HR_VAL_RETIRE_CD	Y	VARCHAR2 (3 Byte)
HR_VAL_POSITION_TITLE	Y	VARCHAR2 (22 Byte)
HR_VAL_PAY_PLAN	Y	VARCHAR2 (2 Byte)
HR_VAL_OCCUP_CD	Y	VARCHAR2 (4 Byte)
HR_VAL_RETAIN_PLAN	Y	VARCHAR2 (2 Byte)

Field Name	Allow Null ?	Data Type
HR_VAL_RETAIN_GRADE	Y	VARCHAR2 (2 Byte)
HR_VAL_RETAIN_STEP	Y	VARCHAR2 (2 Byte)
HR_VAL_RETAIN_SCHED	Y	VARCHAR2 (4 Byte)
HR_VAL_RETAIN_BASIS	Y	VARCHAR2 (2 Byte)
HR_VAL_GRADE	Y	VARCHAR2 (2 Byte)
HR_VAL_STEP	Y	VARCHAR2 (2 Byte)
HR_VAL_ANN_SAL	Y	VARCHAR2 (8 Byte)
HR_VAL_PAY_BASIS	Y	VARCHAR2 (2 Byte)
HR_VAL_DS_STATE	Y	VARCHAR2 (2 Byte)
HR_VAL_DS_CITY	Y	VARCHAR2 (4 Byte)
HR_VAL_DS_COUNTY	Y	VARCHAR2 (3 Byte)
HR_VAL_AD_FUND_CD	Y	VARCHAR2 (3 Byte)
HR_VAL_AD_SERV_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_AD_REGION	Y	VARCHAR2 (2 Byte)
HR_VAL_AD_ORG_CD	Y	VARCHAR2 (5 Byte)
HR_VAL_AD_BUDGT_ACT	Y	VARCHAR2 (2 Byte)
HR_VAL_AD_OBJ_CLASS	Y	VARCHAR2 (2 Byte)
HR_VAL_AD_FUNC_CD	Y	VARCHAR2 (3 Byte)
HR_VAL_AD_COST_ELEM	Y	VARCHAR2 (3 Byte)
HR_VAL_AD_WRK_CRAFT	Y	VARCHAR2 (3 Byte)
HR_VAL_WIG_BEG_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_NEXT_WIG_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_ORG_LOC	Y	VARCHAR2 (30 Byte)
HR_VAL_NTE_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_NTE_HRS_LIMIT	Y	VARCHAR2 (5 Byte)
HR_VAL_NTE_SAL_LIMIT	Y	VARCHAR2 (8 Byte)
HR_VAL_EOD	Y	VARCHAR2 (8 Byte)
HR_VAL_ANNUIT_AMT	Y	VARCHAR2 (8 Byte)
HR_VAL_ANNUIT_STATUS	Y	VARCHAR2 (1 Byte)
HR_VAL_TYPE_APPT	Y	VARCHAR2 (2 Byte)
HR_VAL_FT_PT_INT_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_PT_PERM_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_PRD	Y	VARCHAR2 (1 Byte)
HR_VAL_HBI_CD	Y	VARCHAR2 (3 Byte)
HR_VAL_HBI_TEMPCOST_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_PREM_PAY_PCT_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_PAY_SCHED_NO	Y	VARCHAR2 (4 Byte)
HR_VAL_SON	Y	VARCHAR2 (4 Byte)
HR_VAL_FLSA_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_NF_COLA	Y	VARCHAR2 (6 Byte)
HR_VAL_NORMAL_HRS	Y	VARCHAR2 (3 Byte)
HR_VAL_FERS_COVG_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_LOCALITY_PCT	Y	VARCHAR2 (6 Byte)
HR_VAL_LOCALITY_PAY	Y	VARCHAR2 (5 Byte)

Field Name	Allow Null ?	Data Type
HR_VAL_REGION	Y	VARCHAR2 (1 Byte)
HR_VAL_AGY_TRF_TO	Y	VARCHAR2 (2 Byte)
HR_VAL_SEVER_ENTITLED	Y	VARCHAR2 (8 Byte)
HR_VAL_NTE_DATE_LWOP	Y	VARCHAR2 (8 Byte)
HR_VAL_NTE_FURLOUGH	Y	VARCHAR2 (8 Byte)
HR_VAL_NTE_TEMP_PROM	Y	VARCHAR2 (8 Byte)
HR_VAL_NTE_DETAIL_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_NTE_SUSPENSION	Y	VARCHAR2 (8 Byte)
HR_VAL_NTE_SABBATICAL	Y	VARCHAR2 (8 Byte)
HR_VAL_NTE_DATE_LWP	Y	VARCHAR2 (8 Byte)
HR_VAL_AWARD_TYPE	Y	VARCHAR2 (2 Byte)
HR_VAL_AWARD_AMT	Y	VARCHAR2 (8 Byte)
HR_VAL_AWARD_DIST_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_NEW_SSN	Y	VARCHAR2 (9 Byte)
HR_VAL_TSP_STATUS_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_TSP_STATUS_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_TSP_SCD	Y	VARCHAR2 (8 Byte)
HR_VAL_TSP_EMP_RATE	Y	VARCHAR2 (6 Byte)
HR_VAL_TSP_EMP_AMT	Y	VARCHAR2 (6 Byte)
HR_VAL_TSP_DIST_C	Y	VARCHAR2 (6 Byte)
HR_VAL_TSP_DIST_F	Y	VARCHAR2 (6 Byte)
HR_VAL_TSP_DIST_G	Y	VARCHAR2 (6 Byte)
HR_VAL_TSP_VEST_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_RETENTION_ALLOW	Y	VARCHAR2 (8 Byte)
HR_VAL_STAFFING_DIFF	Y	VARCHAR2 (8 Byte)
HR_VAL_SUPV_DIFF	Y	VARCHAR2 (8 Byte)
HR_VAL_AWARD_HRS	Y	VARCHAR2 (2 Byte)
HR_VAL_POS_NTE_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_PRODUCT_DIST_CD	Y	VARCHAR2 (3 Byte)
HR_VAL_RETIRE_SCD	Y	VARCHAR2 (8 Byte)
HR_VAL_OPM_1635_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_NTE_MAND_RET	Y	VARCHAR2 (8 Byte)
HR_VAL_REC_PROCESS_IND	Y	VARCHAR2 (1 Byte)
HR_VAL_TRNG_PROG_ID	Y	VARCHAR2 (2 Byte)
HR_VAL_CHRIS_DATETIME	Y	VARCHAR2 (22 Byte)
HR_VAL_PAR_TRAN_GEN_ID	Y	VARCHAR2 (1 Byte)
HR_VAL_UPDATE_REC_ID	Y	VARCHAR2 (15 Byte)
HR_VAL_GENDER_CD	Y	VARCHAR2 (1 Byte)
HR_VAL_NTE_TEMP_REASSIGN	Y	VARCHAR2 (8 Byte)
HR_VAL_STREET1	Y	VARCHAR2 (25 Byte)
HR_VAL_STREET2	Y	VARCHAR2 (14 Byte)
HR_VAL_CITY	Y	VARCHAR2 (20 Byte)
HR_VAL_STATE	Y	VARCHAR2 (2 Byte)
HR_VAL_ZIP1	Y	VARCHAR2 (5 Byte)

Field Name	Allow Null ?	Data Type
HR_VAL_ZIP2	Y	VARCHAR2 (4 Byte)
HR_VAL_INCENTIVE_CATEGORY	Y	VARCHAR2 (4 Byte)
HR_VAL_PAYMENT_OPTION	Y	VARCHAR2 (2 Byte)
HR_VAL_PAYMENT_BEGIN_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_PAYMENT_END_DATE	Y	VARCHAR2 (8 Byte)
HR_VAL_RETENTION_PCT	Y	VARCHAR2 (6 Byte)
HR_VAL_INCENTIVE_AMT	Y	VARCHAR2 (8 Byte)
HR_VAL_BARG_UNIT_STATUS_CD	Y	VARCHAR2 (4 Byte)
HR_VAL_TSP_ROTH_EMP_RATE	Y	VARCHAR2 (6 Byte)
HR_VAL_TSP_ROTH_EMP_AMT	Y	VARCHAR2 (6 Byte)
HR_VAL_TSP_ROTH_CU_AMT	Y	VARCHAR2 (6 Byte)
HR_VAL_LEGAL_AUTH_CD_1	Y	VARCHAR2 (3 Byte)
HR_VAL_LEGAL_AUTH_CD_2	Y	VARCHAR2 (3 Byte)

Data Elements to create an HR/PAR Reconciliation Report to ensure the Databases are in link (i.e. Salary, HBI, TSP Rate/Pct, Org_Loc, etc.) -- believe these data elements would need to be included on some sort of interface file. Since we are not sharing a single database, we need to ensure that specific data elements within each database remain in check.

Data Elements pulled from PAR by CHRIS via Database Link to create EEX Masterfile
CHRIS handles the current interface with the Employee Express taking data from both HR and PAR to create files for Employee Express and vice versa. It is assumed that the current vendor has interfaces with Employee Express but these may need to be specialized to incorporate the linkage with PAR.

ETAMS (TA System) currently runs an automated process daily (5:00 am) to pull the following data from the PAR tables. These interfaces deal with the GSA leave system (ALOHA) and T&A system which fall within the ePayroll program and not HR. It is assumed that the new HR SSC system will have its own existing interfaces between HR and T&A which will not need modification, but some data to and from PAR may be required. The following lists these existing interfaces.

Accounting, Work Schedule and Employee Indicators

EDS_BASIC1
AGY, SSN, NAME, BLOCK_CURR, PAY_STATUS_CD, FT_PT_INT_CD, PAY_PLAN, OCCUP_CD, GRADE, ORG_LOC,ACCTG_DIST_COST_ELEM, ACCTG_DIST_WRK_CRAFT, ACCTG_DIST_SERV_CD, ACCTG_DIST_REGION,ACCTG_DIST_ORG_CD, ACCTG_DIST_FUND_CD, ACCTG_DIST_BUDGT_ACT, ACCTG_DIST_OBJ_CLASS,ACCTG_DIST_FUNC_CD,SEP_DATE, NORMAL_HRS, EOD

EDS_BASIC3
AGY3, SSN3, PROCESS_DATE3, BANKRUPT_LEVY_CD, BW_113A_HRS_WRK_IND,DAYS_WRK_ADJ_IND, EFT_OPEN_BAL_IND, EFT_ROUTING_NO_CHG_IND, FORM_1099_IND,GEN_WIG_IND, GLI_OPT_C_INS_COVG_IND, IN_OUT_DC_CD, LV_CAT_CHG_IND,LV_SF1150_FOLLOW_UP_IND, OVERDRAWN_LV_IND, PIRS_ERR_IND, PROD_DIST_CD,SEP_HOLD_2806_CD, SICK_AWARD_PP_NO_YR, SICK_AWARD_TYPE_CD, TSP_DATA_CD,W4_W5_RECEIPT_TYPE_CD, PLS_PRINT_IND, GLI_AGE_CHG_IND, HBI_PRE_TAX_IND,RETIRE_403B_IND, HBI_COVG_IND

Leave Records (Earned/Used/Balances) - used in ALOHA (realtime process) to show the employee the most current leave balance. These balances include leave adjustments as are result of retroactive personnel actions or timecard.

EDS_LV (this includes: annual, sick, comp time, travel comp time and credit hours)
LV_AGY, LV_SSN, LV_NOA_CD, LV_NOA_EFF_DATE, LV_NOA_001_002, LV_001_002_DATE,LV_SYS_USER_ID, LV_PROCESS_DATE, LV_CD, LV_CO_HRS, LV_CUTBACK, LV_HRS_BAL,LV_HRS_CEILING, LV_HRS_DONATED, LV_HRS_WRK_CO_PT, LV_LUMP_SUM_HRLY_RATE, LV_QTD_HRS_EARN, LV_TPP_HRS_EARN, LV_TPP_HRS_USED, LV_TPP_ORIG_TA_HRS_EARN,LV_USE_LOSE_HRS, LV_USED_BEG_DATE, LV_YTD_HRS_EARN, LV_YTD_HRS_USED, LV_YTD_RPT_HRS_EARN, LV_YTD_RPT_HRS_USED, LV_TPP_TA_HRS_EARN_CUTBCK, LV_YTD_TA_HRS_EARN_CUTBCK, LV_TPP_CUTBACK

EDS_HOME_LV - Home leave
HOME_LV_AGY, HOME_LV_SSN, HOME_LV_NOA_CD, HOME_LV_NOA_EFF_DATE,HOME_LV_NOA_001_002, HOME_LV_001_002_DATE, HOME_LV_SYS_USER_ID,HOME_LV_PROCESS_DATE, HOME_LV_BAL_TRF_IN, HOME_LV_CO, HOME_LV_DAYS_BAL,HOME_LV_EARN_CAT, HOME_LV_MONTH, HOME_LV_OVERSEAS_DATE, HOME_LV_TOUR_END_DATE,HOME_LV_TPP_DAYS_EARN, HOME_LV_TPP_DAYS_USED, HOME_LV_USED_BEG_DATE,HOME_LV_USED_END_DATE, HOME_LV_YTD_DAYS_EARN, HOME_LV_YTD_DAYS_USED,HOME_LV_YTD_RPT_DAYS_EARN, HOME_LV_YTD_RPT_DAYS_USED, HOME_LV_ACCRUAL_MONTH,HOME_LV_YTD_WOP, HOME_LV_CUM_CUTBACK_WOP

EDS_MIL_LV - Military Leave
MIL_LV_AGY, MIL_LV_SSN, MIL_LV_NOA_CD, MIL_LV_NOA_EFF_DATE, MIL_LV_NOA_001_002,MIL_LV_001_002_DATE, MIL_LV_SYS_USER_ID, MIL_LV_PROCESS_DATE, MIL_LV_BEG_DATE,MIL_LV_CD, MIL_LV_CY_HRS_EARN, MIL_LV_CY_HRS_USED, MIL_LV_DAYS_BAL,MIL_LV_DAYS_CO, MIL_LV_DAYS_EARN, MIL_LV_DAYS_USED, MIL_LV_DAYS_TRF_IN,MIL_LV_END_DATE, MIL_LV_HRS_BAL, MIL_LV_HRS_TRF_IN, MIL_LV_TPP_BEG_DATE,MIL_LV_TPP_DAY_USED_PR_FY, MIL_LV_TPP_DAYS_USED, MIL_LV_TPP_END_DATE,MIL_LV_TPP_HRS_USED, MIL_LV_YTD_RPT_HRS_EARN, MIL_LV_YTD_RPT_HRS_USED

EDS_REST_LV - Restored Leave
REST_LV_AGY, REST_LV_SSN, REST_LV_NOA_CD, REST_LV_NOA_EFF_DATE,REST_LV_NOA_001_002, REST_LV_001_002_DATE, REST_LV_SYS_USER_ID,REST_LV_PROCESS_DATE, REST_LV_CD, REST_LV_BAL, REST_LV_BAL_TRF_IN,REST_LV_CO, REST_LV_CUTBACK, REST_LV_EXPIRE_DATE, REST_LV_TPP_HRS_USED,REST_LV_YTD_HRS_REST, REST_LV_YTD_HRS_USED, REST_LV_YTD_RPT_HRS_REST,REST_LV_YTD_RPT_HRS_USED, REST_LV_DONATED_HRS

EDS_SHD_LV_DONOR - Details on employees who donated leave to shared leave recipient
SHD_LV_DONOR_AGY, SHD_LV_DONOR_SSN, SHD_LV_DONOR_NOA_CD,SHD_LV_DONOR_NOA_EFF_DATE, SHD_LV_DONOR_NOA_001_002,SHD_LV_DONOR_001_002_DATE, SHD_LV_DONOR_SYS_USER_ID,SHD_LV_DONOR_PROCESS_DATE, SHD_LV_DONOR_CD, SHD_LV_DONOR_HRS,SHD_LV_DONOR_NAME, SHD_LV_DONOR_RECIP_AGY, SHD_LV_DONOR_RECIP_SSN,SHD_LV_DONOR_RECIP_NAME,

SHD_LV_DONOR_HRS_RETURNED

EDS_SHD_LV_RECIP - Details on shared leave recipient
SHD_LV_AGY, SHD_LV_SSN, SHD_LV_NOA_CD,
SHD_LV_NOA_EFF_DATE,SHD_LV_NOA_001_002, SHD_LV_001_002_DATE,
SHD_LV_SYS_USER_ID,SHD_LV_PROCESS_DATE, SHD_LV_BAL, SHD_LV_CD,
SHD_LV_CUM_HRS_RECV,SHD_LV_CUM_HRS_USED, SHD_LV_CUM_SET_ASIDE_EARN,
SHD_LV_CUM_SET_ASIDE_USED,SHD_LV_HRS_WRK_CO_PT, SHD_LV_TERM_DATE,
SHD_LV_TPP_HRS_USED,SHD_LV_TPP_SET_ASIDE_EARN,
SHD_LV_TPP_SET_ASIDE_USED, SHD_LV_YTD_HRS_RECV,SHD_LV_YTD_HRS_USED,
SHD_LV_HR_TERM_DATE, SHD_LV_HR_REASON

EDS_WOP - Details for employees with Without Pay (includes AWOL, LWOP, and Suspension)
WOP_AGY, WOP_SSN, WOP_NOA_CD, WOP_NOA_EFF_DATE, WOP_NOA_001_002,
WOP_001_002_DATE,WOP_SYS_USER_ID, WOP_PROCESS_DATE, WOP_ADJ_IND,
WOP_AWOL_SLI, WOP_CURR_FY, WOP_CY,WOP_CY_HRLY_RATE,
WOP_FOR_LV_CUTBACK, WOP_LWOP_SLI, WOP_LY, WOP_PR_FY,
WOP_SLI,WOP_TPP_AWOL, WOP_TPP_FOR_LV_CUTBACK, WOP_TPP_LWOP,
WOP_TPP_TA_AWOL,WOP_TPP_TA_LWOP, WOP_YTD_AWOL, WOP_YTD_LWOP,
WOP_YTD_RPT_AWOL, WOP_YTD_RPT_LWOP

Retroactive Timecard Data

RETRO_TAIND
RETRO_TAIND_AGY, RETRO_TAIND_SSN, RETRO_TAIND_SEQ,
RETRO_TAIND_AWS_IND,RETRO_TAIND_SEP_IND, RETRO_TAIND_ETAMS,
RETRO_TAIND_SOURCE,RETRO_TAIND_CONT_IND, RETRO_TAIND_PROC_DT,
RETRO_TAIND_PP_NO_YR,RETRO_TAIND_SUM1, RETRO_TAIND_SUM2,
RETRO_TAIND_SUM3, RETRO_TAIND_SUM4,RETRO_TAIND_SUM5,
RETRO_TAIND_SUM6, RETRO_TAIND_SUM7,
RETRO_TAIND_SUM8,RETRO_TAIND_SUM9, RETRO_TAIND_SUM10,
RETRO_TAIND_SUM11, RETRO_TAIND_SUM12,RETRO_TAIND_SUM13,
RETRO_TAIND_SUM14, RETRO_TAIND_MF1,
RETRO_TAIND_MF2,RETRO_TAIND_FATAL_IND

RETRO_TA
RETRO_TA_AGY, RETRO_TA_SSN, RETRO_TA_SEQ, RETRO_TA_DAY, RETRO_TA_CD,
RETRO_TA_HRS,RETRO_TA_ERR1, RETRO_TA_ERR2, RETRO_TA_ERR3

Reference Table Data - Accounting Data (at Fund Year, Fund Code, etc. level (not per employee); Block address -- required by ETAMS to know the facility a new employee should be assigned.

TBL_ACCTG_DIST
TBL_ACCTG_DIST_SERV_CD, TBL_ACCTG_DIST_REGION,
TBL_ACCTG_DIST_FUND_CD,TBL_ACCTG_DIST_BUDGET_ACT,
TBL_ACCTG_DIST_ORG_CD, TBL_ACCTG_DIST_FUNC_CD,TBL_ACCTG_DIST_WRK_LOC,
TBL_ACCTG_DIST_CRAFT_CD,
TBL_ACCTG_DIST_GL_DEBIT,TBL_ACCTG_DIST_SUBELE_CD,
TBL_ACCTG_DIST_OBJ_CLASS

TBL_ACCTG_DIST_FUND_YR
TBL_AD_FUND_YR_AGY, TBL_AD_FUND_YR_FUND_CD,

TBL_AD_FUND_YR_YEAR_CD,TBL_AD_FUND_YR_BUDGET_ACT,
TBL_AD_FUND_YR_COMMIT_IND,TBL_AD_FUND_YR_SERV_PREFIX,
TBL_AD_FUND_YR_BBFY, TBL_AD_FUND_YR_EBFY

TBL_BLOCK_ADDR
TBL_BLOCK_ADDR_AGY, TBL_BLOCK_ADDR_BLOCK_CUR,
TBL_BLOCK_ADDR_NAME,TBL_BLOCK_ADDR_STREET1, TBL_BLOCK_ADDR_STREET2,
TBL_BLOCK_ADDR_CITY,TBL_BLOCK_ADDR_STATE, TBL_BLOCK_ADDR_ZIP1,
TBL_BLOCK_ADDR_ZIP2,TBL_BLOCK_ADDR_SUPVR_CD,
TBL_BLOCK_ADDR_SUPV_NAME,TBL_BLOCK_ADDR_SUPV_PHON,
TBL_BLOCK_ADDR_TKR_NAME,TBL_BLOCK_ADDR_TKR_PHONE,
TBL_BLOCK_ADDR_MES_TEXT,TBL_BLOCK_ADDR_ETAMS_IND

Instructions:

1. This workbook is merely a template, you must customize it to your acquisition based on the number of peri
2. If you have more than one Labor CLIN, my advice is to have a separate workbook for each CLIN. Otherwise, more straightforward and organized.
3. This workbook was also formulated assuming you have a CPAF order. If it is CPFF, you must edit each task s
4. The first two worksheets are sample sheets meant to be deleted (along with this sheet) prior to release of t sheets. There is a summary sheet example and a task sheet example.
5. Make sure you also rename each worksheet Tab appropriately.

iods of performance and the numbers of Tasks in your RFQ/TOR.
there are so many worksheets it can be confusing. Having two makes it

sheet.
the RFQ/TOR. Their purpose is to show what needs to be customized on ALL

OMB Approval 2700-0042

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE	PAGE	OF	PAGES
	1		1

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. *(If applicable)*
Amendment 01	**August 11, 2016**		**2016007GS**

6. ISSUED BY CODE

General Services Administration
FEDSIM Acquisition/Millicent Hawkins 703 605-3654
1800 F Street, NW
Washington, DC 20405

7. ADMINISTERED BY *(If other than Item 6)* CODE

8. NAME AND ADDRESS OF CONTRACTOR

CODE FACILITY CODE

(☐) 9A. AMENDMENT OF SOLICITATION NO.

GSC-QF0B-16-33040

9B. DATED ***(SEE ITEM 11)***

July26, 2016

10A. MODIFICATION OF CONTRACT/ORDER NO.

10B. DATED ***(SEE ITEM 13)***

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

___ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is ☐ extended, ☒ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:(a) By completing Items 8 and 15, and returning ___ copy of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATA SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and data specified.

12. ACCOUNTING AND APPROPRIATION DATA *(If required)*

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(☐) A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: *(Specify authority)* THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.

B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES *(such as changes in paying office, appropriation date, etc.)* SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).

C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:

D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor ___is not, __ is required to sign this document and return ___ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION *(Organized by UCF section headings, including solicitation/contract subject matter where feasible.)*

The purpose of this amendment is to:

1. Provide the Government response to the questions received. This Amendment also includes a revised RFQ and Attachments reflecting the changes made as a result of the received questions. Changes are noted in the RFQ with a bar in the right margin. Changes in the Attachments are presented as strike through to show the change.

All other requirements remain unchanged.

Except at provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER *(Type or print)*		16A. NAME AND TITLE OF CONTRACTING OFFICER *(Type or print)*	
		Mark Santasiero	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA BY	16C. DATE SIGNED
(Signature of person authorized to sign)		*(Signature of Contracting Officer)*	

REQUEST FOR QUOTE (RFQ)

GSC-QF0B-16-33040

General Services Administration (GSA) Human Resources (HR) and Time and Attendance (T&A) Systems, Migration and Managed Service Support

in support of:

Office of Human Resource Management (OHRM)

Issued to:
ALL CONTRACTORS UNDER GSA Schedule *738 X*
Special Item Number 595-*22 and 595-26*

The Contractor's Basic GSA Schedule contract is applicable to the Task Order that is awarded under this RFQ

Conducted under FAR 8.4.

Issued by:
General Services Administration
Federal Systems Integration and Management Center (FEDSIM)
1800 F Street, NW
(QF0B)
Washington, D.C. 20405

July 26, 2016

FEDSIM Project Number 2016007GS

1.1 ORDER TYPE

The contractor shall perform the effort required by this Task Order (TO) on a Firm-Fixed-Price (FFP) and Time and Materials (T&M) basis. The work shall be performed in accordance with all Sections of this TO and the offeror's General Services Administration (GSA) Multiple Award Schedule (MAS), under which the resulting TO will be placed. An acronym listing to support this Request for Quote (RFQ) is included in Section 9 - List of Attachments, Attachment B).

1.2 SERVICES AND PRICES

Although long-distance travel may be reimbursed, the contractor shall not be reimbursed for local travel. Local travel is defined as: (1) travel within a 50 mile radius of the job site, (2) 50 miles from the employee's residence, (3) travel to and from the employee's residence and the job site, and (4) travel between the contractor's offices and travel between contractor's office and the work site.

Travel shall be pre-approved by the Federal Systems Integration and Management Center (FEDSIM) Contracting Officer's Representative (COR). For travel reimbursement, the contractor shall submit a Trip Report to include travel expenses to the COR for audit. Travel shall not exceed the awarded not to exceed (NTE) amounts.

The following abbreviations are used in this price schedule:

CABS	Commissions and Boards
CLIN	Contract Line Item Number
FFP	Firm-Fixed-Price
NCUA	National Credit Union Administration
NTE	Not-to-Exceed
ODC	Other Direct Costs
OPM	Office of Personnel Management
RRB	Railroad Retirement Board
T&M	Time and Materials
USIP	United State Institute of Peace

1.2.1 BASE PERIOD: 6-Month Period

MANDATORY T&M CLIN

CLIN	Description	Total Hours	Total NTE Ceiling
0001	Phase 1- Fit/Gap Analysis, Proof of Concept, and BPR Planning (Tasks 1 and 2)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
0009	Long-Distance Travel	NTE	$160,000
0010	ODCs	NTE	$ 3,500

TOTAL BASE PERIOD CLINs: $ _____

1.2.2 FIRST OPTION PERIOD: 12-Month Option Period to start when CLIN 1 is completed.

MANDATORY T&M CLINs

T&M CLINS CLIN	Description	Total Hours	Total NTE Ceiling
1002	Phase 2 – HR and T&A Migration (Tasks 1,3,4,5,6,8)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
1009	Long-Distance Travel	NTE	$200,000
1010	ODCs	NTE	$ 3,500

TOTAL FIRST OPTION PERIOD CLINs: $_____

1.2.3 SECOND OPTION PERIOD: 6-Month Option Period

MANDATORY T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
2002	Post-Migration Support (Tasks 1,3,4,5,6,8)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
2003*	GSA Managed Services (including CABS) (Task 1,7,8)	6	Month	$
2004	OPM Managed Services (Tasks 1,7,8)	6	Month	
2005	NCUA Managed Services (Tasks 1,7,8)	6	Month	
2006	RRB Managed Services (Tasks 1,7,8)	6	Month	
2007	USIP Managed Services (Tasks 1,7,8)	6	Month	

*Note: CLIN X003 will become mandatory in future option periods

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
2008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
2009	Long-Distance Travel	NTE	$192,000
2010	ODCs	NTE	$ 3,500

TOTAL SECOND OPTION PERIOD CLINs: **$_____**

1.2.4 THIRD OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
3003	GSA Managed Services (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
3004	OPM Managed Services (Tasks 1,7,8)	12	Month	
3005	NCUA Managed Services (Tasks 1,7,8)	12	Month	
3006	RRB Managed Services (Tasks 1,7,8)	12	Month	
3007	USIP Managed Services (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
3008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
3009	Long-Distance Travel	NTE	$50,000
3010	ODCs	NTE	$ 3,500

TOTAL THIRD OPTION PERIOD CLINs: **$_____**

1.2.5 FOURTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
4003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
4004	OPM (Tasks 1,7,8)	12	Month	
4005	NCUA (Tasks 1,7,8)	12	Month	
4006	RRB (Tasks 1,7,8)	12	Month	
4007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
4008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
4009	Long-Distance Travel	NTE	$51,500
4010	ODCs	NTE	$ 3,500

TOTAL FOURTH OPTION PERIOD CLINs: $_____

1.2.6 FIFTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
5003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
5004	OPM (Tasks 1,7,8)	12	Month	
5005	NCUA (Tasks 1,7,8)	12	Month	
5006	RRB (Tasks 1,7,8)	12	Month	
5007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
5008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
5009	Long-Distance Travel	NTE	$53,045
5010	ODCs	NTE	$ 3,500

TOTAL FIFTH OPTION PERIOD CLINs: **$_____**

1.2.7 SIXTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
6003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
6004	OPM (Tasks 1,7,8)	12	Month	
6005	NCUA (Tasks 1,7,8)	12	Month	
6006	RRB (Tasks 1,7,8)	12	Month	
6007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
6008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
6009	Long-Distance Travel	NTE	$54,637
6010	ODCs	NTE	$ 3,500

TOTAL SIXTH OPTION PERIOD CLINs: **$_____**

1.2.8 SEVENTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
7003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
7004	OPM (Tasks 1,7,8)	12	Month	
7005	NCUA (Tasks 1,7,8)	12	Month	
7006	RRB (Tasks 1,7,8)	12	Month	
7007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
7008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
7009	Long-Distance Travel	NTE	$56,277
7010	ODCs	NTE	$ 3,500

TOTAL SEVENTH OPTION PERIOD CLINs: $_____

1.2.9 EIGHTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
8003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
8004	OPM (Tasks 1,7,8)	12	Month	
8005	NCUA (Tasks 1,7,8)	12	Month	
8006	RRB (Tasks 1,7,8)	12	Month	
8007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
8008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
8009	Long-Distance Travel	NTE	$57,996
8010	ODCs	NTE	$ 3,500

TOTAL EIGHTH OPTION PERIOD CLINs: $_____

1.2.10 NINTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
9003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
9004	OPM (Tasks 1,7,8)	12	Month	
9005	NCUA (Tasks 1,7,8)	12	Month	
9006	RRB (Tasks 1,7,8)	12	Month	
9007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
9008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
9009	Long-Distance Travel	NTE	$59,705
9010	ODCs	NTE	$ 3,500

TOTAL NINTH OPTION PERIOD CLINs: $_____

1.2.11 TENTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
1103	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
1104	OPM (Tasks 1,7,8)			
1105	NCUA (Tasks 1,7,8)			
1106	RRB (Tasks 1,7,8)			
1107	USIP (Tasks 1,7,8)			

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
1108	Enhancements, Future System Functionality, and Other Services (Task 9	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
1109	Long-Distance Travel	NTE	$61,497
1110	ODCs	NTE	$ 3,500

TOTAL NINTH OPTION PERIOD CLINs: **$_____**

GRAND TOTAL ALL CLINs: **$_____**

1.3 SECTION 1 - SUPPLIES OR SERVICES AND PRICE/COSTS TABLES

1.3.1 INDIRECT/MATERIAL HANDLING RATE

Long-Distance Travel and ODC costs incurred may be burdened with the contractor's indirect/material handling rate in accordance with the contractor's disclosed practices.

a. If no indirect/material handling rate is allowable in accordance with the contractor's disclosed practices, no indirect/material handling rate shall be applied to or reimbursed on these costs.

b. If no rate is specified in the Basic Contract, no indirect rate shall be applied to or reimbursed on these costs.

c. If no rate is specified in the schedule of prices above, no indirect rate shall be applied to or reimbursed on these costs.

The indirect handling rate over the term of the TO shall not exceed the rate specified in the schedule of prices above.

1.3.2 LIMITATION ON OTHER DIRECT COSTS

ODCs incurred on GSA Schedule TOs are limited to a maximum of $3,500 over the life of the TO.

1.3.3 TIME & MATERIAL LABOR MIX AND LEVEL OF EFFORT

The labor mix and level of effort specified in the contractor's quote and incorporated into this Order are for estimation purposes. The contractor may re-allocate, with prior written approval of the FEDSIM COR, the number of hours by labor category, within each labor CLIN as needed to effectively manage the project, provided the total funded labor cost and total hours are not exceeded. Any additional labor categories or increases to total hours or increases to ceilings required during performance must be approved by the Contracting Officer (CO) and added to the TO by modification.

1.4 INCREMENTAL FUNDING

1.4.1 INCREMENTAL FUNDING LIMITATION OF GOVERNMENT'S OBLIGATION

Incremental funding in the amount of $XX,XXX,XXX for CLINs 0001, 0009, and 0010, is currently allotted and available for payment by the Government. Additional incremental funding for these CLINs will be allotted and available for payment by the Government as the funds become available. The estimated period of performance covered by the allotments for the mandatory CLINs is from award through six months. The TO may be modified to add funds incrementally up to the maximum of $***,***,*** over the performance period of this TO. These allotments constitute the estimated cost for the purpose of Federal Acquisition Regulation (FAR) Clause 52.232-22, Limitation of Funds, which applies to this TO on a CLIN-by-CLIN basis.

Incremental Funding Chart

See Section 9, Attachment U - Incremental Funding Chart (Excel Spreadsheet).

2.1 BACKGROUND

For more than half a century, the GSA has carried out a mission of servicing other Federal agencies by providing superior workplaces, quality acquisition services, and expert business solutions. In alignment with the agency mission, GSA requested and received designation in 2010 as a Human Resources (HR) Line of Business (LOB) Shared Service Center (SSC). GSA currently provides HR, Time and Attendance (T&A), payroll systems, and back-office business operational services to GSA and 32 external client agencies, including approximately 21,000 employees. Client agencies include small and medium-size Federal agencies such as Office of Personnel Management (OPM) and small Presidential Commissions and Board Services (CABS). Some of the external agencies and CABS have their own staffs that provide HR and T&A back-office operational services/functions and use GSA's systems, while others are serviced by GSA. In the latter case, GSA employees perform the functions on behalf of the CABS.

The current systems result in delays, handoffs, errors, data inconsistencies, dual data entry, and the implementation of many manual processes to make up for deficient levels of automation. This results in the inefficient use of senior resources to address and correct errors and inconsistencies and respond to employee inquiries about the errors.

In an effort to strengthen its focus on its core missions, GSA made the decision to divest its technology services related to HR LOB Shared Services and procure the services of an Office of Management and Budget (OMB) and OPM-approved private SSC that shall migrate GSA and its 32 external customers to a managed service solution for HR and T&A systems. GSA will retain its Payroll LOB status and will continue to provide back-office business operational services to its current internal and external customers, utilizing the new systems.

GSA is leading the effort to migrate, along with other external entities that it services, from its internal systems to a contractor solution. GSA and the existing entities it services today will migrate to the new solution, segregated into five different future environments in a manner to be designed by the contractor.

Although GSA is managing the migration, the shared services contractor shall serve five distinct entities post-implementation; specifically:

1. GSA (includes CABS and other very small Government Executive organizations)
2. OPM
3. National Credit Union Administration (NCUA)
4. Railroad Retirement Board (RRB)
5. United States Institute of Peace (USIP)

Post-migration, the HR LOB SSC roles and responsibilities move from GSA to the private SSC contractor. GSA will retain its Payroll LOB status and, as such, will continue to provide payroll back-office business operational services to its current internal and external customers, utilizing the new systems in the five environments to do so.

As an HR LOB Shared Services Provider, the contractor shall offer solutions that align to the Chief Human Capital Officers' (CHCO) visions and goals.

2.1.1 FUTURE REQUIREMENTS

GSA envisions a solution to promote economies of scale across the five agencies while allowing each agency the ability to configure in accordance with specific agency requirements.

The new solution must integrate with GSA systems, including payroll and systems of the other four entities, and provide various output files to satisfy reporting and other entity requirements.

Post-migration, each of the five agencies shall be treated as separate entities, leveraging common infrastructure and applications where feasible, while allowing each entity to establish the technical requirements of their environments over the life of the contract. A single solution and TO will be developed and administered by GSA FEDSIM. Once the HR and T&A migration has been completed, GSA and the other four entities may determine the appropriate strategy for replacing or retaining any remaining systems and automating current manual processes. GSA and the other entities may evaluate and potentially add functionality for other HR-related systems available through or from the new SSC, as well as directly from other system contractors. Any of the five entities may engage with the contractor for additional services to assist with any of these or other HR-related technology initiatives.

Although the Government anticipates one solution, the five entities shall each establish the technical requirements of their environments. Implications of establishing five different environments include:

a. If an entity requests the enablement of additional features, reports, or extensions to the software to provide additional functionality (not available through configuration), the requesting development and implementation shall occur in only their environment, unless another entity requests the same change in their environment.
b. No one entity would be impacted by actions of the other entities.
c. Entities can configure and use their own testing, training, and production environments as they see fit.
d. If an entity is implementing a change and has the environment offline, the others are not impacted.
e. If one entity's environment is down, the others may not necessarily be down.
f. Entities can have their own/unique security solution such as single sign-on.
g. Authority to Operate (ATO) requirements would be defined by each entity.
h. Entities will have their own help desk environments and processes as well as incident management processes, including different phone numbers, voice response scripts, help desk electronic mail (email) addresses, etc.

Contractors shall provide a cost-effective solution that allows for variation across the five entity environments.
In addition, over time, any of the five entities may request the expansion of already existing services, such as increasing help desk services, hosting, managed services, or software and tools.

The contractor shall also support GSA with onboarding new CABS to the GSA environment, and likewise, migrating CABS off the GSA environment if they are disbanded or move to another service provider. In some cases, new CABS may be large enough to substantiate a new, separate environment to allow that larger entity to set the future direction of its environment, in the same manner that the original five entities are setting unique directions.

2.1.2 PURPOSE

The purpose of this TO is to provide HR and T&A solutions and associated managed services that shall support GSA core HR and T&A business functions.

2.1.3 AGENCY MISSION

GSA was established by President Harry Truman on July 1, 1949, to streamline the administrative work of the Federal Government. GSA consolidated the National Archives Establishment, the Federal Works Agency, and the Public Buildings Administration; the Bureau of Federal Supply and the Office of Contract Settlement; and the War Assets Administration into one Federal agency tasked with administering supplies and providing workplaces for Federal employees.

Today, through its two largest offices - the Public Buildings Service and the Federal Acquisition Service - and various staff offices, GSA provides workspace to more than one million Federal civilian workers, oversees the preservation of more than 480 historic buildings, and facilitates the Federal Government's purchase of high-quality, low-cost goods and services from quality commercial contractors.

2.2 SCOPE

The general scope for this acquisition is to migrate GSA and its current customers from GSA's internal HR & T&A systems to an OPM- and OMB-approved private SSC contractor-managed shared services solution for the five entities as defined herein (Section 2.1).

a. Phase 1 entails conducting a fit/gap analysis, developing a proof of concept, planning for future Business Process Realignment (BPR) activities, and associated program management tasks.

b. Phase 2 is the migration from GSA's current systems to a contractor-managed solution consisting of five distinct entity environments.

c. Phase 3 is post-migration, and includes the associated managed services that shall support the implemented HR and T&A solutions as well as optional CLINs for potential additional work in the distinctive environments. This phase shall also include post-migration support activities.

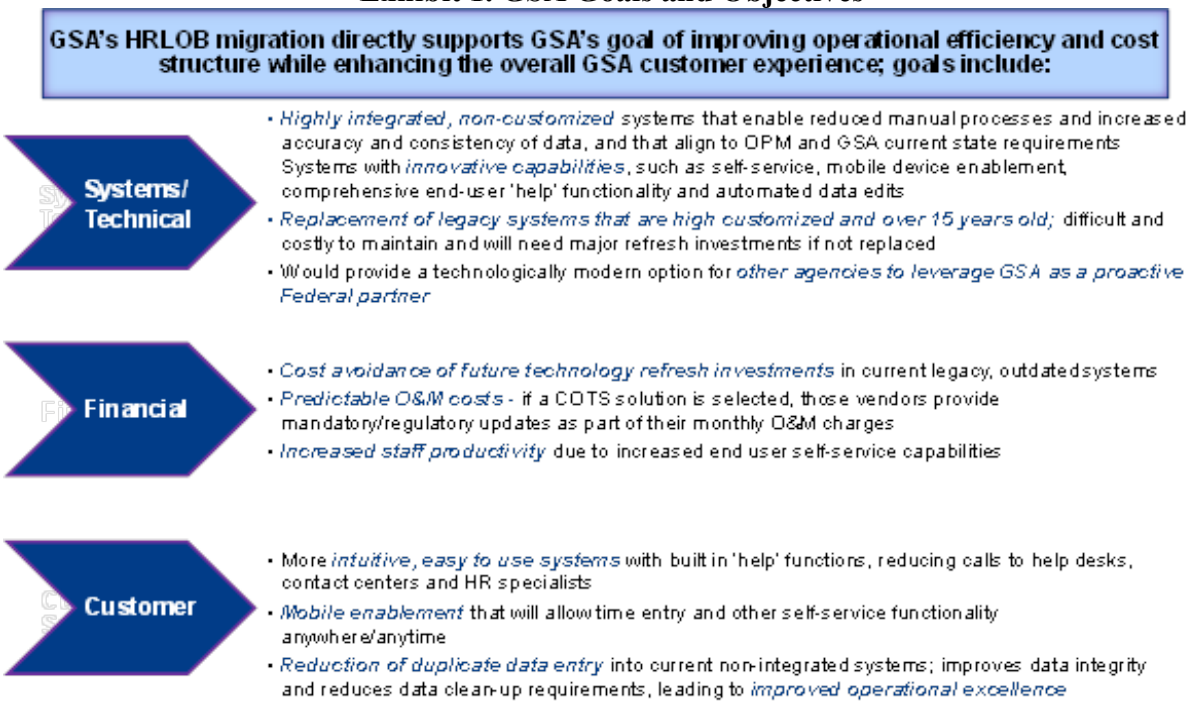
GSA's HR and T&A functional requirements, which define what the system must do, primarily fall within four HR LOB sub-functions—Personnel Action Processing, Benefits Management, Organization and Position Management, and Compensation Management-T&A. In addition, GSA requires interfaces with its HR-related systems, including a payroll system. Other sub-function requirements can be found in Section 9-Attachments L and M.

The contractor shall implement to the maximum extent practicable Commercial Off-the-Shelf (COTS) products tailored through configurations or extensions that reside outside of the base COTS software. The contractor's solution for meeting the HR and T&A system requirements shall accommodate this strategy. The contractor shall follow an Enterprise Program Lifecycle framework applicable for an implementation of this size and complexity (such as a Systems Development Life Cycle (SDLC) tailored for a large Enterprise Program.

The contractor shall perform the tasks and subtasks as defined in Section 1, which shall prepare and then transition GSA and its current customers to the new solution in the five environments. The contractor shall train all employees of GSA and its current customers in its new solutions prior to the final migration. The list of current customers and the number of employees for each system can be found in Section 9 – List of Attachments, Attachment K.

The following sections summarize some of the key functional and nonfunctional requirements. Highlights of GSA's goals and objectives are noted in Exhibit 1.

Exhibit 1. GSA Goals and Objectives



2.2.1 FUNCTIONAL REQUIREMENTS - HR AND T&A

The following sub-sections summarize some of the key functional requirements for HR and T&A. These requirements are to be interpreted in collaboration with the detailed requirements, are defined in attachments to the solicitation, and take precedence over the general descriptions below (Section 9 – List of Attachments, Attachments L, M, O, P, Q, R, S, T). The Attachments contain both requirements that apply to all entities/agencies covered by this procurement and entity-specific requirements. The Attachments clearly note to which entities/agencies the requirements apply. The functional requirements in the Attachments consist of both core and non-core functionality, as defined by OPM's HR LOB Business Reference Model (BRM). The Attachments contain all of the requirements, regardless of designation, in order for GSA to decommission the existing systems that are being replaced by the new contractor solution.

2.2.1.1 PERSONNEL ACTION PROCESSING

OPM Definition: The OPM's Guide to Processing Personnel Actions defines a Personnel Action as "the process necessary to appoint, separate or make other personnel changes." The concept of

personnel action is not specific to a single HR LOB BRM sub-function. Rather, it is a concept converging with multiple activities across the BRM – activities resulting in a change to employee status or other key employee data.

GSA Requirement: The new HR system shall provide a solution that offers the capability to initiate and process a personnel action. The solution shall use automated workflow to route the personnel action through its approval sequence and provide appropriate notifications. It shall seamlessly connect to GSA HR systems and other eGov HR systems.

2.2.1.2 BENEFITS MANAGEMENT

OPM Definition: The HR LOB BRM defines the sub-function Benefits Management as "designs, develops and implements benefit programs to attract, retain and support current and former agency employees. This sub-function includes: establishing and communicating benefits programs, processing benefits actions, and interacting as necessary with third-party benefits providers."

GSA Requirement: The new HR solution shall provide a solution that offers web-based employee self-service capabilities for benefits enrollment. For Government-wide benefits programs, plus selected entity-specific benefits programs, the contractor shall activate benefits enrollments based on predefined business rules and make benefits participation data available to payroll and to benefits providers. The solution shall provide employee access to frequently asked benefit questions and answers that may assist employees during a benefit election period.

2.2.1.3 ORGANIZATION AND POSITION MANAGEMENT

OPM Definition: The HR LOB BRM defines the sub-function Organization and Position Management as "designs, develops and implements organizational and position structures that create a high-performance, competency-driven framework that both advances the agency mission and serves agency human capital needs."

GSA Requirement: The Organization and Position Management sub-function is closely tied to several other sub-functions. Notably, the common job descriptions that result from this sub-function shall be available for use by other BRM sub-functions.

The HR solution shall provide the ability to capture data related to:

a. Standardized skill and competency definitions to the HR Strategy sub-function.
b. Inventories of skills to be embedded in job requirements for the Staff Acquisition sub-function.
c. The competencies and skills that provide a basis for assessing individual performance and identifying individual employee development needs for the Performance Management sub-function.

2.2.1.4 COMPENSATION MANAGEMENT – T&A

OPM Definition: These are scheduling tools that support work schedules and tours of duty, specific employee schedule by time-period, rescheduling, comments, and project labor cost analysis. The solution shall provide a view of scheduled leave across groups of employees and shall identify not-to-exceed exceptions by project, group of employees, or position. The tool shall allow time to be entered electronically (e.g., web-based capability, badge swipes, mobile

devices) and on an exception basis as appropriate. The capability shall exist to associate time, by code or employee, with a project code.

GSA Requirement: The solution shall be a web-based time and overtime entry and approval system that uses electronic workflow to manage the approval process. The solution shall accommodate out-of-office situations, moving the approval through an alternative routing. The solution shall send notifications regarding overdue actions or approvals. It shall make time data available to payroll and the general ledger and provide visibility into time data for employees and managers.

The solution shall facilitate the collection, scheduling, request, and approval of employee leave and attendance. The solution shall be role based, where role definitions can be configured within specific parameters to meet agency business practices and needs and can allow for access at the employee level to input and request time, leave, telework, and schedule changes. Roles shall be defined and limited to view specific assigned employees, agency defined organizations, or a combination of the two.

The solution shall provide a full and complete audit record – date and time stamping – of every action utilized in the application and taken by the end user. In addition, functionality to support Voluntary Leave Transfer Programs is desired. This program lets employees donate annual leave to other employees who are experiencing a medical emergency.

2.2.1.5 COMPENSATION MANAGEMENT – PAYROLL INTERFACE

The HR LOB BRM defines the sub-function Compensation Management as "the adoption of non-discretionary (Government-wide), agency-discretionary and alternative compensation programs that are fair and equitable, and that promote employee retention. Award and bonus payout strategies are devised and administered. Work schedules are established and time worked is recorded and approved. Leave taken is reconciled against leave accrued to determine leave balances. Payroll is processed and reconciled, and employee pay and other third-party disbursements are generated. Labor costs are distributed, as appropriate, to the appropriate cost accounts."

GSA Requirement: GSA currently uses the Payroll Accounting and Reporting (PAR) system for its payroll processing. However, GSA is also considering replacing PAR at a currently undetermined future date. The contractor shall provide interfaces from the new HR and T&A solutions to the payroll system in place at the time of implementation.

2.2.2 OTHER FUNCTIONAL REQUIREMENTS (HR AND T&A)

2.2.2.1 MOBILE ENABLED SOLUTION

The HR and T&A solution shall be mobile enabled and specifically designed and optimized for use on various mobile devices and their respective operating systems, such as tablets and smart phones (Windows, Android, and iOS).

2.2.2.2 SELF-SERVICE CAPABILITIES

GSA would like to enable employees to manage their personnel and payroll information. For example, the solution shall provide access to information related to earnings, taxes, benefits, and

vacation leave balances and allow employees to update information for their tax withholding, direct deposits, and retirement fund allocations.

2.2.2.3 INTEGRATED, CONTEXT-BASED HELP FUNCTIONALITY

To aid in the adoption of self-service functionality, it is important that employees have quick access to content that provides guidance on how to execute a certain function or explain a particular data element. This content shall be available while in the middle of a transaction/function without moving to a separate portion of the system. The help content could be supplemented with content that is more comprehensive in a Knowledge Management capability as described herein.

2.2.2.4 INTEGRATED TRAINING MATERIALS

Users shall have quick access to training material content that provides guidance on how to navigate the system, execute functions, and explain data elements. Users need to refresh the knowledge gained from their initial training class. New employees need a quick way to get up-to-speed on the systems they are expected to use. Training classes may not always be available post-migration so it is important that materials be organized, maintained, and available directly in the system. Training materials shall also be incorporated into a Knowledge Management capability as described below.

2.2.2.5 KNOWLEDGE MANAGEMENT CAPABILITIES

Similar to providing 'Help' and integrated training materials, having access to a broader set of documentation shall aid employees in researching not only how to perform a function in the system (help and training content), but also in locating business process, procedure, and policy-related documentation that they need to perform their jobs. The new solution shall provide a knowledge management repository where agencies can store system specific materials (business process training materials, policies, processes, and procedures, etc.), that supplement the contractor-provided training and help materials.

2.2.2.6 REPORTING, ANALYTICS, AND DASHBOARDS

The contractor shall build out functionality that meets reporting requirements. In addition, the solution shall have ad hoc reporting capabilities with user roles and authorizations that control the levels of report and data access, and reporting functionality, such as the ability to create a report, save as a template, print, download to desktop, export, or view-only.

The contractor shall provide easily configurable dashboards that can graphically represent business metrics and provide business performance measurements, as is common to business intelligence, information technology (IT), and performance management software.

In addition, the contractor shall provide a repository to index and store both production and ad-hoc reports in an organized manner for easy access.

2.2.2.7 SYSTEM INTERFACES AND EXTRACTS

The contractor shall develop, implement, and maintain interfaces and extracts identified and described in interface control and/or design documents provided by GSA (Section 9 – List of Attachments, Attachments O, P, Q, R, S, and T).

2.3 CURRENT IT/NETWORK ENVIRONMENT

The systems described below are the current core systems that shall be replaced by new systems as a result of this acquisition. There are also many ancillary/non-core HR-related systems which are integrated today into the overall HR IT environment, and shall be integrated into the new environment being procured in this solicitation.

2.3.1 CURRENT HR SYSTEM

Today, GSA uses the Comprehensive Human Resources Integrated System (CHRIS) to provide the core HR technology processing activities. CHRIS is based on a COTS product developed by Oracle. GSA purchased the commercial version of the Oracle HR software and in October 1998, purchased the Federal version of the Oracle Federal Human Resources (OFHR) software. OFHR contains the Federal HR functionality and complies with the OPM's Guide to Processing Personnel Actions and the Guide to Personnel Data Standards, as well as other mandated personnel regulations, which change over time. GSA continues to develop customized OFHR functionality to meet GSA and its client agencies' changing business needs and process flow requirements. CHRIS has interfaces to GSA's PAR and supports the hosting of e-Government (eGov) initiatives through direct data feeds to OPM and its service providers. CHRIS interfaces with many other systems to perform the previously described functions.

GSA also provides transactional processing and support from its centers of expertise in personnel action, benefits, and retirement processing, known as the Consolidated Processing Center (CPC) as well as other functional support teams. The CPC offers GSA and its small client agencies a full range of systems and support services for transactional processing, benefits management, worker's compensation, maintenance of Official Personnel Folders (OPFs), and retirement services and retirement counseling. The CPC provides nationwide support and is co-located with GSA's Payroll Services Branch (PSB) for quick reconciliation of incidents. The CPC offers a benefits helpdesk available during business hours via phone or email, which is staffed by experienced retirement and benefits specialists.

2.3.1.1 CURRENT PAYROLL SYSTEM

GSA's current PAR system captures, validates, and processes payroll and disbursement data for a given pay period by gathering data on employee time worked and leave taken, calculating gross pay, and processing deductions and taxes to calculate net pay. Interfaces between the Payroll, HR and T&A systems are real-time.

The PAR System was designed, developed, and is maintained by GSA and has been operational since 1995. The system provides a web-based interface for GSA's PSB personnel to update and maintain payroll accounts. Security is controlled by the PSB team and is sufficiently flexible to support all business processes. The system is table-driven to facilitate real-time data updates and maintenance. PAR is accessible via Oracle Forms launched from a web browser.

2.3.2 CURRENT T&A SYSTEM

GSA currently uses the Electronic Time and Attendance System (ETAMS), a GSA-developed T&A system. Employees input T&A data into ETAMS, and ETAMS then submits the data to PAR electronically. GSA performs the necessary operational reviews of the employee pay and leave information for the current pay period and initiates the final payroll calculation process for

that pay period. The new T&A system shall be able to electronically send and receive information on a real-time basis with GSA's payroll and new HR system and provide robust data edit checking before committing incoming data to the T&A databases.

In addition to requiring a new T&A system, GSA requires functionality similar to its Authorized Leave and Overtime Help Application (ALOHA). ALOHA allows an automated way of capturing leave request and overtime request information without having to save email records or paper forms and have the information stored to meet data retention of such requests in accordance with T&A regulations. The new HR and T&A system shall seamlessly provide this functionality so that ALOHA can be decommissioned.

2.4 OBJECTIVE

The objective of this TO is to provide managed services that support GSA core HR and T&A business functions. The solutions shall provide self-service capabilities supported by widespread, integrated help and knowledge management functionality.

2.5 TASKS

a. Task 1 – Provide Program Management
b. Task 2 – Conduct Fit/Gap Analysis, Execute a Proof of Concept and Begin BPR Planning
c. Task 3 – Establish and Manage a Pre-Migration Hosting Environment
d. Task 4 – Pre-Migration Preparation of Systems
e. Task 5 – Prepare and Deliver Training
f. Task 6 – Migrate, Support, and Stabilize Systems
g. Task 7 – Provide Managed Service Support
h. Task 8 – Provide Security Management
i. Task 9 – Enhancements, Future System Functionality, and Other Services

2.5.1 TASK 1 – PROVIDE PROGRAM MANAGEMENT

The contractor shall provide program management support. This includes the management and oversight of all activities performed by contractor personnel, including subcontractors, to satisfy the requirements identified in this Performance Work Statement (PWS). This also includes program management, schedule management, quality management, change management, communications, and risk and issue management. The contractor shall identify a Program Manager (PM) by name who shall provide management, direction, administration, quality control, and leadership of the execution.

2.5.1.1 SUBTASK 1 – COORDINATE A PROJECT KICK-OFF MEETING

The contractor shall schedule and coordinate a Project Kick-Off Meeting at the location approved by the Government. The meeting shall provide an introduction between the contractor personnel and Government personnel who will be involved with the TO. The meeting shall provide the opportunity to discuss technical, management, and security issues, and travel authorization and reporting procedures. At a minimum, the attendees shall include Key contractor Personnel, representatives from the directorates, other relevant Government personnel, and the FEDSIM COR. The contractor shall provide the following at the Kick-Off Meeting:

a. Draft Project Management Plan (PMP)
b. Final Quality Control Plan (QCP)
c. Spend Plan Draft, which shall include, at a minimum, estimates of planned expenditures for the base year by month.

2.5.1.2 SUBTASK 2 – PREPARE A MONTHLY STATUS REPORT (MSR)

The contractor PM shall develop and provide a Monthly Status Report (MSR) (Section 9 - List of Attachments, Attachment C) using Microsoft (MS) Office Suite applications via email to the Technical Point of Contact (TPOC) and the FEDSIM COR. The MSR shall include the following:

a. Activities during reporting period, by task (include on-going activities, new activities, and activities completed, and progress to date on all above mentioned activities). Each section shall start with a brief description of the task.
b. Problems and corrective actions taken. Also include issues or concerns and proposed resolutions to address them.
c. Personnel gains, losses, and status (security clearance, etc.).
d. Government actions required.
e. Schedule (show major tasks, milestones, and deliverables; planned and actual start and completion dates for each).
f. Summary of trips taken, conferences attended, etc. (attach trip reports to this MSR for reporting period).
g. Accumulated invoiced cost for each CLIN up to the previous month.
h. Projected cost of each CLIN for the current month.
i. Contractor risks and issues related to managing the contract.

2.5.1.3 SUBTASK 3 – CONVENE TECHNICAL STATUS MEETINGS

The contractor PM shall convene weekly Technical Status Meetings with the Government stakeholders. The purpose of this weekly status meeting is to ensure all stakeholders are informed of the project status. The contractor shall provide a Weekly Status Report that includes at minimum:

a. Project Status
b. Schedule changes
c. Key weekly activities
d. Issues and Risks
e. Other pertinent information

2.5.1.4 SUBTASK 4 – PREPARE A PROJECT MANAGEMENT PLAN (PMP)

The contractor shall develop, deliver and update, a PMP that lays out its approach, timeline, and tools to be used in execution of the contract. The PMP shall provide the foundational definitions for managing the program and shall include and reference several other plans, including a Communications Plan, Staffing Management Plan, Risk Management Plan and Issue/Risk Log,

QCP, resource-loaded Integrated Master Schedule (IMS), and Change Management Plan. The plans shall take the form of both a narrative and graphic format that displays the schedule, milestones, risks, and resource support. The PMP shall also include how the contractor shall coordinate and execute planned, routine, and ad hoc data collection reporting requirements, including those required by the contractual deliverables. Where applicable, these plans shall reference similar plans as developed by the entity. The initial baseline PMP shall be concurred upon by the FEDSIM COR and TPOC. Weekly updates of some PMP sections may be required by the Government.

The IMS shall include, when applicable, the deployment/cutover tasks and schedule.

2.5.1.4.1 PREPARE A COMMUNICATIONS PLAN

The contractor shall prepare a Communications Plan that describes in detail the modes, methods, and messages provided to keep entity stakeholders informed of the program's progress. This plan shall identify, at a minimum, individuals or groups, the mode of communication used with each group, the nature of the message (summary and detail), and the frequency and timing of the communication. The contractor shall update the plan upon changes to stakeholder groups or communications needs. The contractor shall prepare communications content and/or materials as defined in the Communications Plan.

In addition, the contractor shall prepare a Migration Communications Plan that addresses the means of communicating specific migration related activities to individual entities.

2.5.1.4.2 STAFFING MANAGEMENT PLAN

The Staffing Management Plan shall include project roles, responsibilities, and reporting relationships in both a table format as well as in an organizational chart. The Staffing Management Plan shall also identify resources utilized throughout the project life cycle. A Responsible, Accountable, Consulted, Informed (RACI) matrix identifying the Key Personnel shall also be included in the plan.

2.5.1.4.3 RISK MANAGEMENT PLAN AND ISSUE/RISK LOG

The contractor shall establish and maintain a Risk Management Plan and a comprehensive Issue/Risk Log to track risks and assign mitigation strategies. Risks are potential future events that, if they occur, would have an impact on the project, or the successful operation of the system, whereas issues are events that have occurred and must be resolved as soon as possible. The contractor shall perform an initial risk assessment jointly with the entities, identifying and assessing the probability and impact severity of all foreseeable programmatic and technical risks, and develop mitigation strategies for high and medium exposure risks.

The Risk Management Plan shall include how risks will be identified, managed, and mitigated. The responsibilities for monitoring and review shall be clearly defined. The monitoring and review processes shall encompass, when applicable, all aspects of the risk management process for the purposes of:

a. Ensuring that controls are effective and efficient in both design and operation.
b. Obtaining further information to improve risk assessment.

c. Analyzing and learning lessons from risk events, including near-misses, changes, trends, successes and failures.
d. Detecting changes in the external and internal context, including changes to risk criteria and to the risks, which may require revision of risk treatments and priorities.
e. Identifying emerging risks.

The plan shall also include a template of the Risk Log that shall be used to track issues and risks and assign mitigation strategies to address each one. The contractor shall maintain the Issue/Risk Log and update it as needed. The Issue/Risk Log is an ongoing tool for the purposes of identifying, triaging, and managing risks. The Risk Log needs to be available, visible, and monitored at least weekly.

The contractor shall maintain and update the Risk Management Plan on an ongoing basis and conduct risk reviews at least bi-weekly during a program and during FFP tasks. The contractor shall assess and mitigate risks as mandated by the National Institute of Standards and Technology (NIST) 800-53 Revision 4, NIST 800-30, and subsequent updates.

When applicable, the contractor shall prepare a Risk Review Report that describes risks to the system and ongoing operations including near-misses, changes, trends, and emerging risks in addition to mitigation strategies and lessons learned from risk events. The report shall also include risk reduction recommendations.

2.5.1.4.4 QUALITY CONTROL PLAN (QCP)

The Government will provide the contractor with a Quality Assurance Surveillance Plan (QASP) that will be used to monitor contractor performance. The contractor shall develop and maintain a QCP that aligns to the QASP and includes performance measures defining the performance targets and metrics necessary to provide the Government with quantitative data to assess the quality of the contractor's performance.

In addition, the QCP shall discuss how the contractor shall improve and maintain quality; specifically, its:

a. Approach to planning, organizing, and managing internal resources and subcontractors, to include lines of authority.
b. Rationale for tracking and reporting progress and costs and integrating the requirements of the TO.
c. Approach to ensure that cost, performance, and schedule comply with task planning.
d. Approach to identification of and resolution of issues and problems, including escalation of procedures.
e. Approach for continuous improvement of processes and procedures used in this task.
f. Rationale for specifically assigning subcontractor responsibilities, functions, and work apportionment.

2.5.1.4.5 INTEGRATED MASTER SCHEDULE (IMS)

The Integrated Master Schedule shall include a decomposition of the major phases of a project into manageable activities and work items and facilitate the assignment of responsibilities and schedule dates to the work items. The IMS should be resource loaded and tasks should be

scheduled according to a timeline agreed upon by the Government. The IMS should include interdependencies across tasks and be able to identify critical paths. Key milestones should be identified for reporting purposes. Key tasks and milestones from projects outside of the one for which the IMS is prepared, that are major interdependencies with the project, should be incorporated and tracked with input from the Government to understand any potential impact on the project. The IMS shall include a WBS at a level of detail sufficient for it to manage work and disclose project effort and progress to the Government for each task. At a minimum the WBS shall be at level 3.

2.5.1.4.6 CHANGE MANAGEMENT PLAN

The contractor shall provide a Change Management Plan. The plan shall define activities and roles to manage and control change during all phases of the project. This shall include changes to project scope, budget, schedule, and plans to manage quality, risk, issues, and change.

2.5.1.5 SUBTASK 5 – DASHBOARDS

The contractor shall develop and maintain dashboards to monitor and report performance targets and metrics of the project and systems implemented during the project. The dashboards shall allow entities to monitor the progress and quality of delivery towards specified outcomes and project benchmarks. The contractor shall develop two types of dashboards: 1) System Performance metrics as defined by an entity and the contractor, and 2) Project Performance metrics.

2.5.1.6 SUBTASK 6 – PREPARE TRIP REPORTS

The Government will identify the need for a Trip Report when the request for travel is submitted. The contractor shall keep a summary of all long-distance travel including the name of the employee, location of travel, duration of trip, and Point of Contact (POC) at travel location.

2.5.1.7 SUBTASK 7 – TRANSITION OUT

The Transition-Out Plan shall facilitate accomplishing a seamless transition from the incumbent to an incoming contractor/Government personnel at the expiration of the TO. The contractor shall provide a Transition-Out Plan No Later Than (NLT) 90 days prior to expiration of the Base Period of Performance (POP) (Section 5 – Deliverables or Performance, Deliverable Table). The contractor shall update the Transition Plan 30 days prior to the end of each exercised option period (Section 5 – Deliverables or Performance, Deliverable Table).

The contractor shall identify how it shall coordinate with the incoming contractor and/or Government personnel to transfer knowledge regarding the following:

a. Project management processes
b. Points of contact
c. Location of technical and project management documentation
d. Status of ongoing technical initiatives
e. Appropriate contractor–to-contractor coordination to ensure a seamless transition
f. Transition of Key Personnel knowledge
g. Schedules and milestones

h. Actions required of the Government

The contractor shall also establish and maintain effective communication with the incoming contractor/Government personnel for the period of the transition via weekly status meetings.

2.5.2 TASK 2 – CONDUCT FIT GAP ANALYSIS, EXECUTE A PROOF OF CONCEPT, AND BEGIN BPR PLANNING

The contractor shall establish and provide an environment and configure the application software as needed to perform a fit/gap analysis for each system (HR and T&A). The contractor shall continue to configure the systems with the business rules identified during fit/gap in order to specify that the each of the systems meet the functional requirements established by the Government for the five entities identified (GSA with CABS, OPM, USIP, RRB, and NCUA). The contractor shall set up the environment in the manner it deems appropriate for the scope of this Task and is not required to establish five environments at this time.

The contractor shall present the results of the fit/gap analysis and produce a final Migration Plan and Schedule based on information learned during this phase. For this Task, if interfaces already exist between the systems and are available at no cost to the Government, they can be implemented to further support the configured system capabilities. At the end of Task 2, the contractor shall update the project management deliverables and IMS based on what was discovered during this Task, including determining key migration milestones for each of the five entities.

2.5.2.1 SUBTASK 1 – ESTABLISH A FIT/GAP AND PROOF OF CONCEPT ENVIRONMENT

The contractor shall install, configure, and operate the necessary hardware, software, and any other items to establish a hosting environment and services required to perform hosting-related services in a contractor-provided facility for the scope of Task 2. This includes applicable application software licenses from third parties and managing the hosting environment during Task 2. If interfaces already exist between the systems and are available at no cost to the Government, they can be implemented to further support the configured system capabilities.

2.5.2.2 SUBTASK 2 – CONDUCT FIT/GAP ANALYSIS

The contractor shall review each identified entity's system requirements and perform a fit/gap analysis against its proposed solution. The fit/gap analysis shall include proof of concept sessions to review the out-of-the-box solution against requirements and business processes and identify the fits and gaps. The contractor shall review the results of the fit/gap analysis to assess the level of effort required to meet the gaps and shall support and generate all activities necessary to conduct the fit/gap analysis for the system, including:

a. Review of functional and other requirements.
b. Identification of potential business process impact areas.
c. Conducting proof of concept sessions and demonstrating the new system capabilities and workflow.
d. Creating fit/gap analysis and comparison reports.

e. Developing the level of effort to configure and enhance (if required through an extension) the system.

The Fit/Gap Analysis Report shall include an executive summary with detailed findings and recommendations. The report shall also include the following elements:

a. Requirements review results (identifying the fits and gaps).
b. Business processes that are impacted and flagged to be part of the BPR activities.
c. Primary users and/or functional groups impacted by the gap.
d. Functional and technical gaps and a proposal for how the contractor can fill the gap (such as through an extension).

The contractor shall deploy, to the extent practicable, configured COTS products without customization of the COTS code. If, during the fit/gap analysis, it is determined that a COTS software product cannot be configured to meet certain entity-specific mandatory requirements, the contractor shall provide a plan to scope, design, develop, test, and implement extensions to the COTS product to accommodate the entity-specific mandatory functionality. These extensions shall reside outside of the COTS product and shall not interfere with or increase the difficulty of implementing future releases, upgrades, and/or patches to the COTS product.

2.5.2.3 SUBTASK 3 – CREATE AND DEMONSTRATE PROOFS OF CONCEPT

The contractor shall configure the systems with the business rules identified during fit/gap analysis in order to demonstrate that each of the systems meet the functional requirements established by the Government for the five entities identified (GSA with CABs, OPM, USIP, RRB, and NCUA). The contractor shall demonstrate configured systems in a proof of concept environment at the appropriate time during fit/gap analysis with participants and conduct a comprehensive demonstration shortly after the end of fit/gap analysis. The final proof of concept demonstration should include a presentation of the plan to scope, design, develop, test and implement each potential extension to the COTS product to accommodate the entity-specific, mandatory functionality identified during fit/gap analysis. Cost estimates shall be provided for each extension to assist the Government in evaluating each potential extension

2.5.2.4 SUBTASK 4 – PLAN FOR BUSINESS PROCESS REALIGNMENT (BPR)

The contractor shall develop a detailed BPR Plan and Schedule for executing the Phase 2 BPR subtask. Information gathered during the fit/gap analysis activities should assist in determining the extent of BPR activities in Phase 2 as well as identifying GSA and other entity stakeholders and participants needed for BPR activities. The BPR Plan and Schedule shall include meetings and working sessions identified in the schedule for the first month of the Phase 2 BPR subtask and shall be scheduled on participant calendars to ensure a quick and smooth transition into Phase 2 for BPR related activities. Materials to support BPR meetings/working sessions shall also be prepared and distributed as appropriate.

2.5.2.5 SUBTASK 5 – PREPARE AN INITIAL MIGRATION PLAN AND SCHEDULE

The contractor shall prepare an initial version of the Migration Plan and Schedule to rollout the new solutions to each entity and its end users. This Migration Plan and Schedule shall

communicate how and when the system and contractor supporting processes (such as the contractor help desk, incident management, and change management functions), where applicable, shall be deployed, installed, and/or transitioned into operation. The purpose of this Migration Plan and Schedule is to ensure all entity stakeholders are aware of the details, requirements, and responsibilities involved in successfully completing this project and migrating the product to the Government's end-users.

The Initial Migration Plan and Schedule shall provide detailed recommendations for key activities and tasks and associated timelines for both the contractor and each entity to execute the deployment of the new solutions to the entity. The plan shall include the following elements:

a. All Key Phase 2 Task and Subtask activities.
b. Recommended resource requirements for both the contractor and the relevant entity.
c. Migration Plan and Schedule aligned with the IMS.

2.5.3 TASK 3 - ESTABLISH AND MANAGE A PRE-MIGRATION HOSTING ENVIRONMENT

The contractor shall install, configure, and operate the necessary hardware, software, and any other items to establish the hosting environments and services required to perform hosting-related services in a contractor-provided facility to support the five entities. This includes purchasing and installing applicable application software licenses from third parties and managing the hosting environments during implementation and migration periods.

2.5.3.1 SUBTASK 1 – ESTABLISH AND OPERATE FACILITIES, HARDWARE, INFRASTRUCTURE, AND SOFTWARE

The contractor shall establish and operate the facilities, hardware, infrastructure, and software necessary to host and support the systems. The contractor shall maintain these environments, administering appropriate patches and upgrades to ensure high-performance service delivery to the Government consistent with industry standards and best practices.

The contractor shall provide a Hosting Setup Plan that includes the following elements:

a. Processes to define and report performance measures, metrics, and status updates on the facilities, hardware, infrastructure, and software supporting the systems to be used to track progress during a program.
b. Processes to perform configuration management activities, including identifying, recording, and reporting on infrastructure components (hardware, software, and associated documentation).
c. Processes to determine performance of the applications in the development, testing, training, and any other environments except for planned maintenance periods.
d. Processes to record events that occur during the backup process.
e. Processes to perform maintenance updates including, infrastructure releases, and hardware upgrades.

The contractor shall provide a Hosting Setup Report, which shall include the architecture, hardware information, software installed and purpose, operating system (OS) security controls, and the application/database security controls implemented.

The contractor shall provide a Performance Report that includes capacity, performance, availability, problem trends, and hardware, software, and facilities status.

2.5.3.2 SUBTASK 2 – INSTALL AND CONFIGURE APPLICATION / SYSTEM

The contractor shall install and technically configure systems into the hosting and infrastructure environment, preparing it for use by the Government during all phases of a project.

2.5.3.3 SUBTASK 3 – MANAGE HOSTING CONFIGURATIONS

The contractor shall perform configuration management activities, including identifying, recording, and reporting on infrastructure components (hardware, software, and associated documentation) associated with each software configuration.

2.5.3.4 SUBTASK 4 – MAINTAIN HOSTING ENVIRONMENT AVAILABILITY

The contractor shall ensure ongoing availability of any systems/applications in the hosted development, testing, and training environments, and any other environment except for planned maintenance periods. The contractor shall provide standard maintenance periods for applying infrastructure releases, including hardware upgrades.

2.5.3.5 SUBTASK 5 – PERFORM SOFTWARE AND DATA BACKUPS

The contractor shall conduct system backups to ensure that data and transactions would not be lost during an event.

2.5.3.6 SUBTASK 6 – SUPPORT PENETRATION TESTING

The contractor shall allow the Government to perform penetration testing of the systems in the hosted environment throughout the TO's POP and provide any access necessary to Government personnel or other third-party personnel as authorized by the Government.

2.5.3.7 SUBTASK 7 – IMPLEMENT INITIAL HELP DESK SERVICES

At an appropriate time during a system implementation or migration project, the contractor shall establish help desk services and publish processes to relevant project participants to facilitate the resolution of technical issues that could be encountered during business configuration, training, testing, and any other activity requiring system access by the Government end-users.

2.5.3.8 SUBTASK 8 – MAINTAIN SYSTEM DOCUMENTATION

The contractor shall develop and update documentation on system technical environments for all instances within two weeks of a change. The contractor shall make this System Documentation Technical Manual documentation available and easily accessible to the Government in an electronic format.

The contractor shall provide a technical manual that contains documentation on the system environments.

2.5.4 TASK 4 – PRE-MIGRATION PREPARATION OF SYSTEMS

The contractor shall perform business analysis, requirements analysis, fit/gap analysis and requirements validation, business process realignment, software package design and

configuration, required interfaces and extensions development, and solutions testing in preparation for migration and rollout. This includes performing any other related technical or integration work.

2.5.4.1 SUBTASK 1 – CONDUCT BUSINESS PROCESS REALIGNMENT (BPR)

The contractor shall conduct an analysis of the Government user functions and processes and work with the Government to identify any potential changes to current business processes and activities that are driven by how the new solutions operate. The contractor shall update the BPR Plan and Schedule as needed during this subtask. The contractor shall work with appropriate Government subject matter experts and/or owners of business processes to discuss how the system operates and provide the necessary system documentation, including business Functional Process Documentation that depicts how the new system performs each function. This will ensure the Government has a basis for updating its processes and assigning roles and responsibilities. The contractor shall produce a BPR Report that summarizes all of the areas within an entity that needs to update its processes, procedures, and other documentation to align to how the new system operates.

2.5.4.2 SUBTASK 2 – PREPARE DATA CLEANUP, DATA CONVERSION, AND DATA MIGRATION PLANS

The contractor shall prepare and deliver a detailed Data Migration plan that addresses its approach for data cleanup, data conversion, and data migration for each entity migrating to a new system, as the contractor shall be responsible for the final conversion and data migration that meets entity requirements. The plan shall include how the contractor will identify and establish all appropriate system setup and configuration tables in preparation for data conversion and migration.

Data from the current systems that is needed to set up and initially populate the systems shall be converted; however, historical transactional data shall not be converted.

The Data Conversion Plan shall include the overall approach, assumptions, tools, and processes that shall be used in the data conversion. It shall include an inventory and cross-reference of source and target data elements, schema, metadata, and all self-describing files; process for data extraction, transformation, and loading for each data source; tools needed to execute the conversion; and strategy for data quality assurance and control.

The Data Conversion and Migration Report shall include analysis and tracking of data conversion and migration results at summary and detailed levels.

2.5.4.3 SUBTASK 3 – FINALIZE THE GOVERNMENT MIGRATION/DEPLOYMENT PLAN

The contractor shall finalize the detailed Migration/Deployment Plan to rollout the new systems to each entity and its end users. This plan shall communicate how and when the system and contractor supporting processes (such as the contractor help desk, incident management, and change management functions), where applicable, shall be deployed, installed, and/or transitioned into operation. The purpose of this plan is to ensure all stakeholders are aware of the details, requirements, and responsibilities involved in successfully completing this project and migrating the product to the Government's end-users.

The Migration Plan shall provide detailed recommendations for all work steps to execute the deployment of a new system to the entity. At a minimum, the plan shall include the following elements:

a. Pre-deployment preparation period activities.
b. Resource requirements for both the contractor and the relevant entity.
c. Deployment timeline for the deployment cutover days.
d. Communication plans for deployment cutover days and post-cutover.
e. Escalation procedures for deployment cutover days.
f. System documentation for all resources involved.
g. Post-deployment review processes.
h. Processes to capture, record, and implement lessons learned.

The detailed migration and deployment/cutover schedule shall include a timeline of the activities to migrate an entity from the current system to the new system. Details on the data clean up approach, data conversion approach, new environment setup, and migration of configurations shall be included.

The Post-Deployment Review Report shall contain assessment information on each deployment including:

a. Summary assessment of deployment activities.
b. Evaluation of the effectiveness of the deployment.
c. Government feedback.

The Lessons Learned Report shall include lessons learned recorded from each deployment and recommendations for future deployments.

2.5.4.4 SUBTASK 4 – DESIGN THE SOLUTION

The contractor shall prepare a design for the new system, enhancements, and related system components that are in scope for a project. The design shall include a detailed description of the solution approach to meeting entity requirements. The design shall address technical and business configuration design, where applicable, of COTS products, interfaces, extracts, extensions, and data conversions.

During the design of ongoing interfaces and data extracts, the contractor shall work with each entity to determine existing applications and strategize on the architectural design of the new interfaces and extracts to ensure compatibility with systems being interfaced. The contractor shall attend technical working group meetings and conference calls as needed with system owners to design interfaces to meet requirements.

For designing any configuration aspects and reports, the contractor may be required to work with appropriate Government-designated subject matter experts to gather the information necessary to prepare the design.

For designing data conversion routines, the Government will make a team of subject matter experts available to the contractor to explain existing data schemas.

The contractor shall design extensions needed to provide functionality required by the Government that are not supported by the COTS software product. For example, during the fit/gap analysis or through other mechanisms if it is determined that the system cannot be configured to meet certain entity specific mandatory requirements, the contractor shall scope and design, and later develop, extensions to the COTS product to accommodate the entity-specific mandatory functionality. These extensions shall reside outside of the COTS product and shall not interfere with the on-going COTS upgrades.

For designing/defining the business rules/configuration rules, the contractor shall work with the Government to determine and document all required rule-allowed values in preparation for future configuration activities.

Upon completion of each design, the contractor shall conduct a design review with each entity. The design review shall indicate the completeness of the designs and how they meet specified requirements.

The contractor shall prepare and deliver a System Design Document (SDD) which details system specifications where applicable, based on the scope of a project. The SDD shall include the following:

a. System architecture, to include at a minimum, data flow and system interconnection diagrams.
b. File and database design.
c. User interface designs.
d. Interface designs and interface control document.
e. Report designs.
f. Any other technical design components.
g. Design completion checklist.

The Interface Control Documents shall include the following elements:

a. Data elements required in the interface and/or extract.
b. Detailed interface requirements.
c. Interface processing time requirements.
d. Definition of the message structure and protocols that govern the interchange of data.
e. The communication paths along which the data are expected to flow.
f. The frequency and timing of the interface or extract.
g. Interdependencies with other automated processes for the system.
h. All other data necessary to manage and control the interface.

The contractor shall create a Requirements Traceability Matrix (RTM) to map each functional requirement to the application sections of the design and maintain the RTM throughout all phases of the project to ensure traceability all the way through testing.

The contractor shall participate in Design Review Sessions to determine completeness of the designs and how well the designed solution meets the specified requirements.

As a part of Design Review, the contractor shall include the following (where applicable based on the scope of the project):

a. The Product Architecture Document: Detailed and easily accessible in order to present the project to any stakeholders or developers in a way that they can easily understand the architecture of the project.
b. The Functional Flow Document: Detailed step-by-step diagram of the system's functional flow.
c. The Hardware Architecture Document: Detail of the software and server configurations of the system.
d. The Topological Architecture Diagram: A schematic that diagrams the connections among nodes in the telecommunications network and any other network-related components of the system and its overall environment.
e. The Node Connectivity Diagram: Detail of the connections between business locations (nodes) as well as the information being exchanged.

The contractor shall maintain a Version Description Document that contains a summary of the features and contents of the software for each environment in which it is configured (test, training, pre-production, production, etc.). It must be used to track and control different versions of software to be released to each of the operational environments.

The contractor shall deliver Configuration Files with detailed system configuration and parameters. The contractor shall also deliver a System Architecture Document that provides a comprehensive architectural overview of the system, system components, and the relationships between them to assist the entity in understanding and documenting interrelationships between the contractor solution and other internal and external systems.

2.5.4.5 SUBTASK 5 – MANAGE SYSTEM CONFIGURATION CHANGES

At a point in time during the pre-migration preparation of systems, the contractor shall lock down the applicable system software and manage all changes to it in a controlled manner. When this occurs, the contractor shall follow a formal process, as defined in a System Change Control Plan, to introduce on-going system configuration and in-scope changes to the system. This includes understanding Government priorities and controlling how changes are introduced into the system(s) in a coordinated manner.

2.5.4.5.1 SYSTEM CONFIGURATION

The contractor shall manage the necessary COTS configuration changes, such as updating pay plans to allow for modifications from OPM that occur during the program. For configuration changes, the contractor shall develop a process that defines who approves the change and who implements the change (contractor or Government). Decisions must be made on whether extensive change control process, which may require approvals and testing, shall be followed, or whether abbreviated processes can be adopted for some changes.

The contractor shall prepare and deliver a Configuration Management Plan that includes configuration management responsibilities of the entity and includes the processes for how the entity will maintain and verify the completeness and correctness of configuration items throughout the project lifecycle.

The contractor shall prepare and deliver a Security Configuration Checklist, which contains verification that the system has been configured properly, and adheres to the required security standards.

2.5.4.5.2 CHANGE CONTROL MANAGEMENT

The contractor shall develop a System Configuration and Change Control Governance Plan that defines, during a migration, the contractor's governance approach and structure (as a Shared Services Provider), identifies stakeholders, and defines roles and responsibilities of the contractor and entities governing the five new environments and the specific processes that align to the approach.

The contractor shall develop change control processes and procedures that define how it shall manage in-scope change requests during an implementation/migration project. In-scope change requests include defect fixes, in-scope changes resulting from fit/gap analysis, testing or training activities, and approved and funded external requests that cannot be deferred until after cutover. The change control process and procedures include:

a. How users/organizations request changes.
b. How the governing bodies review, approve, and prioritize changes.
c. How change control activities are coordinated with software configuration management activities.
d. How change control activities are communicated to stakeholders.
e. How tested and released.

2.5.4.6 SUBTASK 6 – CONFIGURE BUSINESS RULES IN THE SYSTEM

The contractor shall complete the configurations necessary to incorporate the Government's business rules, workflows, best practices, and standard procedures as defined in the requirements.

2.5.4.7 SUBTASK 7 – DEVELOP REPORTS

The contractor shall develop custom reports as defined by the Government. Reports include queries, charts, graphs, and dashboards.

2.5.4.8 SUBTASK 8 – DEVELOP DATA CONVERSION PROGRAMS

The contractor shall develop the data conversion routines necessary to transform and convert Government data into the new database schemas as defined in the new system.

2.5.4.9 SUBTASK 9 – DEVELOP INTERFACES AND EXTRACTS

The contractor shall develop interfaces and extracts as defined by the Government in order to facilitate integration with other systems. The other systems could include ones already hosted by the contractor, hosted by the Government, or hosted by a third party. The contractor shall develop the interfaces according to agreed-upon design specifications.

2.5.4.10 SUBTASK 10 – DEVELOP EXTENSIONS

The contractor shall develop approved extensions necessary to accommodate functionality required by the Government that is not supported by the COTS software product. These extensions shall reside outside of the COTS product and shall not interfere with or significantly increase the level of effort to upgrade the COTS software as needed to support new releases and patches.

2.5.4.11 SUBTASK 11 – TEST THE SYSTEM

There are various activities to support that the new system meets the Government's functional and technical requirements and processes and calculates data in the same manner as the Government's relevant current system (if applicable) or as defined by test cases. Testing shall ensure all components of the systems are working properly.

2.5.4.11.1 PREPARE A TEST PLAN

The contractor shall prepare a comprehensive test plan that includes the testing of both technical and business configurations, extensions, interfaces, data conversion routines, reports, and any and all other testable components. The test plan shall encompass, when applicable for the project, the following testing types:

a. Unit testing
b. System testing
c. Integration testing
d. Interface testing with internal and external entities/environments
e. Regression testing (End to end testing)
f. User acceptance testing

The test plan shall incorporate the broader view of how testing shall occur, the tools being used to manage test scenarios, test cases, test scripts, and test results. The Test Plan shall also describe how defects shall be tracked and reported and the process for integrating defect repair with configuration and release management processes and plans. The test plan shall also account for how test cases shall be traced back to the RTM.

2.5.4.11.2 DEVELOP TEST SCENARIOS, TEST SCRIPTS, AND TEST CASES

The contractor shall create test scenarios, test scripts, test cases, and obtain Government input and approval on the initial draft test scenarios and scripts as well as the final completed test scenarios and scripts. Test scripts shall include each element to be tested with mapping to the Government requirements, as well as a pass/fail indication. The contractor shall maintain a separate, fully configured test system to which specified Government personnel would have access.

The testing phase incorporates one or more test readiness checkpoints. Test readiness assesses the completeness of the configured software, developed interfaces and extensions, and testing materials. The contractor shall conduct a test readiness review after development and test preparation is complete. The test readiness review shall occur at an agreed upon number of days prior to the commencement of text execution. The contractor shall collaborate with the

Government to identify critical areas to develop go/no-go decision criteria and complete a Test Readiness Go/No-Go Form.

2.5.4.11.3 EXECUTE TESTING

The contractor shall execute tests according to the agreed upon test plan, including testing of both technical and business configurations, extensions, interfaces, data conversion routines, reports and any and all other testable components within the scope of the project. The contractor shall execute testing, using a suite of automated test tools and track defects in an automated tool. Testing shall encompass, when applicable, the following testing types, be conducted in corresponding test environments established to control testing, and allow the promotion from one environment to the next upon successfully exiting the previous testing stage:

a. Unit testing
b. System testing
c. Integration testing
d. Interface testing with internal and external entities/environments
e. Regression testing (end to end testing)
f. User acceptance testing
g. Parallel testing (when applicable)

The contractor shall prepare and deliver a Test Report detailing information on the testing processes including the test execution and results and plans for addressing defects.

2.5.4.11.4 ESTABLISH A REQUIREMENTS AND TESTING REPOSITORY

The contractor shall establish and maintain an automated repository(s) of requirements, test scenarios, test cases, test scripts, and other relevant information, using requirements initially provided by the Government and updated over the course of a project, to enable:

a. Traceability of requirements to test scenarios, test cases, and test scripts along with the origin of requirements.
b. Tracking defects identified during testing and their ultimate resolution.
c. Leveraging of previous test scenarios and test cases during future testing cycles involving the system.

2.5.4.11.5 CONDUCT OPERATIONAL READINESS DUE DILIGENCE

Operational Readiness services describe the parameters that govern how a new system shall be configured and deployed to operations, as well as how the contractor shall manage ongoing services. It also includes defining the process and stakeholders that will sign off on the operational readiness.

The contractor shall create an Operational Readiness Checklist or utilize a checklist provided by an entity to manage the status of readiness activities and report to stakeholders on the status of readiness and activities required to achieve readiness.

The contractor shall provide an Operational Readiness Technical Manual that contains detailed instructions for the operation, installation, maintenance, and general use of the system. The Technical Manual shall clearly describe the system that shall be operating in the production

environment and provide the operations and support staff (both contractor and entity staff as required) with the information necessary to effectively handle routine production processing, ongoing maintenance, and identified problems, issues, and/or change requests.

The contractor shall provide a Systems Management Guide that contains information on the interactions between the components that are part of the system's architecture.

The contractor shall provide an Incident Response Plan that describes the organized approach to addressing and managing the aftermath of a security breach, attack, or an incident in a manner limits damage and reduces recovery time and costs.

2.5.4.12 SUBTASK 12 – PREPARE A DEPLOYMENT AND CUTOVER ACCEPTANCE PLAN

The contractor shall develop a Deployment and Cutover Acceptance Plan that identifies the criteria the new systems and operational environment must meet prior to full deployment and the processes that describe how acceptance shall be obtained. At a minimum, the criteria shall indicate the system is functioning as designed and meets the specified requirements, users are trained, production environments are in place, and managed service solution processes and procedures are established and in place. The plan shall also identify the stakeholders from each entity that will be required to sign-off that all criteria have been met, prior to the actual deployment (go/no decision).

The Deployment and Cutover Acceptance Plan shall contain a Deployment and Cutover Acceptance checklist that identifies the criteria that the entity organization and new operational environment must meet prior to full migration and cutover. At a minimum, these criteria shall indicate the following:

a. System is functioning as designed and meets the specified requirements.
b. End users have received training.
c. Production environments are in place.
d. Managed service processes and procedures are established and in place.
e. Contractor help desk is operational and staffed to support the cutover and ongoing operations.
f. The Operational Readiness Checklist items are completed or mitigation approaches are agreed upon by the contractor and entity.

The Deployment and Cutover Acceptance Checklist will be used prior to deployment to assist in making a go/no go decision.

2.5.4.13 SUBTASK 13 – PREPARE A CONTINUITY OF OPERATIONS AND CONTINGENCY PLAN (COOP)

The contractor shall prepare the initial Continuity of Operations and Contingency Plan (COOP) that complies with guidance contained in Federal Preparedness Circular 65 (FPC-65) and any subsequent updates for providing continuity of operations in the event of an emergency or disaster. The plan shall describe how the contractor would recover a system and have it operational within 12 hours of COOP activation.

The contractor shall prepare the COOP as required by Appendix III to OMB Circular A- 130, NIST 800-53 Revision 4, and NIST 800-34, and any subsequent updates to any of the above. At a minimum, the plan shall include testing and training for the contingency and backup operations, alternate storage and processing sites, and alternate telecommunication services. The contractor shall designate a site that meets all requirements for an alternate storage and operations site. The contractor shall plan for performing disaster recovery exercises, describing the scope and results of the recovery exercise, and note and resolve any deficiencies.

2.5.5 TASK 5 – PREPARE AND DELIVER TRAINING

The contractor shall provide the preparation and delivery of training through a variety of training mechanisms.

2.5.5.1 SUBTASK 1 – PREPARE A TRAINING PLAN

The contractor shall prepare a Training Plan that defines the approach to systems training for Government system administrators and end users, tailored to the specific roles identified for using the system. This Training Plan may include one or more of the following training methods as well as other methods the contractor deems appropriate for the functionality being rolled out to the users:

a. Train the Trainer: The contractor shall provide training to develop Government trainers who will conduct training to the end users.
b. Self Service: The contractor shall provide web-based training that users can access to training materials that shall teach them the system based on the role they have in the system.
c. Virtual Instructor-Led Training: The contractor shall provide instructor-led training that allows users to participate virtually.
d. In-Person, Instructor-Led Training: The contractor shall provide instructor-led training that allows users to participate in person.

The Training Plan shall include a detailed Training Schedule of when materials shall be prepared to support training, the training methods, and the specific training dates.

2.5.5.2 SUBTASK 2 – PREPARE TRAINING MATERIALS

The contractor shall prepare training materials to support the Training Plan as agreed upon with the Government. All training materials must be 508 Compliant. Materials shall include, but are not limited to:

a. Training manuals (electronic) available for download for participants and trainers.
b. Interactive system demonstrations.
c. An online set of frequently asked questions (FAQs).
d. Training material to be placed on a Government-specific training system.
e. User Guides for quick look up by an end-user.
f. Standard Operating Procedures (SOP) for system administrators.
g. Materials to support a Knowledge Management repository residing inside or outside of the system being rolled out.

2.5.5.3 SUBTASK 3 – TRAIN END-USERS

The contractor shall train designated end-users and/or entity trainers to use software in the manner in which it has been configured for the Government. The method and schedule of training shall be established with the Government and if applicable, reflected in the Training Plan.

2.5.5.4 SUBTASK 4 - REGISTER AND TRACK USER TRAINING REGISTRATION

The contractor shall provide a mechanism to track training participants and sessions and identify participants who have not yet attended the required training. If the entity has a training registration capability, the contractor may use that capability, upon agreement with the entity, to satisfy this requirement.

Training Evaluations shall be developed for completion by class participants to assess whether or not training objectives were met and users feel ready to use the new system.

2.5.6 TASK 6 – MIGRATE, SUPPORT, AND STABILIZE SYSTEMS

The contractor shall provide the final implementation of new systems, functionality, interfaces, integrations, and any other technical components. This includes the conversion of data and rollout of new systems and functionality to end-users. During this phase, until the last entity has been migrated to a new system and accepted by the Government, the new system shall be closely monitored and stabilized.

2.5.6.1 SUBTASK 1 – CLEAN UP, CONVERT, AND MIGRATE DATA TO NEW ENVIRONMENT

The contractor shall convert and migrate data and software to the designated operational environment and test to ensure the successful data migration as required by the Government. The contractor shall support Government data cleanup activities by providing reports to any entity involved in data conversion, highlighting data that requires cleanup or population prior to conversion to a new system. The contractor shall work directly with any entity involved in a data conversion.

2.5.6.2 SUBTASK 2 – CUTOVER TO THE NEW SYSTEM

The contractor shall cutover to the new system per the schedule, checklists, and processes defined in the relevant Migration Plan. Cutover is the process of transitioning from one system to a new system. It specifically refers to switching from an old (hardware and/or software) system to a replacement system. The contractor shall deploy the new system to the Government's end-users.

As a part of this process, the contractor shall prepare and provide a Closeout Plan, a Transition Meeting, System Documentation, and a Closeout Report.

a. The Closeout Plan shall provide summary level and detailed information including recommendations to transition from rollout and stabilization to the Ongoing Managed Service Support Task. The plan shall also include a closeout checklist, program assessment, resource reassignment, and lessons learned.

b. The contractor shall schedule a Transition meeting to review the Closeout Plan checklist, and required closeout documentation.
c. The contractor shall provide all documentation necessary to effectively operate and maintain the system.
d. The Closeout Report shall include a summary of key deliverables, program assessment, status of regulatory closeout items, lessons learned, and recommendations for best practices.

2.5.6.3 SUBTASK 3 – STABILIZE THE SYSTEM

The primary goal of stabilization is to improve solution quality and ensure system acceptance. The contractor shall provide the entity with the documentation required to verify the ATO status of the contractor's solution. During stabilization, the contractor shall perform activities and create deliverables that transition the new system from a newly deployed solution to a stable, smoothly running system. During the stabilization period, the contractor shall ensure that support levels are high enough to respond to questions and resolve reported incidents that spike after deployment.

During the early stages of stabilization, it is common for users to report incidents at a rate faster than during later stages. Incidents will slow as users become more familiar with the system, and the contractor resolves system incidents and improves training materials and communication to address future questions.

The contractor shall prepare and provide a Stabilization Plan, a Stabilization Report, and a Performance Report.

a. The Stabilization Plan shall include recommendations for maintaining and improving system stability in addition to identifying and addressing any technical and/or functional issues that occur after deployment. The plan shall include the process and resources required to address issues encountered by end-users.
b. The Stabilization Report shall include any technical or functional issues reported or identified after deployment in addition to recommendations to address the issues.
c. The Performance Report shall include detailed information on how well system performance met each of the service level agreements or performance plans/metrics established.

2.5.6.4 SUBTASK 4 – PROVIDE POST-MIGRATION CUSTOMER SUPPORT

During this subtask, the contractor shall provide onsite, hands-on support to migrated entities and their employees in office locations identified by the Government. Contractor staff shall be available for end users to ask questions on system functionality, assist in resolving system access issues, and where necessary, direct issues to the contractor help desk support teams to formally register system issues and/or incidents. During this period, issues may be uncovered that shall require business rule, system configuration, or other changes. In this case, the contractor shall leverage its configuration change management processes to expedite necessary approvals for changes. The contractor shall prepare weekly Post-Migration Support Reports on support provided, and coordinate reporting across the five environments to facilitate the remediation of common system errors encountered and develop common messaging to alert entity end-users of issues and resolution times.

The contractor shall conduct weekly meetings with key entity stakeholders and management to update them on its observations during the period and make recommendations on actions each entity can take to improve system adoption and reduce the amount of ongoing support required.

At the end of the each month, the contractor shall provide a Findings and Recommendations Report on recommendations implemented, results of the actions, and new actions the entity can take to improve system adoption and reduce the amount of ongoing support required.

All reporting shall include issues, questions, and the associated metrics captured via the contractor help desks.

2.5.7 TASK 7 – PROVIDE MANAGED SERVICE SUPPORT

The contractor shall provide ongoing support of systems including providing application software to the Government's end-users, maintaining the hardware and software hosting environment, providing and testing a disaster recovery site/environment, providing help desk software and services, and performing application maintenance and security upgrades. As a Shared Services Center, the contractor shall continually review the CHCO Council future visions and goals and determine how its solutions can be updated over time to meet those goals. managed service support shall commence when the Government formally accepts the migration.

2.5.7.1 SUBTASK 1 – CONDUCT POST-MIGRATION CHANGE CONTROL, RELEASE MANAGEMENT, AND SYSTEM CONFIGURATION GOVERNANCE (POST-MIGRATION)

Post-migration changes to the system can result from software incidents, routine configuration changes, patches, upgrades, regulatory, legislative and audit changes, and approved and funded requests for enhanced functionality not originally within the scope of the program. Post-migration Change Control and Governance is the formal process used to ensure that these changes are introduced in a controlled and coordinated manner. Change Control and Governance contains the following three components: Change Control Governance, Release Management, and System Configuration.

2.5.7.1.1 POST-MIGRATION CHANGE CONTROL GOVERNANCE

The contractor shall develop a Change Control Governance Plan that defines the contractor's post-migration, ongoing governance approach and structure (as a Shared Services Center), identifies stakeholders, and defines roles and responsibilities of the contractor and entities owning the five new environments and the specific processes that align to the approach.

Processes shall also be developed to facilitate change due to contractor's requirements to implement new system hardware, software, and firmware and other hosting infrastructure components.

Within the Change Control Governance Plan, the Government will be the single organization that governs all change requests, patches, COTS product and other software releases, and COTS product and other software upgrades to their specific environment of the applicable system. Additionally, the Government, in collaboration with the contractor, must be able to request changes to the COTS products and participate with the COTS product vendors in establishing priorities for future enhancements to the base COTS product.

The contractor shall develop Change Control Process and Procedures that define how it shall manage ongoing change requests. The Change Control Process and Procedures shall include:

a. How users/organizations request changes.
b. How the governing bodies review, prioritize, and approve changes.
c. How change control activities are coordinated with software configuration management activities.
d. How change control activities are communicated to stakeholders.
e. How changes are approved, tested, and prioritized for release.

The Configuration Management Plan shall describe the configuration management activities, including identifying, recording, and reporting on infrastructure components (hardware, software, and associated documentation) for the various system configurations during the Ongoing Managed Service Support Task.

Prior to each release for a specific entity, the contractor shall provide and deliver Release Notes, an Installation Guide, and a User Guide to each impacted entity. The Release Guide shall provide detailed information on the corrections, changes, or enhancements made to the system.

The Installation Guide shall contain detailed information on advanced uses of the new release and specific system configurations that shall be required of an entity to enable the new functionality.

The User Guide shall contain detailed functional system information that describes the functionality of the system from a user's perspective. This guide shall be comprehensive enough to be used as the basis for training materials, help desk materials, and system-based help content.

Following each release, the contractor shall provide a Data Dictionary. The Data Dictionary shall contain detailed descriptions of data objects to assist entities in determining future reporting, extract, and interface requirements.

2.5.7.1.2 RELEASE MANAGEMENT

The contractor shall deliver formal Release Management and Configuration Management Plans for the system(s) hardware and software components. The Release Management Plan shall support the Change Control Process and define how the contractor shall manage and deploy software releases containing prioritized fixes, enhancements, and upgrades post-migration.

The Configuration Management Plan shall support the change control process and include the contractor's defined approach for configuration management. The approach shall establish and maintain baseline configurations on hardware, software, and documentation for the system(s).

As part of the configuration management process, the contractor shall establish and maintain the environments required to support simultaneous development, testing, training, and production environments of the five separate entities. At a minimum, the Government requires the following environments to support the initial release, as well as future migrations and new software releases or upgrades. In addition, Government personnel may use one of the environments to test complex transactions prior to executing them in production.

a. Development
b. System Testing

c. Integration/User Acceptance Testing
d. Training
e. Production Simulation
f. Production

2.5.7.1.3 SYSTEM CONFIGURATION

The contractor shall manage the necessary configuration updates due to regulatory, legislative, audit, or other changes. For configuration changes, the contractor shall develop a process that defines who implements the change (contractor or Government) and whether it needs to follow the more extensive change control process, which may require approvals and testing, or whether it can follow an abbreviated process.

2.5.7.2 SUBTASK 2 – PROVIDE PRODUCTION HOSTING SERVICES

The contractor shall maintain the hosting environments, administering appropriate patches and upgrades to ensure high-performance service delivery to the entity consistent with industry standards. To perform hosting services, the contractor shall perform the following activities:

2.5.7.2.1 MANAGE CONFIGURATION

The contractor shall follow the Configuration Management Plan to perform configuration management activities, including identifying, recording, and reporting on infrastructure components (facilities, hardware, software, and associated documentation) for the various system configurations.

2.5.7.2.2 PROVIDE MANAGED SERVICES FOR FACILITIES, HARDWARE, INFRASTRUCTURE, AND SOFTWARE

The contractor shall operate the facilities, hardware, infrastructure, and software necessary to support its solutions. The contractor shall perform ongoing maintenance and upgrades of the environment components to ensure obsolescence is never reached, capacity is sufficient, and vulnerabilities are closed. The contractor shall work with third parties to ensure software and firmware patches and fixes are received and then applied in a timely manner to correct defects and/or prevent future issues and vulnerabilities.

The contractor shall prepare an Ongoing Managed Service Support Plan. The plan shall provide detail on how the following will be accomplished:

a. Performance of general application operations, ongoing fixes, patches, upgrades, and enhancements including regulatory, legislative, union, and other mandatory enhancements.
b. Performance of routine preventive and regular maintenance on the components of the information system.
c. Establishment and maintenance of Government-specific configurations and data.

The contractor shall provide a Responsibility Matrix that identifies the responsibilities and the individuals assigned to those responsibilities. The contractor shall identify both contractor and Government personnel where applicable.

The contractor shall provide a Production Operations Manual that contains detailed descriptions of the system's operations and defines the requirements and procedures for effective operation of the system.

The contractor shall provide a Routine Maintenance schedule that includes the schedule of planned maintenance sessions.

The contractor shall provide a Process Review Report that includes the health of the system. It shall also include a formalized summary of performance reports.

The contractor shall provide an Issues Tracking Log that contains all issues and their validity. The log shall be thorough and contain the status and resolution date of the issue.

The contractor shall provide a User Satisfaction Review that includes a current user satisfaction with the performance capabilities of the system.

The contractor shall provide a System Performance Report that includes capacity, performance, availability, problem trends, and hardware status and performance metrics as defined in service level agreements and performance measure agreements.

2.5.7.2.3 MANAGE CAPACITY

The contractor shall perform capacity management activities, including planning, analyzing, sizing, and optimizing capacity to enable the production environment can handle current and projected future data processing demand.

2.5.7.2.4 MAINTAIN AVAILABILITY

The contractor shall ensure ongoing availability of the system except for planned and agreed upon maintenance windows as defined in performance measures. The contractor shall provide standard maintenance windows for applying infrastructure releases, including hardware upgrades, with no disruption to the Government during the established business hours. With adequate notice, the contractor shall work with the Government to schedule an outage outside of the maintenance windows.

2.5.7.2.5 PERFORM ONGOING SOFTWARE AND DATA BACK-UPS

The contractor shall conduct backups to ensure that no data is lost. The contractor shall develop and publish a backup and offsite storage plan that does not affect system processing and is incorporated and tested as part of the disaster recovery testing cycle.

2.5.7.2.6 SUPPORT PENETRATION TESTING

The contractor shall allow the Government to perform penetration testing of the systems in the hosted environment and provide any access necessary to Government personnel or other third-party personnel as authorized by the FEDSIM COR to perform penetration testing.

2.5.7.2.7 MAINTAIN SYSTEM DOCUMENTATION

The contractor shall develop and update documentation on systems' technical environments for all environments within two weeks of a change. The contractor shall make this documentation available and easily accessible to the Government in an electronic format.

The contractor shall provide a Technical Manual that contains documentation on the technical environment. The Manual shall be updated as changes occur to the technical environment.

2.5.7.3 SUBTASK 3 – UPGRADE THE SYSTEM

The contractor shall upgrade the system with software updates and/or new releases provided by COTS software providers, collaborating with the Government to determine the priority and scheduling of the work, taking into consideration, the timing of other changes to the system as driven by the entity. The contractor shall work with COTS software providers to understand the features and functions available in new releases or updates so that effective planning and analysis can be done with the Government.

2.5.7.4 SUBTASK 4 – PERFORM APPLICATION AND INFRASTRUCTURE MAINTENANCE

The contractor shall perform routine preventive and regular maintenance on the components of the system in accordance with manufacturer or contractor specifications and/or organizational requirements. The contractor shall establish, populate and maintain Government-specific configurations and data. The contractor must have effective controls on the tools, techniques, mechanisms, and personnel used to conduct system maintenance. All vulnerability prevention and patching shall be kept current. The contractor shall report any vulnerability or patch that is not resolved or will not be resolved within approved time limits immediately to the Government PM for disposition. The contractor shall implement regulatory, legislative, and Government-mandated changes to the systems, work with stakeholders to determine the appropriate configurations needed to implement the change, and determine the release schedule for implementing the change.

The contractor shall develop routine maintenance schedules for approval by the FEDSIM COR or by a designate. Routine maintenance shall be conducted during off hours. If significant maintenance or an improvement is to be performed, then these events shall occur during off hours as negotiated with the Government for each event.

2.5.7.5 SUBTASK 5 – MAINTAIN AND EXECUTE CONTINUITY OF OPERATIONS PLANNING (COOP)

The contractor shall maintain and provide upon request the COOP developed during the migration preparation phase. The COOP must continue to comply with guidance contained in Federal Preparedness Circular 65 (FPC-65) and any subsequent updates for providing continuity of operations in the event of an emergency or disaster. The contractor shall have the system operational for the Government's use within 12 hours of COOP activation.

The contractor shall be required to perform an annual test of the contractor's disaster recovery plan. That test shall meet Federal standards. The Government reserves the right to observe and participate in the contractor's disaster recovery testing process.

The contractor shall have a contingency plan as required by Appendix III to OMB Circular A-130, NIST 800-53 Revision 4, and NIST 800-34 and any subsequent updates. At a minimum, the plan shall include testing and training for the contingency and backup operations, alternate storage and processing sites, and alternate telecommunication services. The contractor shall designate a site meeting all requirements for an alternate storage and operations site. The

contractor shall perform disaster recovery exercises, describe the scope and results of the recovery exercise, and note and resolve any deficiencies.

In addition, the contractor shall perform regularly scheduled backup and recovery procedures and produce a log of events that occur during the backup and recovery process. The contractor shall produce a report that provides a remediation status of any issues (both short-term and long-term) to indicate how the contractor will prevent the issue in the future.

The contractor shall provide a Contingency Plan that includes testing and training for the contingency and backup operations, and alternate storage and processing sites. The contractor shall designate a site meeting all requirements for an alternate storage and operations site. The contractor shall perform disaster recovery exercises, describe the scope and results of the recovery exercise, and note and resolve any deficiencies.

The contractor shall perform Annual Disaster Recovery Tests to indicate its ability to recover the application and data in the event of a significant outage or disaster.

The contractor shall provide a Disaster Recovery Test Results Report including plans for addressing issues uncovered during the test.

2.5.7.6 SUBTASK 6 – MANAGE, REPORT, AND RESOLVE INCIDENTS

The contractor shall develop an Incident Management Plan in order to establish the processes and procedures for reporting and resolving system incidents. The contractor shall bring emergency maintenance incidents or system outages during normal business hours of operations to the attention of the FEDSIM COR and TPOC as quickly as possible. End-user notification shall be the responsibility of the contractor. Response time is the time that a contractor responds via email or phone to a technical support ticket being opened. The response may include notification of a resolution, a request for more information, or any other communication aimed at resolving the incident. The contractor shall maintain an Incident Tracking Log documenting incidents and their resolution.

2.5.7.7 SUBTASK 7 – PROVIDE HELP DESK SERVICES

The contractor shall establish and maintain help desk functionality for each system, including providing a system that the contractor uses to capture, monitor, and report Government inquiries and resolution status. The help desk must operate during hours prescribed and agreed upon in Performance Measures for the system. Response time to answer calls and respond to other inquiry mechanisms (such as email or direct end-user entry into contractor's help desk system) shall also be established in the Performance Measures defined for the system.

If required, the contractor shall develop an interface with the Government's help desk systems so that open tickets can be viewed by the Government's internal help desk personnel in a consolidated fashion with business help desk tickets.

In addition, the contractor shall provide a Help Desk Metrics Report that includes detailed and summary–level data on the following:

a. Government Satisfaction Survey Results
b. Agent Utilization
c. First Contact Resolution Rate

d. First Level Resolution Rate
e. Agent Satisfaction
f. Aggregate Service Desk Performance

2.5.7.8 SUBTASK 8 – PROVIDE HELP DESK SOFTWARE TO GOVERNMENT

The contractor shall enable help desk licenses for use by Government employees to provide business/functional help desk services to its employees or to allow users to enter inquiries directly into the system. The contractor shall also provide sufficient infrastructure capacity to support the additional ticket volume generated by the entity.

2.5.7.9 SUBTASK 9 – PERFORM ADDITIONAL HELP DESK SERVICES ON BEHALF OF THE ENTITIES

The contractor shall provide additional help desk services on behalf of the entities as requested. Help desk services could include business, functional, and/or process help desk support as defined by the entity.

2.5.7.10 SUBTASK 10 – MAINTAIN HELP AND TRAINING CONTENT

The contractor shall maintain the context-based help content and training material content to reflect changes to the system and improve the content based on user feedback.

2.5.7.11 SUBTASK 11 – RESPOND TO AUDIT REQUESTS

The contractor shall assist entities by providing specialized data extracts and documentation support during system audits, which occur approximately two to four times per year. These requests may require identifying or providing new documentation, or creating custom extracts to satisfy the requirements of the audit request. The contractor shall perform this action upon written notification by the TPOC as needed.

The contractor shall develop a data retention strategy for an entity that is being dissolved.

2.5.8 TASK 8 – PROVIDE SECURITY MANAGEMENT

The contractor shall provide security management support for HR and T&A systems and associated services that shall support HR and T&A business functions. GSA security-related regulations identified in the paragraphs below and in Section 7.3 shall be adhered to for the GSA HR-managed environment and the organizations being supported within the GSA environment. For organizations outside the GSA-managed environment (OPM, NCUA, RRB, and USIP) covered under this TO, the contractor shall ensure that it complies with the internal security regulations pertinent to those organizations.

2.5.8.1 SUBTASK 1 – ASSESSMENT AND AUTHORIZATION (A&A) ACTIVITIES

The implementation of a new Federal Government IT system requires a formal approval process known as Assessment and Authorization (A&A). NIST Special Publication 800-37, Revision 1 (hereafter described as NIST 800-37) and GSA IT Security Procedural Guide 06-30, “Managing Enterprise Risk,” provide guidelines for performing the A&A process. The contractor system/application must have a valid A&A, known as an ATO (signed by the Federal Government) before going into operation and processing Federal information. The failure to

obtain and maintain a valid ATO will result in the termination of the contract. The system must have a new A&A conducted (signed by the Federal Government) at least every three years or at the discretion of the Authorizing Official when there is a significant change to the system's security posture. All NIST 800-53 controls must be tested/assessed every three years or as defined by policy.

2.5.8.1.1 ASSESSING THE SYSTEM

a. The contractor shall comply with A&A requirements as mandated by Federal laws and policies, including making available any documentation, physical access, and logical access needed to support this requirement. The level of effort for the A&A is based on the System's NIST Federal Information Processing Standard (FIPS) Publication 199 categorization. The contractor shall create, maintain, and update the following A&A documentation:
    1. System Security Plan (SSP) completed in agreement with NIST Special Publication 800-18, Revision 1, "Guide for Developing Security Plans for Federal Information Systems." The SSP shall include, as appendices, required policies and procedures across 18 control families mandated per FIPS 200, Rules of Behavior, and Interconnection Agreements (in agreement with NIST Special Publication 800-47, "Security Guide for Interconnecting Information Technology Systems"). The SSP shall include, as an appendix, a completed GSA 800-53 Control Tailoring worksheet included in Appendix A of this guide. Column E of the worksheet titled "Contractor Implemented Settings" shall document all contractor-implemented settings that are different from the GSA-defined setting and where the GSA-defined setting allows a contractor-determined setting).
    2. Contingency Plan (including Disaster Recovery Plan) completed in agreement with NIST Special Publication 800-34.
    3. Contingency Plan Test Report completed in agreement with GSA IT Security Procedural Guide 06-29, "Contingency Plan Testing."
    4. Plan of Actions and Milestones (POA&M) completed in agreement with GSA IT Security Procedural Guide 09-44, "Plan of Action and Milestones (POA&M)."
    5. Penetration Test Reports documenting the results of vulnerability analysis and exploitability of identified vulnerabilities. Note: Penetration testing is required for all FIPS 199 low impact and moderate impact internet-accessible information systems, and all FIPS 199 high impact information systems are required to complete an independent penetration test and provide an Independent Penetration Test Report documenting the results of the exercise as part of the A&A package. Reference GSA IT Security Procedural Guide 06-30: "Managing Enterprise Risk" and GSA IT Security Procedural Guide 11-51, "Conducting Penetration Test Exercises" for penetration testing guidance.
b. Information systems must be assessed and authorized every three years or whenever there is a significant change to the system's security posture in accordance with NIST Special Publication 800-37 Revision 1, "Guide for the Security Certification and Accreditation of Federal Information Systems," and CIO IT Security 06-30, "Managing Enterprise Risk."

c. At the moderate impact level and higher, the contractor shall be responsible for providing an independent Security Assessment/Risk Assessment in accordance with GSA IT Security Procedural Guide 06-30, "Managing Enterprise Risk."

- If the Government is responsible for providing a Security Assessment/Risk Assessment and Penetration Test, the contractor shall allow GSA employees (or GSA-designated third-party contractors) to conduct A&A activities to include control reviews in accordance with NIST 800-53/NIST 800-53A and GSA IT Security Procedural Guide 06-30, "Managing Enterprise Risk." Review activities include, but are not limited to, operating system vulnerability scanning, web application scanning, and database scanning of applicable systems that support the processing, transportation, storage, or security of GSA information. This includes the general support system infrastructure.

d. Identified gaps between required 800-53 controls and the contractor's implementation as documented in the Security Assessment/Risk Assessment Report shall be tracked for mitigation in a POA&M document completed in accordance with GSA IT Security Procedural Guide 09-44, "Plan of Action and Milestones (POA&M)." Depending on the severity of the gaps, the Government may require the gaps to be remediated before an ATO is issued.

e. The contractor is responsible for mitigating all security risks found during A&A and continuous monitoring activities. All high-risk vulnerabilities must be mitigated within 30 days and all moderate risk vulnerabilities must be mitigated within 90 days from the date vulnerabilities are formally identified. The Government will determine the risk rating of vulnerabilities.

2.5.8.1.2 AUTHORIZATION OF THE SYSTEM

a. Upon receipt of the documentation (Security Authorization Package (SAP)) described in GSA IT Security Procedural Guide 06-30, "Managing Enterprise Risk" and NIST Special Publication 800-37 as documented above, the GSA Authorizing Official (AO) for the system (in coordination with the GSA Chief Information Security Officer (CISO), system PM, Information System Security Manager (ISSM), and Information System Security Officer (ISSO) will render an authorization decision to:

   1. Authorize system operation without any restrictions or limitations on its operation.
   2. Authorize system operation with restriction or limitation on its operation.
   3. Not authorize operation.

b. When requested, the contractor shall provide access to the Federal Government, or its designee acting as its agent, in order to verify compliance with the requirements for an IT security program. At its option, the Government may choose to conduct on-site surveys. The contractor shall make appropriate personnel available for interviews and documentation during this review. If documentation is considered proprietary or sensitive, these documents may be reviewed on-site under the hosting contractor's supervision.

2.5.8.2 SUBTASK 2 – REPORTING AND CONTINUOUS MONITORING

Maintenance of the security authorization to operate shall be through continuous monitoring of security controls of the contractor's system and its environment of operation to determine if the security controls in the information system continue to be effective over time in light of changes that occur in the system and environment.

Through continuous monitoring, security controls and supporting deliverables are updated and submitted to the Government. The following shall provide a current understanding of the security state and risk posture of the information systems. These shall allow GSA AOs to make credible risk-based decisions regarding the continued operations of the information systems and initiate appropriate responses as needed when changes occur.

The contractor shall:

a. Provide POA&M updates in accordance with requirements and the schedule set forth in GSA CIO IT Security Procedural Guide 09-44, "Plan of Action and Milestones."
b. Provide vulnerability scan reports from Web Application, Database, and Operating System Scans. Scan results shall be managed and mitigated in POA&Ms and submitted together with the quarterly POA&M submission.
c. Review and update the SSP annually to ensure the plan is current and accurately describes implemented system controls and reflects changes to the contractor system and its environment of operation. The SSP must be in accordance with NIST 800-18, Revision 1, Guide for Developing Security Plans.
d. Provide an annual update to the contingency plan completed in accordance with NIST 800-34, Contingency Planning Guide.
e. Provide the results of the annual review and validation of system users' accounts to ensure the continued need for system access. The user certification and authorization documents shall illustrate the organization establishes, activates, modifies, reviews, disables, and removes information system accounts in accordance with documented account management procedures.
f. Develop and furnish a separation of duties matrix reflecting proper segregation of duties for IT system maintenance, management, and development processes. The separation of duties matrix shall be updated or reviewed on an annual basis.
g. Provide the results of security awareness (AT-2) and role-based information security technical training (AT-3). AT-2 requires basic security awareness training for employees and contractors that support the operation of the contractor system. AT-3 requires information security technical training to information system security roles. Training shall be consistent with the requirements contained in C.F.R. Part 5 Subpart C (5 C.F.R 930.301) and conducted at least annually.
h. Deliver the results of the annual FISMA assessment conducted per GSA Chief Information Officer (CIO) IT Security Procedural Guide 04-26, "FISMA Implementation." The assessment is completed using the GSA on-line assessment tool.
i. Provide a well-defined, documented, and up-to-date specification to which the information system is built.
j. Establish and document mandatory configuration settings for IT products employed within the information system that reflect the most restrictive mode consistent with

operational requirements. Configuration settings are the configurable security-related parameters of IT products that compose the information system. Systems shall be configured in agreement with GSA technical guidelines, NIST guidelines, Center for Internet Security guidelines (Level 1), or industry best practice guidelines in hardening the systems, as deemed appropriate by the Authorizing Official.

k. Provide an annual update to the Configuration Management Plan for the information system.

l. Provide a contingency plan test report completed in accordance with GSA IT Security Procedural Guide 06-29, "Contingency Plan Testing." A continuity test shall be conducted annually prior to mid-July of each year. The continuity test can be a table top test while the system is at the "Low Impact" level. The table top test must include Federal and hosting contractor representatives. Moderate and high impact systems must complete a functional exercise at least once every three years.

m. Provide an incident response plan test report documenting results of incident reporting process per GSA IT Security Procedural Guide 01-02, "Incident Handling."

n. Provide the results of annual reviews and validations of physical access authorizations to facilities supporting the contractor system to ensure the continued need for physical access.

o. Provide the results of annual reviews and validations of visitor access records to ensure the accuracy and fidelity of collected data.

p. Provide updated Interconnection Security Agreements (ISA) and supporting Memorandum of Agreement/Understanding (MOA/U), completed in accordance with NIST 800-47, "Security Guide for Connecting Information Technology Systems," for existing and new interconnections. Per NIST 800-47, an interconnection is the direct connection of two or more IT systems for the purpose of sharing data and other information resources through a pipe, such as ISDN, T1, T3, DS3, VPN, etc. Interconnections agreements shall be submitted as appendices to the SSP.

q. Define and establish Rules of Behavior for information system users. Rules of Behavior shall be submitted as an appendix to the SSP.

2.5.8.3 SUBTASK 3 – POLICIES AND PROCEDURES

The contractor shall develop and maintain current the following policies and procedures:

a. Access Control Policy and Procedures (NIST 800-53 AC-1)

b. Security Awareness and Training Policy and Procedures (NIST 800-53 AT-1)

c. Audit and Accountability Policy and Procedures (NIST 800-53 AU-1)

d. Identification and Authentication Policy and Procedures (NIST 800-53 IA-1)

e. Incident Response Policy and Procedures (NIST 800-53 IR-1, reporting timeframes are documented in GSA CIO IT Security Procedural Guide 01-02, Incident Handling

f. System Maintenance Policy and Procedures (NIST 800-53 MA-1)

g. Media Protection Policy and Procedures (NIST 800-53 MP-1)

h. Physical and Environmental Policy and Procedures (NIST 800-53 PE-1)

i. Personnel Security Policy and Procedures (NIST 800-53 PS-1)

j. System and Information Integrity Policy and Procedures (NIST 800-53 SI-1)

k. System and Communication Protection Policy and Procedures (NIST 800-53 SC-1)
l. Key Management Policy (NIST 800-53 SC-12)

2.5.9 TASK 9 – ENHANCEMENTS, FUTURE SYSTEM FUNCTIONALITY, AND OTHER SERVICES (OPTIONAL)

This Optional Task provides the ability for an entity to obtain enhancements to the solution managed under this TO as well as new system functionality and additional services from the contractor provided under SINs 22 and 26. Examples of enhancements include new interfaces, reports, and system functionality. Examples of future systems include learning management, staff acquisition, imaging, position description, help desk, and data repositories/warehouses, and could include the software as well as program management, requirements and business analysis, hosting, configuration, implementation, testing training, and rollout of the new systems. Services include transitioning an agency to an existing or new environment, developing training material and conducting training, increasing the level of help desk services, migrating data to a data repository or system database, performing requirements or business analysis, and providing services for future systems or large enhancements to the existing solution.

2.5.9.1 SUBTASK - 1 TRANSITION-OFF AN EXISTING ENTITY (OPTIONAL)

The contractor shall provide support required to transition an existing entity to a different service provider's systems or to an internal system, including exporting data and providing it to the new provider. The contractor shall also support the dissolution and closing out of an entity's activities and data in the system.

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4.1 PLACE OF INSPECTION AND ACCEPTANCE

Inspection and acceptance of all work performance, reports, and other deliverables under this TO shall be performed in the Washington, D.C. metro area by the OHRM TPOC, in coordination with the FEDSIM COR.

4.2 SCOPE OF INSPECTION

All deliverables will be inspected for content, completeness, accuracy, and conformance to TO requirements by the FEDSIM COR. Inspection may include validation of information or software through the use of automated tools, testing, or inspections of the deliverables, as specified in the TO. The scope and nature of this inspection will be sufficiently comprehensive to ensure the completeness, quality, and adequacy of all deliverables.

The Government requires a period NTE 15 workdays after receipt of final deliverable items for inspection and acceptance or rejection.

4.3 BASIS OF ACCEPTANCE

The basis for acceptance shall be in compliance with the requirements set forth in the TO, the contractor's quote, and relevant terms and conditions of the contract. Deliverable items rejected shall be corrected in accordance with the applicable clauses (Section 9, Attachment J).

Reports, documents, and narrative-type deliverables will be accepted when all discrepancies, errors, or other deficiencies identified in writing by the Government have been corrected.

If the draft deliverable is adequate, the Government may accept the draft and provide comments for incorporation into the final version.

All of the Government's comments on deliverables must either be incorporated in the succeeding version of the deliverable, or the contractor must explain to the Government's satisfaction why such comments should not be incorporated.

If the Government finds that a draft or final deliverable contains spelling errors, grammatical errors, or improper format, or otherwise does not conform to the requirements stated within this TO, the document may be immediately rejected without further review and returned to the contractor for correction and resubmission. If the contractor requires additional Government guidance to produce an acceptable draft, the contractor shall arrange a meeting with the FEDSIM COR.

4.4 DRAFT DELIVERABLES

The Government will provide written acceptance, comments, and/or change requests, if any, within 15 workdays (unless specified otherwise in Section 5 - Deliverables or Performance) from Government receipt of the draft deliverable.

Upon receipt of the Government comments, the contractor shall have ten workdays to incorporate the Government's comments and/or change requests and to resubmit the deliverable in its final form.

4.5 WRITTEN ACCEPTANCE/REJECTION BY THE GOVERNMENT

The FEDSIM CO or COR will provide written notification of acceptance or rejection of all final deliverables within 15 workdays (unless specified otherwise in Section 5 - Deliverables or Performance). All notifications of rejection will be accompanied with an explanation of the specific deficiencies causing the rejection.

4.6 NON-CONFORMING PRODUCTS OR SERVICES

Non-conforming products or services will be rejected. Deficiencies will be corrected, by the contractor, within ten workdays of the rejection notice. If the deficiencies cannot be corrected within ten workdays, the contractor shall immediately notify the FEDSIM COR of the reason for the delay and provide a proposed corrective action plan within ten workdays.

If the contractor does not provide products or services that conform to the requirements of this TO, the Government will not pay the fixed price associated with the non-conforming products or services.

5.1 PERIOD OF PERFORMANCE

The period of performance for this TO is one six-month Base Period, one 12-month Option Period, one six-month Option Period, followed by eight, 12-month Option Periods as shown in the table below.

Period	Duration
Base period	6 months
Option 1	12 months
Option 2	6 months
Option 3-10	12 months each

Normal hours of operations are Monday through Friday from 8am-5pm Eastern Time.

5.2 PLACE OF PERFORMANCE

Place of performance is the contractor's facilities. The contractor may be required to travel to GSA facilities within the Continental United States (CONUS).

5.3 TASK ORDER SCHEDULE AND MILESTONE DATES

The following schedule of milestones will be used by the FEDSIM COR to monitor timely progress under this TO.

The following abbreviations are used in this schedule:

NLT: No Later Than
TOA: Task Order Award
All references to Days: Government Workdays

Deliverables are due the next Government workday if the due date falls on a holiday or weekend.

The contractor shall deliver the deliverables listed in the following table on the dates specified:

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
X	Project Start (PS)	-	At beginning of period of performance	None
01	Kick-Off Meeting	2.5.1.1	10 Calendar Days after beginning of period of performance	None
02	Spend Plan Draft	2.5.1.1	At Kick-Off Meeting; Updates in accordance with IMS	Unlimited IAW 52.227-14
03	Monthly Status Report	2.5.1.2	On the 10th of each Month	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
04	Weekly Status Reports	2.5.1.3	Weekly	Unlimited IAW 52.227-14
05	Project Management Plan Draft	2.5.1.4	At Kick-Off Meeting; Updates as needed	Unlimited IAW 52.227-14
06	Project Management Plan Final	2.5.1.4	20 calendar days after beginning of period of performance; Updates as needed	Unlimited IAW 52.227-14
07	Communications Plan	2.5.1.4.1	In accordance with the PMP	Unlimited IAW 52.227-14
08	Communications Content and Materials	2.5.1.4.1	In accordance with the PMP	Unlimited IAW 52.227-14
09	Migration Communication Plan	2.5.1.4.1	In accordance with the IMS	Unlimited IAW 52.227-14
10	Staffing Management Plan	2.5.1.4.2	In accordance with the PMP	Unlimited IAW 52.227-14
11	Risk Management Plan and Issue/Risk Log	2.5.1.4.3	In accordance with the PMP	Unlimited IAW 52.227-14
12	Risk Reviews Report	2.5.1.4.3	Bi-weekly	Unlimited IAW 52.227-14
13	Quality Control Plan (QCP)	2.5.1.4.4	In accordance with the PMP	Unlimited IAW 52.227-14
14	Integrated Master Schedule (IMS) Draft	2.5.1.4.5	At Kick Off Meeting; Updated weekly	Unlimited IAW 52.227-14
15	Fit/Gap Analysis Sessions	2.5.2	In accordance with the IMS	Unlimited IAW 52.227-14
16	Fit/Gap Analysis Report	2.5.2.2	In accordance with the IMS	Unlimited IAW 52.227-14
17	Proof of Concept Demonstration	2.5.2.3	In accordance with the IMS	Unlimited IAW 52.227-14
18	BPR Plan and Schedule	2.5.2.4	In accordance with the IMS	Unlimited IAW 52.227-14
19	BPR Meeting Materials	2.5.2.4	In accordance with the IMS	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
20	Initial Migration Plan and Schedule	2.5.2.5	In accordance with the IMS	Unlimited IAW 52.227-14
21	Hosting Setup Plan	2.5.3.1	20 business days after beginning of period of performance	Unlimited IAW 52.227-14
22	Hosting Set Up Report	2.5.3.1	5 days after completion of Hosting Set up	Unlimited IAW 52.227-14
23	Performance Report	2.5.3.1	5 days after completion of Hosting Set up; Updates Weekly	Unlimited IAW 52.227-14
24	Data Cleanup Plan	2.5.4.2	In accordance with the IMS	Unlimited IAW 52.227-14
25	System Documentation Technical Manual	2.5.3.8	In accordance with the IMS	Unlimited IAW 52.227-14
26	Data Conversion Plan	2.5.4.2	In accordance with the IMS	Unlimited IAW 52.227-14
27	Data Migration Plan	2.5.4.2	In accordance with the IMS	Unlimited IAW 52.227-14
28	Data Conversion and Migration Report	2.5.4.2	In accordance with the IMS	Unlimited IAW 52.227-14
29	Mitigation/Deployment Plan	2.5.4.3	In accordance with IMS	Unlimited IAW 52.227-14
30	Post-Deployment Review Report	2.5.4.3	In accordance with IMS	Unlimited IAW 52.227-14
31	Lessons Learned Report	2.5.4.3	In accordance with IMS	Unlimited IAW 52.227-14
32	Requirements Traceability Matrix	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
33	Design Review Sessions	2.5.4.4	Upon completion of designs	Unlimited IAW 52.227-14
34	Configuration Files	2.5.4.4	5 days prior to each release	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
35	System Architecture Document	2.5.4.4	At design review and as architecture changes	Unlimited IAW 52.227-14
36	Interface Control Documents	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
37	System Design Document (SDD)	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
38	Product Architecture Document	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
39	Functional Flow Document	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
40	Hardware Architecture Document	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
41	Topological Architecture Diagram	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
42	Nodes Connectivity Diagram	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
43	Version Description Document	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
44	System Change Control Plan	2.5.4.5	In accordance with the IMS	Unlimited IAW 52.227-14
45	Configuration Management Plan	2.5.4.5.1	In accordance with the IMS	Unlimited IAW 52.227-14
46	Security Configuration Checklist	2.5.4.5.1	10 business days prior to first rollout	Unlimited IAW 52.227-14
47	System Configuration and Change Control Governance Plan	2.5.4.5.2	In accordance with the PMP	Unlimited IAW 52.227-14
48	Test Plan	2.5.4.11.1	In accordance with the IMS	Unlimited IAW 52.227-14
49	Test Scenarios	2.5.4.11.2	In accordance with the IMS	Unlimited IAW 52.227-14
50	Test Cases	2.5.4.11.2	In accordance with the IMS	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
51	Test Scripts	2.5.4.11.2	In accordance with the IMS	Unlimited IAW 52.227-14
52	Test Readiness Go/No-Go Form	2.5.4.11.2	In accordance with the IMS	Unlimited IAW 52.227-14
53	Test Report	2.5.4.11.3	In accordance with the IMS	Unlimited IAW 52.227-14
54	Operational Readiness Technical Manuals	2.5.4.11.5	In accordance with the IMS	Unlimited IAW 52.227-14
55	Systems Management Guide	2.5.4.11.5	In accordance with the IMS	Unlimited IAW 52.227-14
56	Incident Response Plan	2.5.4.11.5	90 days after beginning of period of performance	Unlimited IAW 52.227-14
57	Deployment and Cutover Acceptance Plan	2.5.4.12	In accordance with the IMS	Unlimited IAW 52.227-14
58	Deployment and Cutover Acceptance Checklist	2.5.4.12	In accordance with the IMS	Unlimited IAW 52.227-14
59	Continuity of Operations Plan	2.5.4.13	In accordance with the IMS	Unlimited IAW 52.227-14
60	Functional Process Documentation	2.5.4.14	In accordance with the IMS	Unlimited IAW 52.227-14
61	BPR Report	2.5.4.14	In accordance with the IMS	Unlimited IAW 52.227-14
62	Training Plan	2.5.5.1	In accordance with the IMS	Unlimited IAW 52.227-14
63	Training Schedule	2.5.5.1	In accordance with the IMS	Unlimited IAW 52.227-14
64	Training Materials	2.5.5.2	In accordance with the IMS	Unlimited IAW 52.227-14
65	Standard Operating Procedures	2.5.5.2	In accordance with IMS	Unlimited IAW 52.227-14
66	Training Evaluations	2.5.5.4	After each training session	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
67	Closeout Plan	2.5.6.2	In accordance with IMS	Unlimited IAW 52.227-14
68	Transition Meeting	2.5.6.2	In accordance with IMS	Unlimited IAW 52.227-14
69	Closeout Report	2.5.6.2	20 days prior to closeout	Unlimited IAW 52.227-14
70	Stabilization Plan	2.5.6.3	10 business days prior to first rollout	Unlimited IAW 52.227-14
71	Stabilization Report	2.5.6.3	Weekly, after the first rollout	Unlimited IAW 52.227-14
72	Performance Report	2.5.6.3	Weekly, after the first rollout	Unlimited IAW 52.227-14
73	Post-Migration Support Report	2.5.6.4	Weekly, after the first rollout	Unlimited IAW 52.227-14
74	Post-Migration Findings and Recommendation Report	2.5.6.4	Monthly, after the first rollout	Unlimited IAW 52.227-14
75	Release Notes	2.5.7.1.1	5 business days prior to each release	Unlimited IAW 52.227-14
76	Installation Guide	2.5.7.1.1	5 business days prior to each release	Unlimited IAW 52.227-14
77	User Guide	2.5.7.1.1	5 business days prior to each release	Unlimited IAW 52.227-14
78	Data Dictionary	2.5.7.1.1	5 business days prior to each release	Unlimited IAW 52.227-14
79	Change Control Governance Plan	2.5.7.1.1	20 business days after beginning of period of performance	Unlimited IAW 52.227-14
80	Installation Guide	2.5.7.1.1	In accordance with IMS	Unlimited IAW 52.227-14
81	User Guide	2.5.7.1.1	In accordance with IMS	Unlimited IAW 52.227-14
82	Data Dictionary	2.5.7.1.1	In accordance with IMS	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
83	Release Management Plan	2.5.7.1.2	In accordance with IMS	Unlimited IAW 52.227-14
84	Configuration Management Plan	2.5.7.1.2	In accordance with the IMS	Unlimited IAW 52.227-14
85	Ongoing Managed Services Support Plan	2.5.7.2.2	10 business days after beginning of period of performance	Unlimited IAW 52.227-14
86	Production Operations Manual	2.5.7.2.2	In accordance with IMS	Unlimited IAW 52.227-14
87	Routine Maintenance Schedule	2.5.7.2.2	In accordance with IMS	Unlimited IAW 52.227-14
88	User Satisfaction Review	2.5.7.2.2	In accordance with IMS	Unlimited IAW 52.227-14
89	System Performance Report	2.5.7.2.2	10 business days after beginning of period of performance; Updates weekly	Unlimited IAW 52.227-14
90	Incident Management Plan	2.5.7.6	In accordance with IMS	Unlimited IAW 52.227-14
91	Help Desk Metrics Report	2.5.7.7	10 business days after beginning of period of performance; Updates weekly	Unlimited IAW 52.227-14
92	System Security Plan	2.5.8.1.1	In accordance with the IMS	Unlimited IAW 52.227-14
93	Extensions and Customization code	2.5.4.4	In accordance with IMS	Unlimited IAW 52.227-14

The contractor shall mark all deliverables listed in the above table to indicate authorship by contractor (i.e., non-Government) personnel; provided, however, that no deliverable shall contain any proprietary markings inconsistent with the Government's data rights set forth in this TO. The Government reserves the right to treat non-confirming markings in accordance with subparagraphs (e) and (f) of the FAR clause at 52.227-14.

5.4 PUBLIC RELEASE OF CONTRACT DOCUMENTS REQUIREMENT

The contractor agrees to submit, within ten workdays from the date of the CO's execution of the initial TO, or any modification to the TO (exclusive of Saturdays, Sundays, and Federal holidays), a portable document format (PDF) file of the fully executed document with all

proposed necessary redactions, including redactions of any trade secrets or any commercial or financial information that it believes to be privileged or confidential business information, for the purpose of public disclosure at the sole discretion of GSA. The contractor agrees to provide a detailed written statement specifying the basis for each of its proposed redactions, including the applicable exemption under the Freedom of Information Act (FOIA), 5 U.S.C. § 552, and, in the case of FOIA Exemption 4, 5 U.S.C. § 552(b)(4), shall explain why the information is considered to be a trade secret or commercial or financial information that is privileged or confidential. Information provided by the contractor in response to the contract requirement may itself be subject to disclosure under the FOIA. Submission of the proposed redactions constitutes concurrence of release under FOIA.

GSA will carefully consider all of the contractor's proposed redactions and associated grounds for nondisclosure prior to making a final determination as to what information in such executed documents may be properly withheld.

5.5 DELIVERABLES MEDIA

The contractor shall deliver all electronic versions by email and removable electronic media, as well as placing in the GSA OHRM's designated repository. The following are the required electronic formats, whose versions must be compatible with the latest, commonly available version on the market.

Text	MS Word, Google Docs
Spreadsheets	MS Excel, Google Sheets
Briefings	MS PowerPoint, Google Slides
Drawings	MS Visio, Google Drawings
Schedules	MS Project, Smartsheet

5.6 PLACE(S) OF DELIVERY

Copies of all deliverables shall be delivered to the FEDSIM COR and GSA OHRM TPOC at the following addresses:

GSA FAS AAS FEDSIM
ATTN: Angelica Matias, COR
1800 F Street, NW
Suite 3100 (QF0B)
Washington, D.C. 20405
Telephone: (202) 306-5261
Email: angelica.matias@gsa.gov

OHRM TPOC Contact Information to be provided after Award. Additional TPOCs will be assigned to separate agencies post-migration.

5.7 NOTICE REGARDING LATE DELIVERY/ PROBLEM NOTIFICATION REPORT (PNR)

The contractor shall notify the FEDSIM COR via a Problem Notification Report (PNR) (Section 9 - List of Attachments, Attachment D as soon as it becomes apparent to the contractor that a scheduled delivery will be late. The contractor shall include in the PNR the rationale for late delivery, the expected date for the delivery, and the project impact of the late delivery. The

FEDSIM COR will review the new schedule and provide guidance to the contractor. Such notification in no way limits any Government contractual rights or remedies including, but not limited to, termination.

5.8 GSA INFORMATION TECHNOLOGY (IT) SECURITY REQUIREMENTS

The contractor shall deliver an IT Security Plan within 30 calendar days of award that describes the processes and procedures that will be followed to ensure appropriate security of IT resources that are developed, processed, or used under this order. The IT Security Plan shall comply with applicable Federal laws including, but not limited to, 40 U.S.C. 11331, the FISMA of 2002, and the E-Government Act of 2002. The IT Security Plan shall meet IT security requirements in accordance with Federal and GSA policies and procedures, including General Services Administration Regulation (GSAR) clause 552.239-71. The contractor shall submit written proof of IT security authorization six months after award, and verify that the IT Security Plan remains valid annually.

6.1 CONTRACTING OFFICER'S REPRESENTATIVE (COR)

The FEDSIM CO appointed a FEDSIM COR in writing through a COR Appointment Letter (Section 9 – List of Attachments, Attachment A). The FEDSIM COR will receive, for the Government, all work called for by the TO and will represent the FEDSIM CO in the technical phases of the work. The FEDSIM COR will provide no supervisory or instructional assistance to contractor personnel.

The FEDSIM COR is not authorized to change any of the terms and conditions, scope, schedule, and price of the Contract or the TO. Changes in the scope of work will be made only by the FEDSIM CO by properly executed modifications to the Contract or the TO.

6.1.1 CONTRACT ADMINISTRATION

Contracting Officer:

Mark H. Santasiero
GSA FAS AAS FEDSIM
1800 F Street, NW
Washington, D.C. 20405
Telephone: 202-501-4496
Email: mark.santasiero@gsa.gov

Contracting Officer's Representative:

Angelica A. Matias
GSA FAS AAS FEDSIM
1800 F Street, NW
Washington, D.C. 20405
Telephone: (202) 306-5261
Email: angelica.matias@gsa.gov

Technical Point of Contact:

Provided after award.

6.2 INVOICE SUBMISSION

The contractor shall submit Requests for Payments in accordance with the format contained in General Services Administration Acquisition Manual (GSAM) 552.232-25, PROMPT PAYMENT (NOV 2009), to be considered proper for payment. In addition, the following data elements shall be included on each invoice:

Task Order Number: (from GSA Form 300, Block 2)

Paying Number: (ACT/DAC NO.) (From GSA Form 300, Block 4)

FEDSIM Project Number: 2016007GS

Project Title: GSA HR and T&A Systems, Migration and Managed Service Support

The contractor shall certify with a signed and dated statement that the invoice is correct and proper for payment.

The contractor shall provide invoice backup data in accordance with the contract type, including detail such as labor categories, rates, and quantities of labor hours per labor category.

The contractor shall submit invoices as follows:

The contractor shall utilize FEDSIM's electronic Assisted Services Shared Information System (ASSIST) to submit invoices. The contractor shall submit invoices electronically by logging onto the following link (requires Internet Explorer to access the link):

https://portal.fas.gsa.gov

Log in using your assigned ID and password, navigate to the order against which you want to invoice, click the Invoices and Acceptance Reports link in the left navigator, and then click the Create New Invoice button. The AASBS Help Desk should be contacted for support at 877-472-4877 (toll free) or by email at AASBS.helpdesk@gsa.gov. By utilizing this method, no paper copy of the invoice shall be submitted to GSA FEDSIM or the GSA Finance Center. However, the FEDSIM COR may require the contractor to submit a written "hardcopy" invoice with the client's certification prior to invoice payment. A paper copy of the invoice is required for a credit.

6.3 INVOICE REQUIREMENTS

The contractor shall submit a draft copy of an invoice to the client POC for review prior to its submission to GSA. The draft invoice shall not be construed as a proper invoice in accordance with FAR 32.9 and GSAM 532.9.

If the TO has different contract types, each should be addressed separately in the invoice submission.

The final invoice is desired to be submitted within six months of project completion.

6.3.1 TIME-AND-MATERIAL (T&M) CLINS (FOR LABOR)

The contractor may invoice monthly on the basis of cost incurred for the T&M CLINs. The invoice shall include the period of performance covered by the invoice and the CLIN number and title. All hours and costs shall be reported by CLIN element (as shown in Section 1 – Supplies or Services and Price/Costs), by contractor employee, and shall be provided for the current billing month and in total from project inception to date. The contractor shall provide the invoice data in spreadsheet form with the following detailed information. The listing shall include separate columns and totals for the current invoice period and the project to date.

a. Employee name (current and past employees)
b. Employee company labor category
c. Employee labor category
d. Monthly and total cumulative hours worked
e. Corresponding ceiling rate
f. Cost incurred not billed

6.3.2 FIRM-FIXED-PRICE (FFP) CLINS

The contractor may invoice as stated in Section 1 – Supplies or Services and Price/Costs for the FFP CLINs. The invoice shall include the period of performance covered by the invoice and the CLIN number and title. All costs shall be reported by CLIN element (as shown in Section 1 – Supplies or Services and Price/Costs) and shall be provided for the current invoice and in total from project inception to date. The contractor shall provide the invoice data in spreadsheet form with the following detailed information. The listing shall include separate columns and totals for the current invoice period and the project to date.

a. FFP (period of performance – as stated in Section 1 – Supplies or Services and Price/Costs)

6.3.3 OTHER DIRECT COSTS (ODCs)

The contractor may invoice monthly on the basis of cost incurred for the ODC CLINs. The invoice shall include the period of performance covered by the invoice and the CLIN number and title. In addition, the contractor shall provide the following detailed information for each invoice submitted, as applicable. Spreadsheet submissions, in MS Excel format, are required.

a. ODCs purchased
b. Date delivery accepted by the Government
c. Associated CLIN
d. Project-to-date totals by CLIN
e. Cost incurred not billed
f. Remaining balance of each CLIN
g. Indirect Handling Rate

All cost presentations provided by the contractor shall also include Overhead charges, General and Administrative charges and Fee in accordance with the contractor's Defense Contract Audit Agency (DCAA) cost disclosure statement.

6.3.4 TRAVEL

Contractor costs for travel will be reimbursed at the limits set in the following regulations (see FAR 31.205-46):

a. Joint Travel Regulation (JTR) - prescribed by the GSA, for travel in the contiguous U.S.
b. Federal Travel Regulation (FTR) Volume 2, Department of Defense (DoD) Civilian Personnel, Appendix A - prescribed by the DoD, for travel in Alaska, Hawaii, and outlying areas of the U.S.

The contractor may invoice monthly on the basis of cost incurred for cost of travel comparable with the JTR/FTR. The invoice shall include the period of performance covered by the invoice, the CLIN number and title. Separate worksheets, in MS Excel format, shall be submitted for travel.

CLIN/Task Total Travel: This invoice information shall identify all cumulative travel costs billed by CLIN/Task. The current invoice period's travel details shall include separate columns and totals and include the following:

a. Travel Authorization Request identifier, approver name, and approval date

b. Current invoice period
c. Names of persons traveling
d. Number of travel days
e. Dates of travel
f. Number of days per diem charged
g. Per diem rate used
h. Total per diem charged
i. Transportation costs (rental car, air fare, etc.)
j. Total charges
k. Explanation of variances exceeding 10 percent of the approved versus actual costs
l. Indirect handling rate

All cost presentations provided by the contractor shall also include Overhead charges and General and Administrative charges in accordance with the contractor's DCAA cost disclosure statement.

7.1 KEY PERSONNEL

The following are the minimum personnel who shall be designated as "Key." The Government does not intend to dictate the composition of the ideal team to perform this TO.

a. Program Manager (PM)
b. Migration Manager
c. Functional Lead
d. Business Process Realignment (BPR) Lead
e. Managed Services Lead
f. Technical Lead
g. Enhancement Lead

The Government desires that Key Personnel be assigned for the duration of the TO. Key Personnel may be replaced or removed subject to Section 7.1.8 - Key Personnel Substitution.

7.1.1 PROGRAM MANAGER (PM)

The PM shall be responsible for all activities through final deployment of the HR and T&A solution and cutover to production.

It is required that the PM has the following qualifications:

a. 10 years of experience managing and supervising employees of various labor categories and skills in projects similar in size and scope as referenced under this RFQ.

It is desired that the PM has the following qualifications:

a. 15 years of experience managing complex HR system implementation projects of a nature similar in size (or larger) and scope as referenced under this RFQ.
b. 15 years of experience in leadership of complex tasks, including review of work products and deliverables for correctness, compliance with industry best practices, and Federal Government standards.
c. 15 years of experience translating RFQ requirements into project plans and milestones, directing and implementing plans, and presenting formal project status/plan briefings to Government managers.

7.1.2 MIGRATION MANAGER

The contractor shall provide a Migration Manager who shall focus on the initial pre-migration preparation, migration, and stabilization activities. The Migration Manager shall be the primary POC through which communications, work assignments, and technical direction flow between GSA and the contractor during the initial migration phase. The Migration Manager shall also backup the PM as needed to ensure continuous senior level oversight of the program and interaction with the customer.

It is required that the Migration Manager has the following qualifications:

a. Minimum of 10 years of experience managing large, complex, enterprise system migration projects (greater than 20,000 users).

b. Experience managing at least one Federal migration project.

It is desired that the Migration Manager has the following qualifications:

a. Minimum of five years of experience migrating an in-house enterprise system to a Software as a Service platform utilizing a COTS software product or migrating HR and T&A systems from one Software as a Service vendor to another.
b. Experience managing at least one Federal HR and T&A migration project using the proposed solution.
c. Experience managing system migrations or system development projects in a Federal multi-customer fee-for-service environment.

7.1.3 FUNCTIONAL LEAD

The contractor shall provide a Functional Lead who shall focus on pre-migration, migration, and stabilization activities. The focus of the Functional Lead would be Fit/Gap analysis, proof of concept, testing and business configuration of the systems.

It is required that the Functional Lead has the following qualifications:

a. Minimum of 10 years of experience leading the functional components of large, complex migration projects, of which five years should be in a Federal environment.
b. Experience leading fit/gap analysis efforts in the HR business domain.

It is desired that the Functional Lead has the following qualifications:

a. Experience migrating in-house enterprise HR and T&A systems to the proposed HR and T&A systems solution or migrating HR and T&A systems from one Software as a Service vendor to another
b. Experience migrating an in-house enterprise system to a Software as a Service platform.
c. In-depth knowledge of the HR business domain.

7.1.4 BUSINESS PROCESS REALIGNMENT (BPR) LEAD

The contractor shall provide a BPR Lead who shall focus on BPR activities. The BPR Lead shall offer process and functional expertise and lead any BPR-related work.

It is required that the BPR Lead has the following qualifications:

a. Minimum of five years of experience leading the functional BPR components of large, complex migration projects, of which three years should be in a Federal environment.
b. Experience leading business process realignment efforts in the HR domain.

It is desired that the BPR Lead has the following qualifications:

a. Experience migrating in-house enterprise HR and T&A systems to the proposed HR and T&A systems solution or migrating HR and T&A systems from one Software as a Service vendor to another.
b. In-depth knowledge of the HR business domain.
c. Experience migrating an in-house enterprise system to a Software as a Service platform.

7.1.5 MANAGED SERVICES LEAD / PM

The contractor shall provide a Managed Services Lead, post migration, who shall focus on operating and maintaining all aspects of the environments. The Managed Services Lead shall be the primary POC through which communications, work assignments, and technical direction flow between GSA and the contractor. **The Managed Services Lead shall assume the responsibilities of the PM, during the post migration phase.**

It is required that the Managed Services Lead has the following qualifications:

a. Minimum of 10 years of experience managing large complex enterprise systems in a Software as a Service environment.
b. Experience transitioning from a configuration/development mode of operation, through stabilization, to steady state mode of operation.

It is desired that the Managed Services Lead has the following qualifications:

a. Experience in multiple IT platforms and architecture integration.
b. Experience managing operations for enterprise systems environments using the proposed HR and T&A systems solution.
c. Experiencing in overseeing incident management and help desk operations.

7.1.6 TECHNICAL LEAD

The contractor shall provide a Technical Lead who shall be responsible for all technical components of the work (e.g. conversion programs, interfaces, technical system configurations, security). The Technical Lead shall be responsible for technical system configuration for GSA and its four customers.

It is required that the Technical Lead has the following qualifications:

a. Minimum of 12 years of overall technical experience
b. Minimum of eight years of experience leading technical components of large, complex migration projects, four year of which were in a Federal environment.

It is desired that the Technical Lead has the following qualifications:

a. Demonstrated expertise in large integrated systems with HR application and technology architectures and platforms in an integrated environment, such as Security, data exchange technologies, development of interfaces and any extensions, supporting testing of these components.
b. Experience providing technical support and guidance during the configuration through implementation phases of large complex migration or system integration projects.
c. Experience in the software and technical architecture used in the proposed HR and T&A systems solutions.

7.1.7 ENHANCEMENT LEAD

The contractor shall provide an Enhancement Lead who will perform work related to the future development efforts, new software migrations, new entity migrations, release implementation and other development efforts that occur during GSA's managed services phase. During the

managed services Phase, the Enhancement Lead shall be responsible for enhancements and future systems and services through which communications, work assignments, and technical direction flow between GSA and the vendor. The Enhancement Lead shall be available to plan, direct, and control the overall management and operational functions. The Enhancement Lead will also backup the Managed Services lead as needed to ensure continuous senior level oversight and interaction with the customer.

It is required that the Enhancement Lead has the following qualifications:

a. Minimum of 10 years of experience managing large, complex, enterprise system migration projects (greater than 20,000 users).

It is desired that the Enhancement Lead has the following qualifications:

a. Five years' experience managing system migration or system development projects in a Federal environment.
b. Minimum of five years of experience migrating an in-house enterprise system to a Software as a Service platform.
c. Experience managing migration and development projects using the proposed HR and T&A systems solution.

7.1.8 KEY PERSONNEL SUBSTITUTION

The contractor shall not replace any personnel designated as Key Personnel without the written concurrence of the CO. Prior to utilizing other than personnel specified in quotes in response to a RFQ, the contractor shall notify the FEDSIM CO and the FEDSIM COR of the existing TO. This notification shall be no later than ten calendar days in advance of any proposed substitution and shall include justification (including resume(s) and labor category of proposed substitution(s)) in sufficient detail to permit evaluation of the impact on TO performance.
Substitute personnel qualifications shall be equal to, or greater than, those of the personnel being substituted. If the FEDSIM CO and the FEDSIM COR determine that a proposed substitute personnel is unacceptable, or that the reduction of effort would be so substantial as to impair the successful performance of the work under the TO, the contractor may be subject to default action as prescribed by FAR 52.249-6 Termination (Cost Reimbursement) or FAR 52.249-8, Default (Fixed-Price Supply and Service).

7.2 GOVERNMENT-FURNISHED PROPERTY (GFP) AND INFORMATION (GFI)

7.2.1 GFP

The Government will not provide the contractor with property. The contractor is responsible for providing its own property during the period of performance of this TO.

7.2.2 GFI

The Government will provide all necessary information, data, and documents to the contractor for work required under the TO. The contractor shall use Government-furnished information, data, and documents only for the performance of work under this TO, and shall be responsible for returning all Government-furnished information, data, and documents to the Government at the end of the performance period. The contractor shall not release Government-furnished

information, data, and documents to outside parties without the prior and explicit consent of the CO.

GSA will provide access to GSA specific systems/networks as required for support of requirements via a site-to-site, Virtual Private Network (VPN), or other technology. The contractor shall use GSA-provided software development and test accounts, document and requirements repositories, etc. as required for the development, storage, maintenance, and delivery of products within the scope of this effort.

7.3 SECURITY REQUIREMENTS

The preparation of the deliverables in this contract will be completed at a Sensitive but Unclassified (SBU) level. All contractor personnel that provide support with access to systems and/or data in support of this TO, shall, at a minimum, have an adjudicated National Agency Check with Inquiries (NACI), prior to contract award. An equivalent background investigation may be acceptable. No access shall be given to Government computer information systems and Government sensitive information without a background investigation being verified.

GSA shall sponsor the investigation when deemed necessary.

All GSA contractors that require access to a GSA computer or IT system are contractually subject to all GSA and Federal IT Security standards, policies, and reporting requirements. The contractor shall be responsible for properly protecting all information used, gathered, disclosed, or developed as a result of work under this contract. The contractor shall also protect all Government data by treating information as sensitive. All information gathered or created under this contract shall be considered as confidential information. If contractor personnel must remove any information from the primary work area they should protect it to the same extent they would their proprietary data and/or company trade secrets.

The contractor and all contractor employees assigned for any length of time in support of this procurement action will be required to sign a non-disclosure, restricting any use of inside information as procurement sensitive.

7.3.1 PERSONNEL SECURITY REQUIREMENTS

The contractor shall cooperate with the appropriate GSA officials to obtain building access passes and computer access for all contractor-related personnel assigned to work within any GSA office. The contractor shall conform to any GSA security requirements.

Furnish documentation reflecting favorable adjudication of background investigations for all personnel (including subcontractors) supporting the system. Contractors shall comply with GSA order 2100.1 – IT Security Policy and GSA Order CIO P 2181 – HSPD-12 Personal Identity Verification and Credentialing Handbook. GSA separates the risk levels for personnel working on Federal computer systems into three categories: Low Risk, Moderate Risk, and High Risk.

1. Those contract personnel (hereafter known as “Applicant”) determined to be in a Low Risk position will require a National Agency Check with Written Inquiries (NACI) investigation.
2. Those applicants determined to be in a Moderate Risk position will require either a Limited Background Investigation (LBI) or a Minimum Background Investigation (MBI) based on the FEDSIM CO’s determination.

3. Those Applicants determined to be in a High Risk position will require a Background Investigation (BI).

The FEDSIM CO, through the FEDSIM COR or TPOC will ensure that a completed Contractor Information Worksheet (CIW) for each applicant is forwarded to the Federal Protective Service (FPS) in accordance with the GSA/FPS Contractor Suitability and Adjudication Program Implementation Plan dated 20 February 2007. FPS will then contact each applicant with instructions for completing required forms and releases for the particular type of personnel investigation requested.

Applicants will not be reinvestigated if a prior favorable adjudication is on file with FPS or GSA, there has been less than a one-year break in service, and the position is identified at the same or lower risk level.

Once a favorable FBI Criminal History Check (Fingerprint Check) has been returned, applicants may receive a GSA identity credential (if required) and initial access to GSA information systems. The HSPD-12 Handbook contains procedures for obtaining identity credentials and access to GSA information systems as well as procedures to be followed in case of unfavorable adjudications.

7.3.2 SENSITIVE INFORMATION STORAGE

SBU information, data, and/or equipment shall only be disclosed to authorized personnel on a Need-To-Know basis. The contractor shall ensure that appropriate administrative, technical, and physical safeguards are established to ensure the security and confidentiality of this information, data, and/or equipment is properly protected. When no longer required, this information, data, and/or equipment shall be returned to Government control, destroyed, or held until otherwise directed. Destruction of items shall be accomplished by tearing into small parts, burning, shredding, or any other method that precludes the reconstruction of the material. All sensitive information contained on contractor computers shall be either degaussed or shall use the Department of Defense method of a three time overwrite of the sensitive data.

7.3.3 PROTECTION OF INFORMATION

The contractor shall be responsible for properly protecting all information used, gathered, disclosed, or developed as a result of work under this TO. The contractor shall also protect all Government data by treating information as sensitive. All information gathered or created under this TO shall be considered as SBU information. If contractor personnel must remove any information from the primary work area they should protect it to the same extent they would their proprietary data and/or company trade secrets. The use of this data is subject to the Privacy Act and shall be utilized in full accordance with all rules of conduct as applicable to Privacy Act Information.

7.3.4 REQUIRED POLICIES AND REGULATIONS

Contractors entering into an agreement for services to the GSA and/or its Federal customers shall be contractually subject to all GSA and Federal IT Security standards, policies, and reporting requirements. The contractor shall meet and comply with all GSA IT Security Policies and all applicable GSA and NIST standards and guidelines and other Government-wide laws and regulations for protection and security of IT.

All contractors must comply with the policies below (these documents are all referenced within the GSA IT Security Policy):

a. GSA Information Technology (IT) Security Policy (CIO 2100.1)

b. Homeland Security Presidential Directive-12 (HSPD- 12) Personal Identity Verification and Credentialing (GSA Order CIO 2181.1)

c. GSA Information Technology (IT) General Rules of Behavior (GSA Order CIO 2104.1A)

d. GSA Privacy Act Program (GSA Order CPO 1878.1)

e. GSA IT Security Procedural Guide: Contingency Planning (CIO IT Security 06-29)

f. GSA IT Security Procedural Guide: Managing Enterprise Risk (CIO IT Security 06-30)

g. GSA IT Security Procedural Guide: Plan of Action and Milestones (CIO IT Security 09-44)

h. GSA IT Security Procedural Guide: Continuous Monitoring Program (CIO IT Security 12-66)

Contractors are also required to comply with FIPS, the "Special Publications 800 series" guidelines published by NIST, and the requirements of FISMA outlined below:

a. Federal Information Security Modernization Act of 2014

b. Clinger-Cohen Act of 1996 also known as the "Information Technology Management Reform Act of 1996."

c. Privacy Act of 1974 (5 U.S.C. § 552a).

d. Homeland Security Presidential Directive (HSPD-12), "Policy for a Common Identification Standard for Federal Employees and Contractors"

e. Office of Management and Budget (OMB) Circular A-130, "Management of Federal Information Resources," and Appendix III, "Security of Federal Automated Information Systems", as amended.

f. OMB Memorandum M-04-04, "E-Authentication Guidance for Federal Agencies."

g. FIPS PUB 199, "Standards for Security Categorization of Federal Information and Information Systems."

h. FIPS PUB 200, "Minimum Security Requirements for Federal Information and Information Systems."

i. FIPS PUB 140-2, "Security Requirements for Cryptographic Modules."

j. NIST Special Publication 800-18, "Guide for Developing Security Plans for Federal Information Systems."

k. NIST Special Publication 800-30 Revision 1, "Guide for Conducting Risk Assessments."

l. NIST Special Publication 800-34 Revision 1, "Contingency Planning Guide for Information Technology Systems."

m. NIST Special Publication 800-37 Revision 1, "Guide for Applying the Risk Management Framework to Federal Information Systems: A Security Lifecycle Approach"

n. NIST Special Publication 800-47, "Security Guide for Interconnecting Information Technology Systems."

o. NIST Special Publication 800-53 Revision 4, "Security and Privacy Controls for Federal Information Systems and Organizations."

p. NIST Special Publication 800-53A Revision 4, "Assessing Security and Privacy Controls in Federal Information Systems and Organizations: Building Effective Assessment Plans."

7.3.4.1 SECURITY COMPLIANCE REQUIREMENTS

FIPS 200, "Minimum Security Requirements for Federal Information and Information Systems," is a mandatory Federal standard that defines the minimum security requirements for Federal information and information systems in 17 security-related areas. Contractor systems supporting GSA and its customers must meet the minimum security requirements through the use of the security controls in accordance with NIST Special Publication 800-53 Revision 4, and "Recommended Security Controls for Federal Information Systems."

To comply with the Federal standard, GSA must determine the security category of the information and information system in accordance with FIPS 199, "Standards for Security Categorization of Federal Information and Information Systems," and then the contractor shall apply the appropriately tailored set of Low, Moderate, or High impact baseline security controls in NIST 800-53, as determined by GSA.

NIST 800-53 controls requiring organization-defined parameters (i.e., password change frequency) shall be consistent with GSA specifications. The GSA-specified control parameters and supplemental guidance defining more specifically the requirements per FIPS 199 impact level are provided in Appendix A, of this document.

The contractor shall use GSA technical guidelines, NIST guidelines, Center for Internet Security (CIS) guidelines (Level 1), or industry best practice guidelines in hardening its systems.

7.3.4.2 ESSENTIAL SECURITY CONTROLS

All NIST 800-53 R4 controls must be implemented as per the applicable FIPS 199 Low, Moderate, or High baseline. The ensuing table identifies essential security controls from the respective baselines to highlight their importance and ensure they are implemented. The contractor shall make the proposed system and security architecture of the information system available to the Security Engineering Division, in the Office of the Chief Information Security Officer for review and approval before commencement of system build (architecture, infrastructure, and code).

Control ID	Control Title	Baseline	GSA Implementation Guidance
AC-2	Account Management	L, M, H	
AC17 (3)	Remote Access | Managed Access Control Points	M, H	The information system routes privileged authentication traffic to external hosted infrastructures / applications through GSAs managed network access control points to subject to the Trusted Internet Connections (TIC) and Einstein monitoring.
AU-2	Audit Events	L, M, H	Information systems shall implement audit configuration requirements including but not limited to: Successful and unsuccessful Account logon events, account management events, object access, policy change, privilege functions, process tracking, and system events. Web applications should log all admin activity, authentication checks, authorization checks, data deletions, data access, data changes, and permission changes. Web applications should log all admin activity, authentication checks, authorization checks, data deletions, data access, data changes, and permission changes.
CM-6	Configuration Settings	L, M, H	Information systems, including vendor owned / operated systems on behalf of GSA, shall configure their systems in agreement with GSA technical guidelines, NIST guidelines, Center for Internet Security guidelines (Level 1), or industry best practice guidelines, as deemed appropriate.
CP-7	Alternative Processing Site	M, H	FIPS 199 Moderate and High impact systems must implement processing across geographically-disparate locations to ensure fault tolerance. Amazon Web Services based architectures must implement a multi-region strategy (multiple availability zones in a single region are not sufficient).
CP-8	Telecom Services	M, H	FIP 199 Moderate and High impact information systems must implement alternate telecom services to support resumption when the primary telecommunications capabilities are unavailable at either the primary or alternate processing or storage sites.
IA-2	Identification and Authentication (Organizational Users)	L, M, H	Information systems with an e-authentication assurance level of 2 or above, used by federal employees or contractors must accept federal Personal Identity Verification (PIV) cards and verify them in accordance with guidance in OMB M-11-33.
IA-2 (1)	Identification and Authentication (Organizational Users) | Network Access to **Privileged Accounts**	L, M, H	All information systems shall implement multi-factor authentication for privileged accounts.

Control ID	Control Title	Baseline	GSA Implementation Guidance
IA-2 (2)	Identification and Authentication (Organizational Users) | Network Access to **Non-Privileged Accounts**	M, H	FIPS 199 Moderate and High impact information systems must implement multi-factor authentication for non-privileged accounts.
IA-2 (12)	Identification and Authentication | Acceptance of PIV Credentials	L, M, H	All information systems with an e-authentication assurance level of 2 or above, used by federal employees or contractors must accept federal Personal Identity Verification (PIV) cards and verify them in accordance with guidance in OMB M-11-33.
IA-7	Cryptographic Module Authentication	L, M, H	The information system shall implement FIPS 140-2 compliant encryption modules for authentication functions. Reference: http://csrc.nist.gov/groups/STM/cmvp/documents/140-1/1401vend.htm
MP-4	Media Storage	M, H	Digital media including magnetic tapes, external/removable hard drives, flash/thumb drives, diskettes, compact disks and digital video disks shall be encrypted using a FIPS 140-2 certified encryption module.
MP-5	Media Transport	M, H	Digital media including magnetic tapes, external/removable hard drives, flash/thumb drives and digital video disks shall be encrypted using a FIPS 140-2 certified encryption module during transport outside of controlled areas.
PL-8	Information Security Architecture	M, H	All information system security architectures must be formally reviewed and approved by the Office of the Chief Information Security Officer, Security Engineering Division during the system develop/design stages of the SDLC and prior to Security Assessment and Authorization in agreement with GSA IT Security Procedural 15-70, Security Engineering Framework.
RA-5	Vulnerability Scanning	L, M, H	All information system must complete quarterly OS, web, and database configuration scanning and provide results to the GSA together with POA&Ms.

Control ID	Control Title	Baseline	GSA Implementation Guidance
SC-8 / SC-8(1)	Transmission Confidentiality and Integration	M, H	Implemented encryption algorithms and cryptographic modules shall be FIPS-approved and FIPS 140-2 validated, respectively. o Digital signature encryption algorithms - Reference: (http://csrc.nist.gov/groups/ST/toolkit/digital_signatures.html#Approved o Block cypher encryption algorithms - Reference: http://csrc.nist.gov/groups/ST/toolkit/block_ciphers.html#Approved o Secure hashing algorithms – Reference: http://csrc.nist.gov/groups/ST/toolkit/secure_hashing.html#Approved SSL/TLS implementations shall align with GSA IT Security Procedural Guide 14-69, SSL/TLS Implementation. Systems shall be HTTPS only and implement HSTS.
SC-13	Cryptographic Protection | FIPS Validated Cryptography	L, M, H	Implemented encryption algorithms and cryptographic modules shall be FIPS-approved and FIPS 140-2 validated, respectively. o Digital signature encryption algorithms - Reference: (http://csrc.nist.gov/groups/ST/toolkit/digital_signatures.html#Approved o Block cypher encryption algorithms - Reference: http://csrc.nist.gov/groups/ST/toolkit/block_ciphers.html#Approved o Secure hashing algorithms – Reference: http://csrc.nist.gov/groups/ST/toolkit/secure_hashing.html#Approved
SC-17	PKI Certificates	M, H	Implement appropriate creation, use, and signing of crypto certs in agreement with GSA IT Security Procedural Guide 14-69, SSL/TLS Implementation, OMB Memorandum 05-24, and NIST Special Publications 800-32, NIST 800-63.
SC-18	Mobile Code	M, H	
SC-22	Architecture and Provisioning for Name / Address Resolution Service	L, M, H	Information systems shall be Domain Name System Security Extensions (DNSSEC) compliant as per OMB Memorandum, M-08-23, which requires all Federal Government departments and agencies that have registered and are operating second level .gov to be DNSSEC.

Control ID	Control Title	Baseline	GSA Implementation Guidance
SC-28 (1)	Protection of Information at Rest | Cryptographic Protection	GSA Required – For systems with Personally Identifiable Information Only	System bearing PII must implement protect information at rest. At a minimum, fields bearing PII data must be encrypted with field level encryption. Encryption algorithms shall be FIPS-approved; implemented encryption modules shall be FIPS 140-2 validated.
SI-2	Flaw Remediation	L, M, H	All projects and systems must be adequately tested for flaws; all Moderate, High, and Critical risk findings must be remediated prior to go-live. Post go-live, All critical and high vulnerabilities identified must be mitigated within 30 days and all moderate vulnerabilities mitigated within 90 days.
SI-3	Malicious Code Protection	L, M, H	
SI-4	Information System Monitoring	L, M, H	
SI-10	Information Input Validation	M, H	All system accepting input from end users must validate the input in accordance to industry best practices and published guidelines, including Web Application Security Guide: (CIO-IT Security-07-35) Rev. 2 - 01/16/2008, and OWASP Top 10 Web Application Security Vulnerabilities
SA-22	Unsupported System Components	GSA Required	All systems must be comprised of software and hardware components that are fully supported in terms of security patching for the anticipated life of the system.

7.4 ORGANIZATIONAL CONFLICT OF INTEREST AND NON-DISCLOSURE REQUIREMENTS

7.4.1 ORGANIZATIONAL CONFLICT OF INTEREST (OCI)

a. If a contractor is currently performing work, has been performed, or anticipates performing work that creates or represents an actual or potential OCI, the contractor shall immediately disclose this actual or potential OCI to GSA in accordance with FAR Subpart 9.5. The nature of the OCI may involve the prime contractor or subcontractors of any tier.

b. The contractor is required to complete and sign an OCI Statement (see Section 9 – List of Attachments. The contractor must represent either that (1) It is not aware of any facts which create any actual or potential OCI relating to the award of this contract, or (2) It has included information in its proposal, providing all current information bearing on the existence of any actual or potential OCI and has included a mitigation plan in accordance with paragraph (c) below.

c. If a contractor with an actual or potential OCI believes the conflict can be avoided, neutralized, or mitigated, the contractor shall submit a mitigation plan to the Government for review.
d. In addition to the mitigation plan, the FEDSIM CO may require further information from the contractor. The FEDSIM CO will use all information submitted by the contractor, and any other relevant information known to GSA, to determine whether an award to the contractor may take place, and whether the mitigation plan adequately avoids, neutralizes, or mitigates the OCI.
e. If any such conflict of interest is found to exist, the FEDSIM CO may determine that the conflict cannot be avoided, neutralized, mitigated or otherwise resolved to the satisfaction of the Government and the contractor may be found ineligible for award. Alternatively, the FEDSIM CO may determine that it is otherwise in the best interest of the United States to contract with the contractor and include the appropriate provisions to avoid neutralize, mitigate, or waive such conflict in the contract awarded.

7.4.2 NON-DISCLOSURE REQUIREMENTS

If the contractor acts on behalf of, or provides advice with respect to any phase of an agency procurement, as defined in FAR 3.104-4, then the contractor shall execute and submit a Corporate Non-Disclosure Agreement (NDA) Form (Section 9 – List of Attachments, Attachment H) and ensure that all its personnel (to include subcontractors and consultants) who will be personally and substantially involved in the performance of the TO:

a. Are listed on a signed Addendum to Corporate Non-Disclosure Agreement (NDA) Form (Section 9 – List of Attachments, Attachment H) prior to the commencement of any work on the TO.
b. Are instructed in the FAR 3.104 requirements for disclosure, protection, and marking of contractor bid or quote information, or source selection information.
c. Are instructed in FAR Part 9 for third-party disclosures when acting in an advisory capacity.

All proposed replacement contractor personnel also must be listed on a signed Addendum to Corporate NDA and be instructed in the requirements of FAR 3.104. Any information provided by contractors in the performance of this TO or obtained from the Government is only to be used in the performance of the TO. The contractor shall put in place appropriate procedures for the protection of such information and shall be liable to the Government for any misuse or unauthorized disclosure of such information by its personnel, as defined above.

7.5 SECTION 508 COMPLIANCE REQUIREMENTS

Unless the Government invokes an exemption, all Electronic and Information Technology (EIT) products and services provided shall fully comply with Section 508 of the Rehabilitation Act of 1973, per the 1998 Amendments, 29 United States Code (U.S.C.) 794d, and the Architectural and Transportation Barriers Compliance Board's Electronic and Information Technology Accessibility Standards at 36 Code of Federal Regulations (CFR) 1194. The contractor shall identify all EIT products and services provided, identify the technical standards applicable to all products and services proposed, and state the degree of compliance with the applicable standards (Section 9, Attachment I). Additionally, the contractor must clearly indicate where the

information pertaining to Section 508 compliance can be found (e.g., Vendor's or other exact web page location). The contractor must ensure that the list is easily accessible by typical users beginning at time of award.

7.6 PURCHASING SYSTEMS

The objective of a contractor purchasing system assessment is to evaluate the efficiency and effectiveness with which the contractor spends Government funds and complies with Government policy with subcontracting.

Prior to the award of a TO, the CO shall verify the validity of the contractor's purchasing system. Thereafter, the contractor is required to certify to the CO no later than 30 calendar days prior to the exercise of any options the validity of its purchasing system. Additionally, if reviews are conducted of the purchasing system after the exercise of the option, the contractor shall provide the results of the review to the CO within ten workdays from the date the results are known to the contractor.

7.7 TRAVEL

7.7.1 TRAVEL REGULATIONS

Contractor costs for travel will be reimbursed at the limits set in the following regulations (see FAR 31.205-46):

a. Federal Travel Regulations (FTR) - prescribed by the GSA, for travel in the contiguous U.S.
b. Joint Travel Regulations (JTR), Volume 2, Department of Defense (DoD) Civilian Personnel, Appendix A - prescribed by the DoD, for travel in Alaska, Hawaii, and outlying areas of the U.S.

7.7.2 TRAVEL AUTHORIZATION REQUESTS (TAR)

Before undertaking travel to any Government site or any other site in performance of this Contract, the contractor shall have this travel approved by, and coordinated with, the FEDSIM COR (Section 9, Attachment E). Notification shall include, at a minimum, the number of persons in the party, traveler name, destination, duration of stay, purpose, and estimated cost. Prior to any long-distance travel, the contractor shall prepare a Travel Authorization Request (TAR) for Government review and approval. Long-distance travel will be reimbursed for cost of travel comparable with the FTR.

Requests for travel approval shall:

a. Be prepared in a legible manner.
b. Include a description of the travel proposed including a statement as to purpose.
c. Be summarized by traveler.
d. Identify the TO number.
e. Identify the CLIN associated with the travel.
f. Be submitted in advance of the travel with sufficient time to permit review and approval.

The contractor shall use only the minimum number of travelers and rental cars needed to accomplish the task(s). Travel shall be scheduled during normal duty hours whenever possible.

7.8 ODCs

The Government may require the contractor to purchase hardware, software, and related supplies critical and related to the services being acquired under the TO. Such requirements will be identified at the time a RFQ is issued or may be identified during the course of a TO by the Government or the contractor. If the contractor initiates a purchase within the scope of this TO and the prime contractor has an approved purchasing system, the contractor shall submit to the FEDSIM COR a Request to Initiate Purchase (RIP) (Section 9, Attachment G). If the prime contractor does not have an approved purchasing system, the contractor shall submit to the FEDSIM CO a Consent to Purchase (CTP) (Section 9, Attachment F). The RIP and CTP shall include the purpose, specific items, estimated cost, cost comparison, and rationale. FAR 51 deviation allows for contractors to procure items (including IT equipment) from the GSA Schedule and GSA Global Supply Programs when deemed appropriate for fulfillment of agency requirements. Those items procured using the FAR 51 deviation must be T&M/LH. If FAR 51 deviation authority is used, the contractor shall submit an RIP, and the FEDSIM CO will issue written authorization to the contractor in accordance with FAR 51.102. The contractor shall not make any purchases without an approved RIP from the FEDSIM COR or an approved CTP from the FEDSIM CO and without complying with the requirements of Section 7.9, Commercial Supplier Agreements.

7.9 COMMERCIAL SUPPLIER AGREEMENTS

7.9.1 The Government understands that commercial software tools that may be purchased in furtherance of this TO may be subject to commercial agreements which may take a variety of forms, including without limitation licensing agreements, terms of service, maintenance agreements, and the like, whether existing in hard copy or in an electronic or online format such as "clickwrap" or "browsewrap" (collectively, "Supplier Agreements"). For purposes of this TO, the Supplier Agreements are “collateral agreements” within the meaning of the FAR clause at 52.227-14(c)(2).

7.9.2 The contractor shall ensure that any proposed Supplier Agreements allow the associated software and services to be used as necessary to achieve the objectives of this TO. The contractor shall provide all applicable Supplier Agreements to the FEDSIM CO prior to purchase and shall cooperate with the Government, including negotiations with the licensor as appropriate, to ensure compliance with this Section. Without limiting the generality of the foregoing, a compliant Supplier Agreement shall permit all of the following at no extra charge to the Government: (a) access and use by support contractors, including a successor contractor upon termination or expiration of this TO; (b) access by Federal, state and local law enforcement agencies; (c) transfer to a different data center and/or a successor contractor’s cloud; and (d) the creation of derivative works that shall be subject to at least the same rights as set forth in subparagraphs (a) through (c) above. The above rights constitute “other rights and limitations” as contemplated in subparagraph (d) of the FAR clause at 52.227-14, Rights In Data – General (May 2014), Alternate III (Dec 2007).

7.10 INTELLECTUAL PROPERTY RIGHTS

The existence of any patent, patent application or other intellectual property right that encumbers any deliverable must be disclosed in writing on the cover letter that accompanies the delivery. If no such disclosures are provided, the data rights provisions in FAR 52.227-14 apply. The Software Agreements referenced in Section 7.9, amended as contemplated therein, shall be deemed to constitute such disclosure with regard to their associated commercial software tools and shall prevail over any inconsistent provision in FAR 52.227-14 to the extent of such inconsistency.

7.11 ENERGY STAR AND FEMP-DESIGNATED ENERGY EFFICIENT PRODUCTS

The Energy Policy Act (EPAct) of 2005 requires Federal agencies to purchase Energy Star and Federal Energy Management Program (FEMP)-designated energy efficient products. The contractor shall provide products that earn the Energy Star and meet the Energy Star specifications for energy efficiency. The contractor is encouraged to visit energystar.gov for complete product specifications and updated lists of qualifying products.

Additionally, the Energy Independence and Security Act of 2007 (EISA) requires Federal agencies to purchase products that use low wattage during standby mode. The contractor shall use low wattage products wherever possible or as required under this TO.

The Electronic Product Environmental Assessment Tool (EPEAT) was created to define what it means for electronic products to be “environmentally preferable. The EPEAT standard has three tiers: Bronze, Silver, and Gold. Bronze means the product meets the mandatory criteria, Silver means the product meets the mandatory criteria plus 50 percent of the optional criteria, and Gold means the products meets the mandatory criteria plus 75 percent of the optional criteria. GSA’s policy is to purchase EPEAT-Silver products and encourages its contractors to do the same. The contractor shall ensure that for those products covered by an EPEAT standard, 95 percent of the products are EPEAT-registered.

7.12 NEWS RELEASE

The offeror shall not make any news release pertaining to this procurement without prior Government approval and only in coordination with the FEDSIM CO.

8.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This TO incorporates one or more clauses by reference with the same force and effect as if they were given in full text. Upon request the CO will make their full text available. Also, the full text of a provision may be accessed electronically at the FAR website:

http://www.acquisition.gov/far/

Clause No	Clause Title	Date
52.203-13	Contractor Code of Business Ethics and Conduct	(Oct 2015)
52.203-14	Display of Hotline Posters (fill in or provide link to client's posters)	(Oct 2015)
52.203-17	Contractor Employee Whistleblower Rights and Requirement to Inform Employees of Whistleblower Rights	(Apr 2014)
52.204-7 (Provision)	System for Award Management	(Jul 2013)
52.204-9	Personal Identity Verification of Contractor Personnel	(Jan 2011)
52.204.10	Reporting Executive Compensation and First Tier Subcontract Awards	(Oct 2015)
52.204-13	System for Award Management Maintenance	(Jul 2013)
52.204-14	Service Contract Reporting Requirements	(Jan 2014)
52.215-21	Requirements for Cost or Pricing Data or Information Other than Cost or Pricing Data – Modifications	(Oct 2010)
52.215-22	Limitations on Pass-Through Charges- Identification of Subcontractor Effort	(Oct 2009)
52.215-23	Limitations on Pass-Through Charges	(Oct 2009)
52.223-15	Energy Efficiency in Energy Consuming Products	(Dec 2007)
52.223-16	Acquisition of EPEAT®-Registered Personal Computer Products	(Oct 2015)
52.224-1	Privacy Act Notification	(Apr 1984)
52.224-2	Privacy Act	(Apr 1984)
52.225-13	Restrictions on Certain Foreign Purchases	(Jun 2008)
52.227-14	Rights in Data – General	(Dec 2007)
52.227-14	Rights In Data – General Alternate II or III	(May 2014)
52.227-15	Representation of Limited Rights Data and Restricted Computer Software	(Dec 2007)
52.232-18	Availability of Funds	(Apr 1984)
52.232-20	Limitation of Cost	(Apr 1984)

Clause No	Clause Title	Date
52.232-22	Limitation of Funds	(Apr 1984)
52.239-1	Privacy or Security Safeguards	(Aug 1996)
52.244-6	Subcontracts for Commercial Items	(Jun 2016)
52.246-25	Limitation of Liability – Services	(Feb 1997)
52.247-67	Submission of Transportation Documents for Audit see Section G	(Feb 2006)
52.249-14	Excusable Delays	(Apr 1984)
52.251-1	Government Supply Sources	(Apr 2012)

8.1.1 CLAUSES INCORPORATED BY FULL TEXT

52.217-8 OPTION TO EXTEND SERVICES (NOV 1999)

The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed 6 months. The Contracting Officer may exercise the option by written notice to the Contractor within **30 days** of the end of the period of performance.

(End of clause)

52.217-9 OPTION TO EXTEND THE TERM OF THE CONTRACT (MAR 2000)

a. The Government may extend the term of this contract by written notice to the Contractor within **30 days;** provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least **60 days** before the contract expires. The preliminary notice does not commit the Government to an extension.
b. If the Government exercises this option, the extended contract shall be considered to include this option clause.
c. The total duration of this contract, including the exercise of any options under this clause, shall not exceed **126 months**.

(End of clause)

8.2 GENERAL SERVICES ADMINISTRATION ACQUISITION MANUAL (GSAM) CLAUSES INCORPORATED BY REFERENCE

The full text of a provision may be accessed electronically at the GSAM website:

https://www.acquisition.gov/gsam/gsam.html

Clause No	Clause Title	Date
552.204-9	Personal Identity Verification Requirements	(Oct 2012)
552.232.25	Prompt Payment	(Nov 2009)

Clause No	Clause Title	Date
552.239-70	Information Technology Security Plan and Security Authorization	(Jun 2011)
552.239-71	Security Requirements for Unclassified Information Technology Resources	(Jan 2012)

9.1 LIST OF ATTACHMENTS

The following attachments are attached, either in full text or electronically at the end of the RFQ.

Attachment	Title
A	COR Appointment Letter (electronically attached .doc)
B	Acronym List
C	Monthly Status Report
D	Problem Notification Report
E	Travel Authorization Template (electronically attached .xls)
F	Consent to Purchase Template (electronically attached .xls)
G	Request to Initiate Purchase Template (electronically attached .xls)
H	Corporate Non-Disclosure Agreement
I	Section 508 Product Accessibility Report
J	Deliverable Acceptance-Rejection Report
K	Current Customer List and Employee Counts
L	HR and T&A System Requirements – (electronically attached .xls)
M	Additional Entity Specific System Requirements - (electronically attached .xls)
N	Performance Measures
O	Interface Requirements - HRT2T-HHS FOH ICD (electronically attached .doc)
P	Interface Requirements – HRT2T-LMS ICD (electronically attached .doc)
Q	Interface Requirements – HRT2T-NCUA ICD (electronically attached .doc)
R	Interface Requirements – HRT2T-NSA ICD (electronically attached .doc)
S	Interface Requirements – HRT2T-OPM OLU ICD (electronically attached .doc)
T	Interface Requirements – HRT2T-PAR ICD (electronically attached .doc)
U	Incremental Funding Chart (electronically attached .xls) (Attached at award)
V	Offeror Q&A Template (To be removed at time of award)
W	Project Staffing Plan Template (To be removed at time of award)
X	Key Personnel Qualification Matrix (To be removed at time of award)
Y	Corporate Experience Template (To be removed at award)
Z	Pricing Workbook (To be removed at award) (electronically attached .xls)
AA	QASP
BB	Interface Requirements – GCIMS ICD (electronically attached .doc)

ATTACHMENT A

COR APPOINTMENT LETTER

(Electronically Attached .doc)

Acronym List

ADP	Automated Data Processing
ALOHA	Authorized Leave and Overtime Help Application
AO	Authorizing Official
ATO	Authority To Operate
BI	Background Investigation
BRM	Business Reference Model
C&A	Certification and Accreditation
CABS	Commissions and Boards
CCB	Change Control Board
CFR	Code of Federal Regulations
CHCO	Chief Human Capital Officers
CIO	Chief Information Officer
CIW	Contractor Information Worksheet
CLIN	Contract Line Item Number
CO	Contracting Officer
CONOPS	Concept of Operations
COOP	Continuity of Operations Plan
COR	Contracting Officer's Representative
COTS	Commercial Off-The-Shelf
CHRIS	Comprehensive Human Resources Integrated System
CIO	Chief Information Officer
CISO	Chief Information Security Officer
CPC	Consolidated Processing Center
CPDF	Central Personnel Data File
CSCA	Contractor Security Control Assessment
CTP	Consent to Purchase
DBMS	Database Management System
DISCO	Defense Industrial Security Clearance Organization
DNSSEC	Domain Name System Security Extensions
eGOV	e-Government
EIT	Electronic and Information Technology
EHRI	Enterprise Human Resources Integration
ETAMS	Electronic Time and Attendance System
FAQs	Frequently Asked Questions
FAR	Federal Acquisition Regulation
FDCC	Federal Desktop Core Configuration
FEA	Federal Enterprise Architecture
FEDSIM	Federal Systems Integration and Management Center

FFP	Firm-Fixed-Price
FIPS	Federal Information Processing Standards
FISMA	Federal Information Security Act
FFP	Firm Fixed Price
FOIA	Freedom of Information Act
FPS	Federal Protective Service
FTR	Federal Travel Regulation
GAO	Government Accountability Office
GFE	Government-Furnished Equipment
GFI	Government-Furnished Information
GSA	General Services Administration
GSAM	General Services Administration Acquisition Manual
GSAR	General Services Administration Regulation
GPPA	Guide to Processing Personnel Actions
GSA PM	GSA Project Manager
HIPAA	Health Insurance Portability and Accountability Act
HR	Human Resources
HR LOB	Human Resources Line of Business
HRIS	Human Resources Information System
HR IT	Human Resources Information Technology
IBF	Financial Administrative Systems Division
IMP	Integrated Master Plan
IMS	Integrated Master Schedule
IOT&E	Independent Operational Test & Evaluation
IPT	Integrated Project Team
ISA	Interconnection Security Agreement
ISSM	Information System Security Manager
ISO	Information Security Officer
IT	Information Technology
ITIL	Information Technology Infrastructure Library
IV&V	Independent Verification and Validation
JFMIP	Joint Financial Management Improvement Program
JTR	Joint Travel Regulation
LBI	Limited Background Investigation
LDS	Labor Distribution System
MBI	Moderate Background Investigation
MOA	Memorandum of Agreement
MOU	Memorandum of Understanding
MS	Microsoft
MSR	Monthly Status Report

NARA	National Archives and Records Administration
NACI	National Agency Check with Written Inquiries
NCUA	National Credit Union Administration
NDA	Non-Disclosure Agreement
NIST	National Institute Standards and Technology
NLT	No Later Than
NFR	Notice of Findings and Recommendations
NOAC	Nature of Action Code
NTE	Not-to-Exceed
NSOC	National Security Operations Center
NTE	Not to Exceed
OCI	Organizational Conflict of Interest
ODC	Other Direct Cost
OE	Other Equipment
OFHR	Oracle Federal Human Resources
OHRM	Office Of Human Resource Management
OMB	U.S. Office of Management and Budget
OPF	Official Personnel Folders
OPM	Office of Personnel Management
OS	Operating System
PAR	Payroll Accounting and Reporting
PDF	Portable Document Format
PIA	Privacy Impact Assessment
PII	Personal Identifiable Data
PIV	Personal Identity Verification
PM	Program Manager
PMA	President's Management Agenda
PMP	Program Management Plan
PNR	Problem Notification Report
POA&M	Plan of Action and Milestones
POC	Point of Contact
PWS	Performance Work Statement
Q&A	Question and Answer
QA	Quality Assurance
QASP	Quality Assurance Surveillance Plan
QCP	Quality Control Plan
RFQ	Request For Quote
RIP	Request to Initiate Purchase
RRB	Railroad Retirement Board
RSD	Requirements Specification Document
RTM	Requirements Traceability Matrix

SBU	Sensitive But Unclassified
SDD	System Design Document
SIC	Security and Investigation Center
SLA	Service Level Agreement
SORN	System of Record Notice
SOP	Standard Operating Procedures
SP	Special Publications
SSC	Shared Service Center
SSP	System Security Plan
T&A	Time and Attendance
T&M	Time and Materials
TBD	To Be Determined
TEB	Technical Evaluation Board
TIC	Trusted Internet Connections
TOA	Task Order Award
TPOC	Technical Point of Contact
USC	United States Code
USIP	United States Institute of Peace
VLTP	Voluntary Leave Transfer Program
VPN	Virtual Private Network
WBS	Work Breakdown Structure
WEBPACC	Web Payroll Accounting Code Changes

ATTACHMENT C

MONTHLY STATUS REPORT FOR (MONTH AND YEAR)

Contractor Name
Task Order Number: XXXXXXX
Prepared by: **XXXXXXX**
Reporting Period: XXXXXXX
Page 1 of **X**

a. **Activities during reporting period, by task** (*Start with a brief description of the task*).

- On-going activities:
- New activities:
- Activities completed:
- Progress to date on all above mentioned activities:

b. **Problems and corrective actions taken** (*Identify issues or concerns and proposed resolutions to address them*).

c. **Personnel gains, losses, and status** (*security clearance, etc*.).

d. **Government actions required**.

e. **Schedule** (*Show major tasks, milestones, and deliverables; planned and actual start and completion dates for each*).

f. **Summary of trips taken, conferences attended, etc.** (A*ttach trip reports to this MSR for reporting period*).

g. **Accumulated invoiced cost for each CLIN up to the previous month**.

h. **Projected cost of each CLIN for the current month**.

i. Contractor Risks and Issues related to managing the contract.

ATTACHMENT D

PROBLEM NOTIFICATION REPORT

TASK ORDER NUMBER: _____ DATE: _____

1. Nature and sources of problem:

2. COR was verbally notified on: (date) _____

3. Is action required by the Government? Yes_____ No_____

4. If YES, describe Government action required and date required:

5. Will problem impact delivery schedule? Yes_____ No_____

6. If YES, identify what deliverables will be affected and extent of delay:

7. Can required delivery be brought back on schedule? Yes_____ No_____

8. Describe corrective action needed to resolve problems:

9. When will corrective action be completed?

10. Are increased costs anticipated? Yes_____ No_____

11. Identify amount of increased costs anticipated, their nature, and define Government responsibility for problems and costs:

ATTACHMENT E

TRAVEL AUTHORIZATION TEMPLATE

(Electronically attached .xls)

ATTACHMENT F

CONSENT TO PURCHASE TEMPLATE

(Electronically attached .xls)

ATTACHMENT G

REQUEST TO INITIATE PURCHASE TEMPLATE

(Electronically attached .xls)

NON-DISCLOSURE AGREEMENT
BETWEEN
U.S. GENERAL SERVICES ADMINISTRATION (GSA)
FEDERAL SYSTEMS INTEGRATION AND MANAGEMENT CENTER (FEDSIM)
AND
[CONTRACTOR]

This agreement, made and entered into this _____ day of _____, 2016 (the "Effective Date"), is by and between GSA and [CONTRACTOR].

WHEREAS, [CONTRACTOR] and GSA FEDSIM have entered into [Contract No.], Task Order No. [INSERT] for services supporting the [CLIENT AGENCY AND PROGRAM/PROJECT NAME];

WHEREAS, [CONTRACTOR] is providing [DESCRIPTION, e.g., consulting/professional IT, engineering] services under the Task Order;

WHEREAS, the services required to support [PROGRAM/PROJECT NAME] involve certain information which the Government considers to be "Confidential Information"[1] as defined herein;

WHEREAS, GSA desires to have [CONTRACTOR]'s support to accomplish the Task Order services and, therefore, must grant access to the Confidential Information;

WHEREAS, [CONTRACTOR] through its work at a Government site may have access to Government systems or encounter information unrelated to performance of the Task Order which also is considered to be Confidential Information as defined herein;

WHEREAS, GSA on behalf of [CLIENT AGENCY] desires to protect the confidentiality and use of such Confidential Information;

NOW, THEREFORE, for and in consideration of the mutual promises contained herein, the parties agree as follows:

1. **Definitions.** "Confidential Information" shall mean any of the following: (1) "contractor bid or proposal information" and "source selection information" as those terms are defined in 41 U.S.C. § 2101; (2) the trade secrets or proprietary information of other companies; (3) other information, whether owned or developed by the Government, that has not been previously made available to the public, such as the requirements, funding or budgeting data of the Government; and *for contracts/orders providing acquisition assistance,* this term specifically includes (4) past performance information, actual/proposed costs, overhead rates, profit, award fee determinations, contractor employee data of offerors/contractors, methods or

[1] This does not denote an official security classification.

procedures used to evaluate performance, assessments, ratings or deliberations developed in an evaluation process, the substance of any discussions or deliberations in an evaluation process, and any recommendations or decisions of the Government unless and until such decisions are publicly announced. This term is limited to unclassified information.

2. **Limitations on Disclosure.** [CONTRACTOR] agrees (and the [CONTRACTOR] Task Order personnel must agree by separate written agreement with CONTRACTOR) not to distribute, disclose or disseminate Confidential Information to anyone beyond the personnel identified in the [ATTACHED ADDENDUM], unless authorized in advance by the GSA Contracting Officer in writing. The Contracting Officer and [CLIENT POC] will review the Addendum to ensure it includes only those individuals to be allowed access to the information. The Addendum, which may be updated from time to time, is approved when signed by the GSA Contracting Officer and [CLIENT POC].

3. **Agreements with Employees and Subcontractors.** [CONTRACTOR] will require its employees and any subcontractors or subcontractor employees performing services for this Task Order to sign non-disclosure agreements obligating each employee/subcontractor employee to comply with the terms of this agreement. [CONTRACTOR] shall maintain copies of each agreement on file and furnish them to the Government upon request.

4. **Statutory Restrictions Relating to Procurement Information.** [CONTRACTOR] acknowledges that certain Confidential Information may be subject to restrictions in Section 27 of the Office of Federal Procurement Policy Act (41 U.S.C. § 2104), as amended, and disclosures may result in criminal, civil, and/or administrative penalties. In addition, [CONTRACTOR] acknowledges that 18 U.S.C. § 1905, a criminal statute, bars an employee of a private sector organization from divulging certain confidential business information unless authorized by law.

5. **Limitations on Use of Confidential Information.** [CONTRACTOR] may obtain Confidential Information through performance of the Task Order orally or in writing. These disclosures or this access to information is being made upon the basis of the confidential relationship between the parties and, unless specifically authorized in accordance with this agreement, [CONTRACTOR] will:

   a) Use such Confidential Information for the sole purpose of performing the [PROGRAM/PROJECT] support requirements detailed in the Task Order and for no other purpose;

   b) Not make any copies of Confidential Information, in whole or in part;

   c) Promptly notify GSA in writing of any unauthorized misappropriation, disclosure, or use by any person of the Confidential Information which may come to its attention and take

all steps reasonably necessary to limit, stop or otherwise remedy such misappropriation, disclosure, or use caused or permitted by a [CONTRACTOR] employee.

6. **Duties Respecting Third Parties.** If [CONTRACTOR] will have access to the proprietary information of other companies in performing Task Order support services for the Government, [CONTRACTOR] shall enter into agreements with the other companies to protect their information from unauthorized use or disclosure for as long as it remains proprietary and refrain from using the information for any purpose other than that for which it was furnished. [CONTRACTOR] agrees to maintain copies of these third party agreements and furnish them to the Government upon request in accordance with 48 C.F.R. § 9.505-4(b).

7. **Notice Concerning Organizational Conflicts of Interest.** [CONTRACTOR] agrees that distribution, disclosure or dissemination of Confidential Information (whether authorized or unauthorized) within its corporate organization or affiliates, may lead to disqualification from participation in future Government procurements under the organizational conflict of interest rules of 48 C.F.R. § 9.5.

8. **Entire Agreement.** This Agreement constitutes the entire agreement between the parties and supersedes any prior or contemporaneous oral or written representations with regard to protection of Confidential Information in performance of the subject Task Order. This Agreement may not be modified except in writing signed by both parties.

9. **Governing Law**. The laws of the United States shall govern this agreement.

10. **Severability.** If any provision of this Agreement is invalid or unenforceable under the applicable law, the remaining provisions shall remain in effect.

In accordance with Public Law No. 108-447, Consolidated Act, 2005, the following is applicable:

> These restrictions are consistent with and do not supersede, conflict with, or otherwise alter the employee obligations, rights, or liabilities created by Executive Order No. 12958; section 7211 of title 5, United States Code (governing disclosures to Congress); section 1034 of title 10, United States Code, as amended by the Military Whistleblower Protection Act (governing disclosure to Congress by members of the military); section 2302(b)(8) of title 5, United States Code, as amended by the Whistleblower Protection Act (governing disclosures of illegality, waste, fraud, abuse or public health or safety threats); the Intelligence Identities Protection Act of 1982 (50 U.S.C. 421 et seq.) (governing disclosures that could expose confidential Government agents); and the statutes which protect against disclosure that may compromise the national security, including sections 641, 793, 794, 798, and 952 of title 18, United States Code, and section 4(b) of the Subversive Activities Act of 1950 (50 U.S.C. 783(b)). The definitions, requirements, obligations, rights, sanctions, and liabilities created by said Executive order and listed statutes are incorporated into this agreement and are controlling.

11. Beneficiaries. If information owned by an individual or entity not a party to this agreement is disclosed or misappropriated by [CONTRACTOR] in breach of this agreement, such information owner is a third party beneficiary of this agreement. However, nothing herein shall create an independent right of action against the U.S. Government by any third party.

IN WITNESS WHEREOF, GSA and [CONTRACTOR] have caused the Agreement to be executed as of the day and year first written above.

UNITED STATES GENERAL SERVICES ADMINISTRATION

_____ _____
Name Date

_____
Contracting Officer

[CONTRACTOR]

_____ _____
Name* Date

_____
Title

*Person must have the authority to bind the company.

ATTACHMENT I

SECTION 508 COMPLIANCE

Product Accessibility Template **Contact for more Information:_____** **Date:_____**		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
Section 1194.21 Software Applications and Operating Systems		
Section 1194.22 Web-based internet information and applications		
Section 1194.23 Telecommunications Products		
Section 1194.24 Video and multi-media products		
Section 1194.25 Self-contained Products		
Section 1194.26 Desktop and Portable Computers		
Section 1194.31 Functional Performance Criteria		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) When software is designed to run on a system that has a keyboard, product functions shall be executable from a keyboard where the function itself or the result of performing a function can be discerned textually.		
(b) Applications shall not disrupt or disable activated features of other products that are identified as accessibility features, where those features are developed and documented according to industry standards. Applications also shall not disrupt or disable activated features of any operating system that are identified as accessibility features where the application programming interface for those accessibility features has been documented by the manufacturer of the operating system and is available to the product developer.		
(c) A well defined on-screen indication of the current focus shall be provided that moves among interactive interface elements as the input focus changes. The focus shall be programmatically exposed so that Assistive Technology can track focus and focus changes.		
(d) Sufficient information about a user interface element including the identity, operation and state of the element shall be available to Assistive Technology. When an image represents a program element, the information conveyed by the image must also be available in text.		
(e) When bitmap images are used to identify controls, status indicators, or other programmatic elements, the meaning assigned to those images shall be consistent throughout an application's performance.		
(f) Textual information shall be provided through operating system functions for displaying text. The minimum information that shall be made available is text content, text input caret location, and text attributes.		
(g) Applications shall not override user-selected contrast and color selections and other individual display attributes.		
(h) When animation is displayed, the information shall be displayable in at least one non-animated presentation mode at the option of the user.		
(i) Color-coding shall not be used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.		
(j) When a product permits a user to adjust color and contrast settings, a variety of color selections capable of producing a range of contrast levels shall be provided.		
(k) Software shall not use flashing or blinking text, objects, or other elements		

having a flash or blink frequency greater than 2 Hz and lower than 55 Hz.		
(l) When electronic forms are used, the form shall allow people using Assistive Technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) A text equivalent for every non-text element shall be provided (e.g., via "alt", "longdesc", or in element content).		
(b) Equivalent alternatives for any multimedia presentation shall be synchronized with the presentation.		
(c) Web pages shall be designed so that all information conveyed with color is also available without color, for example from context or markup.		
(d) Documents shall be organized so they are readable without requiring an associated style sheet.		
(e) Redundant text links shall be provided for each active region of a server-side image map.		
(f) Client-side image maps shall be provided instead of server-side image maps except where the regions cannot be defined with an available geometric shape.		
(g) Row and column headers shall be identified for data tables.		
(h) Markup shall be used to associate data cells and header cells for data tables that have two or more logical levels of row or column headers.		
(i) Frames shall be titled with text that facilitates frame identification and navigation		
(j) Pages shall be designed to avoid causing the screen to flicker with a frequency greater than 2 Hz and lower than 55 Hz.		
(k) A text-only page, with equivalent information or functionality, shall be provided to make a web site comply with the provisions of this part, when compliance cannot be accomplished in any other way. The content of the text-only page shall be updated whenever the primary page changes.		
(l) When pages use scripting languages to display content, or to create interface elements, the information provided by the script shall be identified with functional text that can be read by Assistive Technology.		
(m) When a web page requires that an applet, plug-in or other application be present on the client system to interpret page content, the page must provide a link to a plug-in or applet that complies with §1194.21(a) through (l).		
(n) When electronic forms are designed to be completed on-line, the form shall allow people using Assistive Technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.		
(o) A method shall be provided that permits users to skip repetitive navigation links.		
(p) When a timed response is required, the user shall be alerted and given sufficient time to indicate more time is required.		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) Telecommunications products or systems which provide a function allowing voice communication and which do not themselves provide a TTY functionality shall provide a standard non-acoustic connection point for TTYs. Microphones shall be capable of being turned on and off to allow the user to intermix speech with TTY use.		

(b) Telecommunications products which include voice communication functionality shall support all commonly used cross-manufacturer non-proprietary standard TTY signal protocols.		
(c) Voice mail, auto-attendant, and interactive voice response telecommunications systems shall be usable by TTY users with their TTYs.		
(d) Voice mail, messaging, auto-attendant, and interactive voice response telecommunications systems that require a response from a user within a time interval, shall give an alert when the time interval is about to run out, and shall provide sufficient time for the user to indicate more time is required.		
(e) Where provided, caller identification and similar telecommunications functions shall also be available for users of TTYs, and for users who cannot see displays.		
(f) For transmitted voice signals, telecommunications products shall provide a gain adjustable up to a minimum of 20 dB. For incremental volume control, at least one intermediate step of 12 dB of gain shall be provided.		
(g) If the telecommunications product allows a user to adjust the receive volume, a function shall be provided to automatically reset the volume to the default level after every use.		
(h) Where a telecommunications product delivers output by an audio transducer which is normally held up to the ear, a means for effective magnetic wireless coupling to hearing technologies shall be provided.		
(i) Interference to hearing technologies (including hearing aids, cochlear implants, and assistive listening devices) shall be reduced to the lowest possible level that allows a user of hearing technologies to use the telecommunications product.		
(j) Products that transmit or conduct information or communication, shall pass through cross-manufacturer, non-proprietary, industry-standard codes, translation protocols, formats or other information necessary to provide the information or communication in a usable format. Technologies, which use encoding, signal compression, format transformation, or similar techniques shall not remove information needed for access or shall restore it upon delivery.		
(k)(1) Products which have mechanically operated controls or keys shall comply with the following: Controls and Keys shall be tactilely discernible without activating the controls or keys.		
(k)(2) Products which have mechanically operated controls or keys shall comply with the following: Controls and Keys shall be operable with one hand and shall not require tight grasping, pinching, twisting of the wrist. The force required to activate controls and keys shall be 5 lbs. (22.2N) maximum.		
(k)(3) Products which have mechanically operated controls or keys shall comply with the following: If key repeat is supported, the delay before repeat shall be adjustable to at least 2 seconds. Key repeat rate shall be adjustable to 2 seconds per character.		
(k)(4) Products which have mechanically operated controls or keys shall comply with the following: The status of all locking or toggle controls or keys shall be visually discernible, and discernible either through touch or sound.		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
a) All analog television displays 13 inches and larger, and computer equipment that includes analog television receiver or display circuitry, shall be equipped with caption decoder circuitry which appropriately receives, decodes, and displays closed captions from broadcast, cable, videotape, and		

DVD signals. As soon as practicable, but not later than July 1, 2002, widescreen digital television (DTV) displays measuring at least 7.8 inches vertically, DTV sets with conventional displays measuring at least 13 inches vertically, and stand-alone DTV tuners, whether or not they are marketed with display screens, and computer equipment that includes DTV receiver or display circuitry, shall be equipped with caption decoder circuitry which appropriately receives, decodes, and displays closed captions from broadcast, cable, videotape, and DVD signals.		
(b) Television tuners, including tuner cards for use in computers, shall be equipped with secondary audio program playback circuitry.		
(c) All training and informational video and multimedia productions which support the agency's mission, regardless of format, that contain speech or other audio information necessary for the comprehension of the content, shall be open or closed captioned.		
(d) All training and informational video and multimedia productions which support the agency's mission, regardless of format, that contain visual information necessary for the comprehension of the content, shall be audio described.		
(e) Display or presentation of alternate text presentation or audio descriptions shall be user-selectable unless permanent.		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) Self-contained products shall be usable by people with disabilities without requiring an end-user to attach Assistive Technology to the product. Personal headsets for private listening are not Assistive Technology.		
(b) When a timed response is required, the user shall be alerted and given sufficient time to indicate more time is required.		
(c) Where a product uses touch screens or contact-sensitive controls, an input method shall be provided that complies with §1194.23 (k) (1) through (4).		
(d) When biometric forms of user identification or control are used, an alternative form of identification or activation, which does not require the user to possess particular biological characteristics, shall also be provided.		
(e) When products provide auditory output, the audio signal shall be provided at a standard signal level through an industry standard connector that will allow for private listening. The product must provide the ability to interrupt, pause, and restart the audio at anytime.		
(f) When products deliver voice output in a public area, incremental volume control shall be provided with output amplification up to a level of at least 65 dB. Where the ambient noise level of the environment is above 45 dB, a volume gain of at least 20 dB above the ambient level shall be user selectable. A function shall be provided to automatically reset the volume to the default level after every use.		
(g) Color-coding shall not be used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.		
(h) When a product permits a user to adjust color and contrast settings, a range of color selections capable of producing a variety of contrast levels shall be provided.		
(i) Products shall be designed to avoid causing the screen to flicker with a frequency greater than 2 Hz and lower than 55 Hz.		
(j) (1) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: The position of any operable control shall be determined with		

respect to a vertical plane, which is 48 inches in length, centered on the operable control, and at the maximum protrusion of the product within the 48 inch length on products which are freestanding, non-portable, and intended to be used in one location and which have operable controls.		
(j)(2) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: Where any operable control is 10 inches or less behind the reference plane, the height shall be 54 inches maximum and 15 inches minimum above the floor.		
(j)(3) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: Where any operable control is more than 10 inches and not more than 24 inches behind the reference plane, the height shall be 46 inches maximum and 15 inches minimum above the floor.		
(j)(4) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: Operable controls shall not be more than 24 inches behind the reference plane.		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) All mechanically operated controls and keys shall comply with §1194.23 (k) (1) through (4).		
(b) If a product uses touch screens or touch-operated controls, an input method shall be provided that complies with §1194.23 (k) (1) through (4).		
(c) When biometric forms of user identification or control are used, an alternative form of identification or activation, which does not require the user to possess particular biological characteristics, shall also be provided.		
(d) Where provided, at least one of each type of expansion slots, ports and connectors shall comply with publicly available industry standards		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) At least one mode of operation and information retrieval that does not require user vision shall be provided, or support for Assistive Technology used by people who are blind or visually impaired shall be provided.		
(b) At least one mode of operation and information retrieval that does not require visual acuity greater than 20/70 shall be provided in audio and enlarged print output working together or independently, or support for Assistive Technology used by people who are visually impaired shall be provided.		
(c) At least one mode of operation and information retrieval that does not require user hearing shall be provided, or support for Assistive Technology used by people who are deaf or hard of hearing shall be provided		
(d) Where audio information is important for the use of a product, at least one mode of operation and information retrieval shall be provided in an enhanced auditory fashion, or support for assistive hearing devices shall be provided.		
(e) At least one mode of operation and information retrieval that does not require user speech shall be provided, or support for Assistive Technology used by people with disabilities shall be provided.		
(f) At least one mode of operation and information retrieval that does not require fine motor control or simultaneous actions and that is operable with limited reach and strength shall be provided.		

ATTACHMENT J

DELIVERABLE ACCEPTANCE/REJECTION FORM

Dear (insert name of TPOC)

Please review the deliverable identified below, sign and date, and provide any comments either in the space provided or on an attached form. Comments are due by **XX/XX/20XX**.

DELIVERABLE NAME:
AGENCY NAME:
PROJECT NAME:
FEDSIM TASK ORDER/CONTRACT NUMBER:
FEDSIM PROJECT NUMBER:
DELIVERABLE DUE DATE:

I have reviewed the aforementioned document and have:
☐ Accepted it without comments
☐ Accepted it with comments
☐ Rejected it with comments

COMMENTS:

_____ _____
(name) (date)
(title)

NUMBER OF CURRENT CUSTOMERS & EMPLOYEE COUNTS - HR AND PAYROLL SYSTEMS Updated July 5, 2016		
Customer	**Payroll**	**HR**
AGENCIES THAT CAN SELECT ANY SERVICE PROVIDER		
U.S. General Services Administration	**11,206**	**11,206**

CABS THAT MUST BE SUPPORTED BY GSA BY LEGISLATIVE MANDATE		
U.S. AbilityOne Commission (Executive)	29	29
U.S. Election Assistance Commission (Executive)	28	28
National Council on Disability (Executive)	25	25
Marine Mammal Commission (Executive)	23	23
Nuclear Waste Technical Review Board (Executive)	23	23
U.S. Commission on International Religious Freedom (Legislative)	27	27
U.S. Commission for the Preservation of America's Heritage Abroad (Executive)	1	0
World War I Centennial Commission	5	5
SUB-TOTAL	**161**	**160**

ADDITIONAL CABS, AGENCIES, INDEPENDENT GOV'T CORPS CURRENTLY SUPPORTED BY GSA		
Office of Personnel Management (Executive)	5,974	5,974
U.S. Institute of Peace (Executive)	191	191
John F. Kennedy Center for the Performing Arts (Legislative)	43	43
State Justice Institute (Legislative)	2	0
National Credit Union Administration (Executive)	1,225	1,225
Railroad Retirement Board (Executive)	870	870
Medicare Payment Advisory Commission (Legislative)	48	48
Medicaid and CHIP Payment and Access Commission (Legislative)	44	44
Architect of the Capitol for Senate Restaurant Association (Non-Federal)	34	0
U.S. Institute for Environmental Conflict Resolution (Executive) (part of Udall Foundation)	25	0
U.S. China Economic Security Review Commission (Legislative)	27	27
U.S. Interagency Council on Homelessness (Executive)	19	19
Administrative Conference of the United States (Executive)	14	14
Morris K. Udall and Stewart L. Udall Foundation (Executive)	39	39
Appraisal Subcommittee of the Federal Financial Institutions	13	13
Japan-United States Friendship Commission (Executive)	13	13
Vietnam Education Foundation (Executive)	7	7
Dwight Eisenhower Memorial Commission (Legislative)	7	7

Council of the Inspectors General on Integrity & Efficiency (Executive)	9	9
John C. Stennis Center for Public Service (Legislative)	5	0
Delta Regional Authority (Legislative)	4	0
Privacy and Civil Liberties Oversight Board (Executive)	23	23
Barry M. Goldwater Scholarship & Excellence in Education Foundation (Executive)	7	7
Northern Border Regional Commission (Executive)	2	2
Former President Pensions	4	0
SUB-TOTAL	**8,649**	**8,575**
TOTAL GSA AND CUSTOMER AGENCIES AND CABS	**20,016**	**19,941**

ATTACHMENT L

HR and T&A System Requirements

(Electronically attached .xls)

ATTACHMENT M

ADDITIONAL ENTITY SPECIFIC SYSTEM REQUIREMENTS

(Electronically attached .xls)

ATTACHMENT O

PERFORMANCE REQUIREMENTS SUMMARY

The target column uses the following abbreviations:

- [G] = Green
- [Y] = Yellow
- [R] = Red

The ranges for each green, yellow, and red target are abbreviated for simplicity and space considerations (e.g., a metric may show [Y] is >= 95% which includes [G] which is >= 99%). Each range is understood to be mutually exclusive.

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Project Schedule Timeliness: Percentage of milestones completed at agreed-upon dates per project plan	(On time milestones / total milestones) * 100	Reflects the ability of the Provider and agency to work together to complete the project on time. Work that is yellow or red should have a corrective action plan in place to get deficient areas into green.	G 95% - 100% Y 90% - 94% R <= 90%	Monthly
Project Scope: Percentage of approved change requests resolved within approved level of effort estimate	(# CRs where Actual Completion Date <= Estimated Completion date / Total # CRs) * 100	Change requests should be completed within the agreed upon completion time. Prior to execution, the impact and schedule of each CR is approved by the Customer / CCB	G 95% - 100% Y 90% - 94% R <= 90%	Monthly

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Project Risks: High project risks are reviewed at least bi-weekly	Number of risk review meetings held per month	Indicates that the project is actively reviewing risks to ensure that risk triggers have not occurred, or if a risk is triggered that the appropriate mitigation strategy is begun.	G >= 2 Y = 1 R = 0	Monthly
Project Risks: The percentage of risks that become issues	Number of high and medium risks that become an issue by the total number of high and medium risks multiplied by 100 (#High/Medium Risks that become issues / Total # of High/Medium Risks) * 100	Indicator of risks being actively managed and issues being avoided	G < 2% Y 3% - 10% R > 10%	Monthly
Project Issues: The percentage of issues resolved within planned timeframes NOTE – project issues such as actions or risks that become issues. This is not system issues.	(# of issues resolved on time / total issues) * 100	The issue due date will be agreed upon by Customer and Provider and the "on time" will be based on those due dates. The purpose is to ensure proactive management of issues.	G >= 95% Y 90% - 94% R < 90%	Monthly

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Project Quality: The percentage of deliverables (draft / final) accepted by Customer for meeting quality standards.	(# of deliverables accepted / total deliverables) * 100	Deliverables meet quality standards for content. Comments do not constitute rejection. Rejection is determined as unacceptable versus approved with constraints (minor edits).	G >=95% Y 90% - 94% R < 90%	Monthly

Fit-Gap and Configuration of the System

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Requirements Compliance: Meet functional and technical requirements	(# mandatory requirements passing testing / total requirements) *100	Manage the testing of requirements until Green (100%) is achieved	G 100% Y 90% - 99% R <= 90%	Monthly
Data Migration Completeness: Ability to complete data migration	(# of data records completely migrated / total data records) * 100	Manage the conversion of data until Green (100%) is achieved	G 100% Y 90% - 99% R <= 90%	Monthly
Single Sign on (SSO) Completeness: Meet single sign on NOTE: Single Sign on is just a special case of the overall technical requirements	(# SSO requirements passing testing / total requirements) *100	Manage the testing of requirements until Green (100%) is achieved	G 100% Y 90% - 99% R <= 90%	Monthly

Managed Service Support

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Uptime per month: 99.7% during the core hours in the QASP (NOTE: There is a 98% utilization overall in the requirements)	(# of minutes downtime per month /(1020 * # days)) * 100% NOTE – 1020 is the number of minutes from 7AM to 12AM	Provide for a stable system that will allow maximum usage by HR professionals and employees requiring self-service features.	G >= 99.7% Y 97% - 99.6% R < 97%	Quarterly
Errors in Interfaces: Error rate in data transmissions to GSA systems and other related interfaces	(# of failed submissions / total attempts) * 100	Monitor the accuracy of data transfers during operations	G >= 99.7% Y 95 % 99.7% R < 95%	Monthly
Customer Satisfaction: The average survey results	Sum of overall system rating (with 1-5 scale) / Number of respondents	Determine whether the users are happy and the efficiency the system	G > 4 Y 3 – 3.9 R < 3	Monthly
Tier 3 Help Desk Phone Response Time – rate of response to phone calls within 12 hours	(# calls returned within 12 business hours / total calls responded to) * 100	Ensure proper response time to the GSA Help Desk personnel	G > 97% Y 90% - 96.9% R < 90%	Monthly
Tier 3 Help Desk Response Time: rate of response to emails within 48 hours	(# emails returned within 48 hours / total emails responded to) * 100	Shows ability of the Contractor help desk to respond to customer inquiries quickly	G > 97% Y 90% - 96.9% R < 90%	Quarterly
Security Findings The percentage of High Plan of Action and Milestones (POA&M) findings resolved within GSA required timeframes	((# of issues closed for interval) / (# of issues scheduled for interval)) * 100	Ensure proper security of the system and remediation of known issues.	G = 100% Y 95% - 99.9% R < 95%	Monthly

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Office of Personnel Management (OPM) regulatory changes or Federally mandated application/table changes: Changes completed by due date.	((# changes completed during interval)/ (# changes required in the interval)) * 100	Ensure timely compliance by GSA with all Federal mandates	G > 97% Y 90% - 96.9% R < 90%	Quarterly
Timely notification of Planned outages: Percentage of notifications provided seven (7) days in advance.	((# notifications provided seven (7) days in advance) / (total planned outages)) * 100	Ensure timely notification to users so they can plan their work accordingly	G > 97% Y 90% - 96.9% R < 90%	Quarterly

ATTACHMENT O

Interface Requirements - HRT2T-HHS FOH ICD

(Electronically attached .doc)

ATTACHMENT P

Interface Requirements – HRT2T-LMS ICD

(Electronically attached .doc)

ATTACHMENT Q

Interface Requirements – HRT2T-NCUA ICD

(Electronically attached .doc)

ATTACHMENT R

Interface Requirements – HRT2T-NSA ICD

(Electronically attached .doc)

ATTACHMENT S

Interface Requirements – HRT2T-OPM OLU ICD

(Electronically attached .doc)

ATTACHMENT T

Interface Requirements – HRT2T-PAR ICD

(Electronically attached .doc)

ATTACHMENT U

Incremental Funding Chart (electronically attached .xls)

(Attached at award)

ATTACHMENT V

Questions and Answers Template

Company Name:
Solicitation Number: GSC-QF0B-16-33040

Note to offerors: Please provide the specific paragraph reference using the Section/sub-Section numbers in the solicitation.

PART #	PARAGRAPH #	PARAGRAPH TITLE	QUESTION	GOVERNMENT RESPONSE

PROJECT STAFFING PLAN TEMPLATE

(Delete at award)

Note: Provide one (1) sheet for the **Base Period** and one (1) sheet for **each Option Period**

Name	Company	Proposed Labor Category	Labor Category Number	Key Personnel (Yes or No)	Qualifications – related to their role on the project, e.g., hw/sw exp. and work exp.	Labor Hours by Task if Appropriate to the Solution				
						Task 1	Task 2	Task 3	Continued	Total
Total Hours by Task Area										

***Only fill in the qualifications the first time the name appears in the tables.**

Key Personnel Qualification Matrix
(To be removed at time of award)

EXAMPLE

The following is an example of how the matrix shall map to Section H of the task order. The example detailed below describes a case in which the task order requires a Senior Network Engineer:

7.1.X Senior Network Engineer

It is desirable that the Senior Network Engineer have significant experience managing the design, development, implementation, testing, and maintenance of large (over 100 servers, 1000 workstations, and 10 locations) local and wide area networks in a secure Federal Government environment. The Senior Network Expert should have IRM experience managing an integrated network with a diversity of users. The individual should be functionally proficient in the operations and maintenance of local, metropolitan, and wide area networks using automated network management tools, responding to both client and user requests for applications assistance and network modifications and enhancements. The Senior Network Engineer should have experience supervising at least thirty network support staff of various job categories and skills. The Senior Network Engineer should have broad-based skills and experience managing the migration of separate networks into single WAN, performing routine system maintenance and troubleshooting, managing the installation of software upgrades, maintaining network performance, and recommending enhancements.

The offeror for this example is proposing John Smith as a Senior IT Analyst. The Key Qualification Matrix would be formatted as follows:

KEY PERSONNEL QUALIFICATIONS MATRIX

Proposed Personnel Name: John Smith
Proposed meets the TO requirements (per 7.1..X) for: Senior Network Engineer
Proposed meets the requirements of the Basic Contract for Labor Category: Senior IT Analyst
Proposed meets the TO Clearance Level requirements: Not a requirement for this position
Proposed person is available to begin work on the following start date: XX/XX/XXXX

Requirements	**Years of Experience**	**Description of qualifications and experience**
Task Order Request Section 7.1.X		
Experience managing the design, development, implementation, testing, and maintenance of large (over 100 servers, 1000 workstations, and 10 locations) local and wide area networks in a secure Federal Government environment		
IRM experience managing an integrated network with a diversity of users		
Functionally proficient in the operations and maintenance of local, metropolitan, and wide area networks using automated network management tools, responding to both client and user requests for applications assistance and network modifications and enhancements		
Experience supervising at least thirty network support staff of various job categories and skills		
Broad-based skills and experience managing the migration of separate networks into a single WAN, performing routine system maintenance and troubleshooting, managing the installation of software upgrades, maintaining network performance, and recommending enhancements		

Note: Multiple pages for qualifications are acceptable.

See page limitations in section **11.7.3 KEY PERSONNEL QUALIFICATION MATRIX.**

END OF EXAMPLE

ATTACHMENT Y

CORPORATE EXPERIENCE SAMPLE TEMPLATE

CORPORATE EXPERIENCE (insert #) Program/Project Title:	Task Order Number:
Dollar value of the cited project:	Period of Performance:
Performing Business Unit:	
Client Agency:	Client Location:
Client POC #1 to contact (name, phone number and email):	Client POC #2 to contact (name, phone number and email):
Role of proposing offeror in the project:	Major deliverables produced
Similar Corporate Experience for each TOR Task Area: 1 – 9 (Also includes subtasks):	
.	

ATTACHMENT Z

PRICING WORKBOOK
(To be removed at award)

(Electronically attached .xls)

QUALITY ASSURANCE SURVEILLANCE PLAN (QASP)

GSC-QF0B-XX-XXXX

Human Resources (HR) and Time and Attendance (T&A) Systems, Migration and Managed Service Support

in support of:

General Services Administration (GSA) Office of Human Resource Management (OHRM)

FEDSIM Project Number 2016007GS

1.0 INTRODUCTION

This Quality Assurance Surveillance Plan (QASP) is pursuant to the requirements listed in the Performance Work Statement (PWS) entitled HR and T&A Systems, Migration and Managed Service Support. This plan sets forth the procedures and guidelines FEDSIM will use in ensuring the required performance standards or services levels are achieved by the contractor.

1.1 PURPOSE

The purpose of the QASP is to describe the systematic methods used to monitor performance and to identify the required documentation and the resources to be employed. The QASP provides a means for evaluating whether the contractor is meeting the performance standards or quality levels identified in the PWS and the contractor's Quality Control Plan (QCP), and to ensure that the Government pays only for the level of services received.

This QASP defines the roles and responsibilities of all members of the Integrated Project Team (IPT), identifies the performance objectives, defines the methodologies used to monitor and evaluate the contractor's performance, describes quality assurance documentation requirements, describes the analysis of quality assurance monitoring results, and provides a Performance Requirements Summary (RFQ Section 9, Attachment N) that includes the method used to improve contractor performance when appropriate.

1.2 PERFORMANCE MANAGEMENT APPROACH

The PWS structures the acquisition around "what" service or quality level is required, as opposed to "how" the contractor should perform the work (i.e., results, not compliance). This QASP will define the performance management approach to monitor and manage the contractor's performance to ensure the expected outcomes or performance objectives communicated in the PWS are achieved. Performance management rests on developing a capability to review and analyze information generated through performance assessment. The ability to make decisions based on the analysis of performance data is the cornerstone of performance management; this analysis yields information that indicates whether expected outcomes for the project are being achieved by the contractor.

Performance management represents a significant shift from the more traditional Quality Assurance (QA) concepts in several ways. Performance management focuses on assessing whether outcomes are being achieved and to what extent versus scrutiny of compliance with the processes used to achieve the outcome. A performance-based approach facilitates the contractor providing an innovative solution within the stated constraints that gives the Government the opportunity to receive outstanding results. A "results" focus provides the contractor flexibility to continuously improve and innovate over the course of the contract as long as the critical outcomes expected are being achieved and/or the desired performance levels are being met.

1.3 PEFORMANCE MANAGEMENT STRATEGY

The contractor is responsible for the quality of all work performed. The contractor measures that quality through the contractor's own Quality Control (QC) program. QC is work output, not workers, and therefore includes all work performed under this contract regardless of whether the work is performed by contractor employees or by subcontractors. The contractor's QCP shall set forth the staffing and procedures for self-inspecting the quality, timeliness, responsiveness, customer satisfaction, and other performance requirements in the PWS. The contractor shall develop and implement a performance management system with processes to assess and report its performance to the designated Government representative. This QASP enables the Government to take advantage of the contractor's QC program.

The Government representative(s) will monitor performance and review performance reports furnished by the contractor to determine how the contractor is performing against communicated performance objectives. The Government will make a determination regarding incentives based on performance measurement metric data and notify the contractor of those decisions. The contractor shall be responsible for making required changes in processes and practices to ensure performance is managed effectively.

2.0 ROLES AND RESPONSIBILITIES

2.1 Contracting Officer (CO)

The CO is responsible for monitoring contract compliance, contract administration, and cost control and for resolving any differences between the observations documented by the Contracting Officer's Representative (COR) and the contractor. The CO will designate one full-time COR as the Government authority for performance management. The number of additional representatives serving as technical inspectors depends on the complexity of the services measured, as well as the contractor's performance, and must be identified and designated by the CO.

2.2 Contracting Officer Representative (COR)

The COR is designated in writing by the CO to act as his or her authorized representative to assist in administering a contract. COR limitations are contained in the written appointment letter. The COR is responsible for technical administration of the project and ensures proper Government surveillance of the contractor's performance. The COR is not empowered to make any contractual commitments or to authorize any contractual changes on the Government's behalf. Any changes that the contractor deems may affect contract price, terms, or conditions shall be referred to the CO for action. The COR will have the responsibility for completing QA monitoring forms used to document the inspection and evaluation of the contractor's work performance. Government surveillance may occur under the inspection of services clause for any service relating to the contract.

3.0 IDENTIFICATION OF REQUIRED PERFORMANCE STANDARDS/QUALITY LEVELS

The required performance standards and/or quality levels are included in the PWS and in RFQ Section 9, Attachment N, "Performance Requirements Summary."

4.0 METHODOLOGIES TO MONITOR PERFORMANCE

4.1 Surveillance Techniques

In an effort to minimize the performance management burden, simplified surveillance methods shall be used by the government to evaluate contractor performance when appropriate. The primary methods of surveillance are:

a. Random sampling, which shall be performed by the COR designated inspector.
b. Inspection: Each month, the COR, shall review the generated documentation and enter summary results into the Quality Assurance Monitoring Form (Exhibit 1).
c. Periodic Inspection: COR typically performs the periodic inspection on a monthly basis.

4.2 Customer Feedback

The contractor is expected to establish and maintain professional communication between its employees and customers. The primary objective of this communication is customer satisfaction. Customer satisfaction is the most significant external indicator of the success and effectiveness of all services provided and can be measured through customer complaints.

Performance management drives the contractor to be customer focused through initially and internally addressing customer complaints and investigating the issues and/or problems. However, the customer always has the option to communicate complaints to the COR, as opposed to the contractor.

Customer complaints, to be considered valid, must set forth clearly and in writing the detailed nature of the complaint, must be signed, and must be forwarded to the COR. The COR will accept those customer complaints and investigate them using the Quality Assurance Monitoring Form: Customer Complaint Investigation, identified in Exhibit 3.

Customer feedback may also be obtained either from the results of formal customer satisfaction surveys or from random customer complaints.

4.3 Acceptable Quality Levels

The Acceptable Quality Levels (AQLs) included in RFQ Section 9, Attachment N, Performance Requirements Summary Table, for contractor performance are structured to allow the contractor to manage how the work is performed. For certain critical activities the desired performance level is established at 100 percent. Other levels of performance are keyed to the relative importance of the task in relation to the overall mission performance.

5.0 QUALITY ASSURANCE DOCUMENTATION

5.1 The Performance Management Feedback Loop

The performance management feedback loop begins with the communication of expected outcomes. Performance standards are expressed in the PWS and assessed using the performance monitoring techniques shown in RFQ Section 9, Attachment N.

5.2 Monitoring Forms

The Government's QA surveillance, accomplished by the COR, will be reported using the monitoring forms in Attachments 2 and 3. The forms, when completed, will document the Government's assessment of the contractor's performance under the contract to ensure that the required results are being achieved.

The COR will retain a copy of all completed QA monitoring forms.

6.0 ANALYSIS OF QUALITY ASSURANCE MONITORING RESULTS

6.1 Determining Performance

The Government shall use the monitoring methods cited to determine whether the performance standards, service levels have been met. If the contractor has not met the minimum requirements, it may be asked to develop a corrective action plan to show how and by what date it intends to bring performance up to the required levels.

6.2 Reporting

At the end of each month, the COR will prepare a written report for the COR summarizing the overall results of the quality assurance surveillance of the contractor's performance. This written report, which includes the contractor's submitted monthly report and the completed quality assurance monitoring forms (Exhibit 1), will become part of the QA documentation. It will enable the Government to support whether the contractor is meeting the performance standards.

6.3 Reviews and Resolution

The COR may require the contractor's project manager, or a designated alternate, to meet with the CO and other Government IPT personnel as deemed necessary to discuss performance evaluation. The COR will define a frequency of in-depth reviews with the contractor, including appropriate self-assessments by the contractor; however, if the need arises, the contractor will meet with the COR as often as required or per the contractor's request. The agenda of the reviews may include:

a. Monthly performance assessment data and trend analysis
b. Issues and concerns of both parties
c. Projected outlook for upcoming months and progress against expected trends, including a corrective action plan analysis

d. Recommendations for improved efficiency and/or effectiveness
e. Issues arising from the performance monitoring processes.

The CO and COR must coordinate and communicate with the contractor to resolve issues and concerns regarding marginal or unacceptable performance.

The CO, COR, and contractor should jointly formulate tactical and long-term courses of action. Decisions regarding changes to metrics, thresholds, or service levels should be clearly documented. Changes to service levels, procedures, and metrics will be incorporated as a contract modification.

EXHIBIT 1

SAMPLE QUALITY ASSURANCE MONITORING FORM

SERVICE or STANDARD: _____

_____

_____

_____

_____

SURVEY PERIOD: _____

SURVEILLANCE METHOD (Check):

❒ Random Sampling ❒ 100% Inspection ❒ Periodic Inspection ❒ Customer Complaint

LEVEL OF SURVEILLANCE (Check):

❒ Monthly ❒ Quarterly ❒ As needed

PERCENTAGE OF ITEMS SAMPLED DURING SURVEY PERIOD: _____ %

ANALYSIS OF RESULTS:

Observed Service Provider Performance Measurement Rate: _____%

Service Provider's Performance (Check): ❒ Meets Standards

❒ Does Not Meet Standards

Narrative of Performance During Survey Period: _____

_____

_____

_____

_____

PREPARED BY: _____ **DATE:** _____

EXHIBIT 2

QUALITY ASSURANCE MONITORING FORM –
CUSTOMER COMPLAINT INVESTIGATION

SERVICE or STANDARD:

_____
_____
_____

SURVEY PERIOD: _____

DATE/TIME COMPLAINT RECEIVED: _____ _____ AM / PM

SOURCE OF COMPLAINT: _____ (NAME)

_____ (ORGANIZATION)

_____ (PHONE NUMBER)

_____ (EMAIL ADDRESS)

NATURE OF COMPLAINT:

_____
_____
_____
_____

RESULTS OF COMPLAINT INVESTIGATION:

_____
_____
_____
_____

DATE/TIME SERVICE PROVIDER INFORMED OF COMPLAINT: _____ _____ AM / PM

CORRECTIVE ACTION TAKEN BY SERVICE PROVIDER:

_____
_____
_____
_____

RECEIVED AND VALIDATED BY: _____

PREPARED BY: _____ **DATE:** _____

ATTACHMENT BB

Interface Requirements – GCIMS ICD

(Electronically attached .doc)

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11.1 FAR 52.252-1 SOLICITATION PROVISIONS INCORPORATED BY REFERENCE (FEB 1998)

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the CO will make the full text available. The offeror is cautioned that the listed provisions may include blocks that must be completed by the offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the offeror may identify the provision by paragraph identifier and provide the appropriate information with its quotation of offer. The solicitation provisions and/or contract clauses are available in either HTML or PDF format at:
https://www.acquisition.gov/far

Clause No	Clause Title	Date
52.215-1	Instructions to Offerors-Competitive Acquisition	(JAN 2004)
52.215-20	Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data – Alternate IV	(OCT 2010)
52.232-38	Submission of Electronic Funds Transfer Information with Offer	(JUL 2013)

SOLICITATION PROVISIONS PROVIDED IN FULL TEXT:

FAR 52.215-20 Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data – Alternate IV (OCT 2010)

(a) Submission of certified cost or pricing data is not required.
(b) Provide information described below:

All data required to be submitted as part of the offeror's quote is described in Sections 11.7, 11.8, 11.9, and 11.10 of this solicitation. The offeror must use the formats for submission of data prescribed in these sections. By submitting a quote, the offeror grants the CO or an authorized representative the right to examine records that formed the basis for the pricing quote. That examination can take place at any time before award. It may include those books, records, documents, and other types of factual data (regardless of form or whether the data are specifically referenced or included in the quote as the basis for pricing) that will permit an adequate evaluation of the proposed price.

11.2 GENERAL INSTRUCTIONS

a. The offeror shall furnish the information required by this solicitation. A Standard Form (SF) 18, "Request for Quotation," completed and signed by the offeror, Block 14, constitutes the offeror's acceptance of the terms and conditions of the proposed TO. Therefore, the SF 18 must be executed by a representative of the offeror authorized to commit the offeror to contractual obligations.
b. The offeror is expected to examine this entire solicitation document including the Contract. Failure to do so will be at the offeror's own risk.

c. The Government may make award based on initial offers received, without discussion of such offers. Quotes shall set forth full, accurate, and complete information as required by this solicitation package (including Attachments). The penalty for making false statements in quotes is prescribed in 18 U.S.C. 1001.
d. An offeror submitting restrictive data will mark it as follows in accordance with the FAR 52.215-1, Instructions to Offerors - Competitive Acquisition, which is incorporated by reference. Clause 52.215-1(e) states: "Offerors that include in their proposals data that they do not want disclosed to the public for any purpose, or used by the Government except for evaluation purposes, shall –
   (1) Mark the title page with the following legend:
   This quote includes data that shall not be disclosed outside the Government and shall not be duplicated, used or disclosed--in whole or in part--for any purpose other than to evaluate this quote or quotation. If, however, a TO is awarded to this offeror as a result of--or in connection with--the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting TO. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to the restriction is contained in sheets (insert numbers or other identification of sheets); and
   (2) Mark each sheet of data it wishes to restrict with the following legend:
   Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this quote."
e. The Government assumes no liability for disclosure or use of unmarked data and may use or disclose the data for any purpose. Unless restricted, information submitted in response to this request may become subject to disclosure to the public pursuant to the provisions of the Freedom of Information Act (5 U.S.C. 551).
f. The authorized negotiator or the signatory of the SF 18 will be notified of the date and time of the oral technical Question and Answer (Q&A) session. The offeror shall provide the name of the individual, the position title, telephone number, fax number, and email address of that individual.

11.3 SUBMISSION OF QUESTIONS

Offerors are requested to submit their questions grouped by solicitation Section and make reference to the particular Section/Subsection number. Questions must be received before the date specified for receipt of questions using the format in Section 9 – List of Attachments, Attachment V. **Questions or requests for extension submitted after the cut-off date will not be considered.**

Any information given to a prospective offeror concerning this solicitation will be furnished promptly to other prospective offerors as an amendment to the solicitation.

11.4 AVAILABILITY OF EQUIPMENT AND SOFTWARE

All commercial hardware and software proposed in response to this solicitation document shall have been formally announced for general release on or before the closing date of the

solicitation. Failure to have equipment or software announced prior to submission of quote may render the offeror's quote unacceptable.

11.5 GENERAL INFORMATION

The total estimated T&M of the TO is between $87 million and $97 million. The estimate does not include FFP Tasks, Long Distance Travel, and ODCs. Any quote that is not within this range shall include an explanation that specifically draws the Government's attention to any unique technical aspects of the quote the offeror would like the Government to consider as the justification for the deviation from the range.

Quotes shall be valid for a period of not less than 120 calendar days from the date of delivery.

11.6 CONTRACTOR SUPPORT DURING TECHNICAL EVALUATION

The Government expects to have contractor support during the evaluation from E3 Federal Solutions, LLC and Business Intelligence, Inc. The prime offeror is encouraged to sign an NDA with E3 Federal Solutions, LLC and Business Intelligence, Inc. for its submission that addresses the written and video technical quotes (see GSAM 503.104-4). An offeror who chooses to enter into an NDA with E3 Federal Solutions, LLC and Business Intelligence, Inc. shall submit its corporate NDA to the respective POC listed below specifically referencing this solicitation. If an NDA is signed, the NDA shall be submitted with the proposal Part I submission. E3 Federal Solutions, LLC and Business Intelligence, Inc. are prohibited from proposing on any work related to GSA HR and T&A Systems, Migration, and Managed Service Support.

E3 Federal Solutions, LLC
POC: Will Fortier
Phone: 202.321.7011
Email: wfortier@e3federal.com

Business Intelligence, Inc.
POC: George Thompson, CEO
Phone: 703-801-4607
Email: tony.thompson@bii-va.com

11.7 SUBMISSION OF OFFERS

Each offer shall be provided to the Government in four Parts and shall contain the following:

a. Part I – Preliminary Written Price Quote Information
b. Part II – Remainder of Written Price Quote
c. Part III – Written Technical Quote
d. Part IV – Video Technical Quote Presentation

The Video Technical Quote Presentation slides, Part III, shall be separately bound from all other Parts.

The offeror shall submit each deliverable on the due dates indicated on the Cover Letter.

Unless otherwise specified, one page is one side of an 8.5" x 11" piece of paper.

All electronic files shall be in Microsoft Word or Excel formats. Any documents provided in Section 9 – List of Attachments shall be submitted using the same file format (e.g., Project Staffing Plan shall be submitted in Excel file format using the Excel template provided). Printed pages must maintain 1" margins, 12 point Times New Roman font, and be single spaced. Headers and footers may be of a larger font, but shall not be smaller than ten point Times New Roman font. Charts/Graphics/Tables embedded in quote will count toward page limitations. Charts/Graphics/Tables must maintain a font minimum of ten point Times New Roman Font, including in the Part III slides. Ledger paper size 11" x 17" may be used in the staffing plan when providing charts/graphics/tables. A single side of an 11" x 17" paper will be counted as two pages where page limitations apply. Items such as a Title Page, Table of Contents, Cover Letter, List of Figures, and Acronym Lists are excluded from the page counts below, unless they are inclusive of a document. (e.g., a Table of Contents within the Draft Transition-In Plan); in which case it would count toward the stated page limitations. PDF files will be allowed for executed documents such as Letters of Commitment.

Any pages submitted beyond the page limitations will be removed and not evaluated.

11.7.1 QUOTE PART I

Part I contains preliminary written Price Quote information. This volume shall contain the following:

a. Organizational Conflict of Interest Statement (TAB A)
b. Contractor Registration (TAB B)
c. Pass/Fail elements (TAB C)
    - Statement stating that the offeror possess Schedule 738 X: SIN 595-22, and SIN 595-26 (TAB C.1)
    - Key Personnel Names (TAB C.2)
    - Key Personnel Letters of Commitment (TAB C.3)
    - Section 508 Compliance Statement (TAB C.4)

11.7.2 QUOTE PART II

Part II is the remainder of the written Price Quote and shall contain the following:

d. Request for Quotation (SF 18) (TAB D)
e. Section 1 - Supplies or Services and Prices/Costs (TAB E).
f. Price Supporting Documentation (TAB F)
g. Subcontractor Supporting Documentation (TAB G)
h. Pricing Assumptions (TAB H)
i. Price Explanation (TAB I)
j. Security Requirements for Unclassified Information Technology Resources Statement (TAB J)

11.7.3 QUOTE PART III

Part III is the written Technical quote and shall contain the following: (page limitations, if applicable, are indicated in the parentheses following each item)

a. Project Staffing Plan Table
b. Key Personnel Qualification Matrix(KPQM) (three pages per Key Person)
c. Corporate Experience (15 pages total)
d. System Requirements
e. Integrated Master Schedule (IMS)
f. Training Plan (10 pages total)
g. Performance Measures
h. Technical Assumptions (if any)
i. Copy of Video Technical Quote Presentation Slides

The CO will schedule the oral technical Q&A sessions after all quotes are received. The video technical quote presentation shall contain the information shown in paragraph 11.11.5.

11.7.4 QUOTE PART IV

Part IV is the Video Technical Quote Presentation and shall address the following:

a. Technical Approach
b. Management Approach
c. Key Personnel and Project Staffing

The Video Technical Quote Presentation slides, which shall be separately bound, are due with Part II and Part III of the written quote. If the slides are not submitted by the quote due date specified in the Cover Letter, they will not be evaluated.

11.8 SUBMISSION OF THE WRITTEN PRICE QUOTE (PARTS I AND II)

Written Price Quotes shall be submitted as an original, one paper copy, and an electronic copy. The offeror shall submit all proposed costs using Microsoft Excel software utilizing the formats without cells locked and include all formulas. The quote shall contain the following tabs:

a. Organizational Conflict of Interest (OCI) Statement (Tab A). The offeror and each subcontractor, and consultant shall complete and sign an OCI Statement. All information pertaining to OCI is outlined in Section 7.4.1

   If the offeror signs an NDA with E3 Federal Solutions, LLC and Business Intelligence, Inc. the offeror may include the agreement in Tab A.

b. Contract Registration (Tab B). The offeror shall submit a statement that the contract vehicle under which this quote is being submitted has been registered in ASSIST and that all information in ASSIST is up-to-date.

c. Pass/Fail Elements (Tab C). The offeror must provide:

1. Schedule 738 X: The offeror shall provide a statement stating it possesses Schedule 738 X: SIN 22 and SIN 26.
2. Key Personnel: The offeror shall provide a list of all proposed Key Personnel, including key person name, position title and start date. This list shall be consistent with the information provided in the KPQM and Project Staffing Plan.
3. Key Personnel Letters of Commitment: The offeror shall provide a Letter of Commitment for each proposed Key Person, at the proposal Part I submission due date. To meet this Pass/Fail criterion, the letter shall be signed by the proposed Key Person and shall state that (1) the proposed Key Person named is employed by the offeror or subcontractor, or has an offer of employment from the offeror or subcontractor that the Key Person intends to accept in the event of an award being made to the offeror; and (2) the proposed Key Person is available and committed to begin work on the Project Start Date or a date that aligns with the proposed staffing plan.
4. Section 508 Compliance: The offeror's written quote shall include a statement indicating its capability to comply with Section 508 requirements (Section 7.5). The offeror's quote will be evaluated to determine whether it includes a statement indicating its capability to comply with Section 508 requirements throughout its performance of this TO. Any quote that does not include a statement indicating the offeror's capability to comply with Section 508 requirements throughout its performance of this TO shall be eliminated from further consideration for award.

d. Request for Quotation (SF 18) (Tab D). When completed and signed by the offeror, constitutes the offeror's acceptance of the terms and conditions of the proposed TO. Therefore, the form must be executed by representatives of the offeror authorized to commit the offeror to contractual obligations. The offeror shall sign the SF 18 in Block #14.

e. Supplies or Services and Prices (Tab E). The offeror shall indicate the price to be charged for each item in Section 1 - Supplies or Services and Price/Costs rounded to the nearest whole dollar.

f. Price Supporting Documentation (Tab F). The information requested in the quote is required to enable the Government to perform a price analysis. The offeror shall prepare one summary schedule (Section 1 – Supplies or Services and Prices/Costs) which provides the total NTE amount for each CLIN and the total NTE price offered. Along with the summary schedule, the offeror is required to provide full back-up documentation for the Labor CLINs for each period of performance and each task area using the provided Excel workbook (Section 9 – List of Attachments, Attachment Z). The back-up documentation shall detail the labor categories to be used, labor hours proposed by category, material and equipment costs, and a total cost breakdown to include a summary total for each cost component (e.g., labor, overhead, or general and administrative) support product price information).

g. Subcontractor Supporting Documentation (Tab G). Subcontracting is permissible under this RFQ. If subcontracting is proposed, all labor and materials proposed must be

contained within the prime contractor's GSA Schedule Contract. Furthermore, the prime contractor shall disclose to the Government's CO a copy of the subcontract pricing, and terms and conditions, and shall identify any small businesses. The Government will evaluate the acceptability of any subcontracting arrangement as part of its evaluation of price. Failure to provide complete supporting documentation may result in no further consideration of the offeror's quote. Subcontractors may submit proprietary data directly to the CO or through the prime contractor in a separate, sealed envelope. **The prime contractor shall specifically state whether the estimated costs of any proposed subcontractor will be in excess of $10M over the life of the TO for Government accomplished Equal Employment Opportunity (EEO) verification purposes.**

h. Pricing Assumptions (Tab H). The offeror must submit, under a separate tab, all (if any) assumptions upon which the Cost/Price Quote is based.

i. Price Explanation (Tab I). The offeror shall describe why the total price of the TO is above or below the range in Section 11.5. The offeror shall include an explanation that specifically draws the Government's attention to any unique technical aspects of the quote the offeror would like the Government to consider as the justification for the deviation from the range.

j. Security Requirements for Unclassified Information Technology Resources Statement (Tab J). In accordance with the General Services Administration Acquisition Regulation (GSAR) provision 552.239-70, Information Technology Security Plan and Security Authorization, the offeror shall submit a statement on its approach for completing the IT Security Plan, security authorization, and other requirements in accordance with GSAR clause 552.239-71, Security Requirements for Unclassified Information Technology Resources.

The offeror shall not include any price data in the technical, management, staffing or corporate experience portions of the quotes.

11.9 SUBMISSION OF THE WRITTEN TECHNICAL QUOTE (PART III)

Each offeror shall submit all information described in the following paragraphs. The offeror shall provide an original, ten copies, and an electronic copy on a CDfree of viruses and malware containing all required sections of this Part.

11.9.1 PROJECT STAFFING PLAN TABLE

The offeror shall provide a Project Staffing Plan Table in accordance with the Project Staffing Plan Table Template contained in Section 9 - List of Attachments, Attachment W. The submission shall contain all individuals that will be working on this effort. All Key Personnel proposed shall be identified in the Project Staffing Plan Table and available to begin work consistent with the date provided in the Letter of Commitment.

If the names of all non-Key Personnel are not known prior to offer submission, the offeror may indicate "to be determined" or TBD in the Project Staffing Plan Table. The names of non-Key Personnel are the only identifiers that may remain unspecified in the Project Staffing Plan Table. The names of all non-Key Personnel that can be provided shall be provided. Staffing in the

Project Staffing Plan Table provides a basis for the Government to determine the efficacy of the Project Staffing Plan in relation to the offeror's Technical Approach. If TBD is indicated for any non-Key Personnel, the offeror shall supply the offeror's proposed experience/certifications that would be needed to perform the proposed Technical Approach in that role. All qualification sections of the Project Staffing Plan Table shall be completed uniquely for each person or TBD role provided.

The offeror shall ensure there is consistency in the level of effort between the Staffing Plan provided in Part III and the Cost Quote provided in Part II, being cognizant of rounding issues. The offeror shall include all staff in each sheet of the Project Staffing Plan Table, regardless of whether there are hours proposed in that period.

11.9.2 KEY PERSONNEL QUALIFICATION MATRIX (KPQM)

The offeror shall submit a KPQM (see Section 9 – List of Attachments, Attachment X) for each Key Person proposed relating the specialized experience identified in Section 7.1 of this TO and the qualifications of the person or persons being proposed for that position. For those additional Key Personnel proposed, the offeror shall identify the specialized experience and the corresponding qualifications for this experience. Each KPQM shall be limited to three pages.

The offeror shall represent the following:

a. All Key Personnel meet the requirements of the TO.
b. The offeror shall include a statement that the proposed Key Person named is employed and available to begin work on the date provided in the Letter of Commitment for each Key Personnel.

11.9.3 CORPORATE EXPERIENCE REFERENCES

The offeror shall provide Corporate Experience for three projects performed within the last five years by the business unit that will perform this effort. To the greatest extent possible, Corporate Experience references shall be the offeror's direct experience as the prime contractor. These three projects must be similar in size, scope, and complexity to the requirements identified in Section 2 - PWS. The Corporate Experience information must be submitted in the format provided in Section 9 - List of Attachments, Attachment Y. The offeror should ensure that all of the POCs are aware that they may be contacted.

These three projects must be collectively similar in size, scope, and complexity to the requirements identified in Section C – Performance-Based Statement of Work. The contractor shall map its Corporate Experience references to the Task Areas of the RFQ, including the roles or functions performed by the contractor in support of the Corporate Experience reference.

All three projects shall be contracts or orders for the performance of actual technical requirements. Master contract vehicles (e.g., Blanket Purchase Agreements, Indefinite Delivery/Indefinite Quantity contracts) do not satisfy the Corporate Experience requirement unless submitted together with a TO similar in size, scope, and complexity to this requirement and awarded and performed under the vehicle.

11.9.4 (RESERVED)

11.9.5 SYSTEM REQUIREMENTS

System Requirements (Section 9 – List of Attachments, Attachments L and M) and Interface Requirements (Section 9 – List of Attachments, Attachments O through T) are integral to this RFQ, in addition to the supporting tasks outlined in Section 2 - PWS of the RFQ. The contractor shall review the Requirement Attachments (identified above) and identify if its COTS solution meets those requirements 'out of the box' through configurations, could be met through the development of an extension, or through a customization. The contractor shall describe how it will meet requirements in Attachment L and M provided in Section 9 – List of Attachments of the RFQ by marking the correct column for each functional requirement.

11.9.6 DRAFT IMS

The offeror shall provide a draft IMS for an HR and T&A Implementation in accordance with 2.5.1.4.5.

11.9.7 DRAFT TRAINING PLAN

The offeror shall provide a draft Training Plan for HR and T&A Implementation in accordance with 2.5.5.1.

11.9.8 PERFORMANCE MEASURES

The offeror shall provide Performance Measures to augment Performance Measures (Section 9 – List of Attachments, Attachment N) as appropriate to its quote. In addition, the offeror shall provide performance metrics for each of its proposed Performance Measures.

11.9.9 TECHNICAL ASSUMPTIONS

The offeror shall identify and address assumptions affecting the technical quote citing the component(s) of the quote to which they pertain. All technical assumptions and Basis of Estimate assumptions shall be included in the technical volume. This shall include any non-Price information that serves as the basis of a Price assumption identified in the offeror's Price Quote. The Government reserves the right to reject any quote that includes any assumption that adversely impacts the Government's requirements.

11.10 DELIVERY INSTRUCTIONS

The offeror shall deliver written quotes and receive acceptance from:
Mark H. Santasiero (Contracting Officer) or Millicent Hawkins (Contracting Specialist)
GSC-QF0B- 16-33040
FEDSIM Project Number 2016007GS
GSA FAS AAS FEDSIM

1800 F Street, NW
Washington, D.C. 20405

Quotes not received by 11:00 a.m. Eastern Time (ET) on the date stated in cover letter will not be considered.

Note: Please bring all quotes to the E Street entrance of the GSA building at 1800 F Street, NW, Washington, D.C. 20405. Upon arrival, call Millicent Hawkins, Contract Specialist, at 703-605-3654. The Contract Specialist will meet the offeror at the GSA loading dock on E Street. It is suggested that the offeror park on E Street in front of GSA or pull over right outside of the loading dock ramp to unload the boxes. Delivery acceptance/quote receipt will be given once the offeror has transferred his/her box of quote materials to the Contract Specialist at the loading dock on E Street. Please note that all quote boxes are subject to security scanning after receipt.

11.11 SUBMISSION OF THE VIDEO TECHNICAL QUOTE PRESENTATION (PART IV)

The offeror shall provide ten electronic copies of the Video Technical Quote Presentation containing the information required herein Section 11.11.5. The Video Technical Quote Presentation will be used to assess the offeror's capability to satisfy the requirements set forth in the RFQ.

Video Technical Quote Presentation slides presented that differ from slides delivered with the Technical Quote in Part III will not be evaluated in either Part III or Part IV.

While there will be a separate oral Q&A session scheduled (See Section 11.11.3.1), it is the Government's expectation that the offeror will present its initially submitted quote in a manner that is clear and complete.

11.11.1 VIDEO TECHNICAL QUOTE PRESENTATION CONSTRAINTS

The offeror shall identify all authors of the presentation by name and association with the offeror in the opening credits. Key Personnel introductions may be integrated into the video opening credits for clarity. Participation in the presentation shall be limited to the offeror's Key Personnel and no more than three additional corporate representatives of the offeror. An offeror's "Key Personnel" includes only those persons who will be assigned to the TO as Key Personnel as described in Section 7.1. The three additional corporate representatives (e.g., CEOs, company presidents, or contract representatives) from the offeror may appear for an introductory role, but will not be allowed to deliver the content of the offeror's quote. Introductory remarks by any corporate representatives will not be evaluated, but will count towards the offeror's allotted Video Technical Quote Presentation time. For the remainder of the presentation, only Key Personnel shall present. Content presented by any non-Key Personnel will not be evaluated. Unobtrusive company logos or names can be inserted in any or all video presentation slides or content.

The offeror's video presentation shall not exceed 90 minutes. There is no limit to the number of slides that can be presented during the Video Technical Quote Presentation within the allotted timeframe. Only those video presentation slides presented as part of the Video Technical Quote Presentation will be considered for evaluation. Any content presented after the time limit is reached and any slides over and above those presented during the video presentation will not be evaluated.

11.11.2 VIDEO TECHNICAL QUOTE PRESENTATION MEDIA

Content relating to specific solicitation requirements should be logically identified (e.g., sequentially numbered in the lower right corner of the video presentation slides, or titled in alignment with solicitation requirements). The offeror shall provide the presentation in one of three formats:

a. BluRay quality: H.264, 24Mbps, file type: .MP4
b. DVD-ROM HD quality: H.264, 24 Mbps, file type: .MP4
c. DVD (regular) quality: H.222/H.262, 9 Mbps, file type .MP4

Please note, the Government does not have a preference as to which format offerors elect to use. Video Resolution is up to the offeror. Resolution quality is not rated in the technical evaluation. Submission in a single, playable disk is preferred.

GSA FEDSIM uses Azend Group Corp Model#BDP-M1061, Sony Model#BDP-SX1000, and ASUS Blu-Ray Combo Model#SBC-06D2X-U Video players to view video media. Offerors are encouraged to test video playback and compliance using the same models. As an alternative, the offeror may contact the FEDSIM CS at least one week prior to the due date of Quote Part IV, Video Technical Quote Presentation, to schedule a time in which the offeror can utilize one of FEDSIM's players to assess playability themselves. The FEDSIM CS will provide the video player to the offeror and the offeror will have no longer than 30 minutes to assess playability. The video presentation shall be in a presentation format. Generally, the visual of the Key Personnel presenting the content shall be visible and not obscure the slide. Limited use of graphics will be allowed, such as zooming in to parts of the offeror's technical solution. During this time, the visual of the Key Personnel may be replaced with the name of the speaker. Limited use of animation for technical diagrams is allowable. While this will not be evaluated, the Government discourages the use of transitions and advanced video graphics or cinematic features.

Each slide shall reference in the top right corner, the Section/subsection number from Section 2 and the Section 5 deliverable that is being described/discussed on the slide, where applicable.

11.11.3 TECHNICAL QUOTE ORAL Q&A SESSION

Each offeror determined to have passed all Pass/Fail requirements shall participate in an oral Q&A session led by the FEDSIM CO and participated in by the Technical Evaluation Board (TEB) Members and other representatives of the Government. The FEDSIM CO will schedule the Q&A session once all Part I quotes are received.

The purpose of the oral Q&A session is to allow the Government to ask questions, as deemed necessary, that will serve to clarify to the Government, for evaluation purposes, the offeror's methodologies and approaches as proposed. It is the Government's intent to ask clarifying questions only to the extent deemed minimally necessary for the evaluators to sufficiently understand what is being proposed.

Attendance at the oral Q&A session is limited to the offeror's proposed Key Personnel and no more than three additional corporate representatives of the offeror. The offeror's Key Personnel shall be prepared to answer questions about Parts III and IV in the oral Q&A session. The oral Q&A session will be held at the unclassified level.

11.11.3.1 TECHNICAL QUOTE ORAL Q&A SESSION SCHEDULING

The FEDSIM CO will schedule the oral Q&A session with the authorized negotiator or the signatory of the SF 18. Time slots will be assigned randomly and may not be changed or traded. The Government reserves the right to reschedule any offeror's oral Q&A session at its sole discretion.

The oral Q&A session will be held at facilities designated by the FEDSIM CO. The exact location and any other relevant information will be provided when scheduled.

11.11.3.2 TECHNICAL QUOTE ORAL Q&A SESSION FORMAT

The offeror shall address any clarification questions posed by the FEDSIM CO or the TEB Chairperson. Although no stated time limit for the duration of the oral Q&A session will be imposed, for planning purposes, it is anticipated that the sessions should not last more than two hours.

The offeror shall bring bound printed copies of its Parts III and IV technical quote volumes to refer to throughout its designated session. The offeror will not be presenting any information to the Government other than answering the clarification questions posed.

During the initial oral Q&A session, the offeror will address any clarification questions posed by the TEB Chairperson. The offeror may briefly caucus to coordinate responses to specific requests for clarifications. These brief caucuses may not last longer than five minutes before presenting the coordinated response. The entire session will be documented by the Government.
Upon completion of the oral Q&A session, the Government may caucus to formulate any additional clarification questions regarding the technical quote; however, quote revisions are not expected and will NOT be allowed.

11.11.4 RECORDING OF THE TECHNICAL QUOTE ORAL Q&A SESSION

The offeror may not record or transmit any of the oral Q&A session. All offeror's electronic devices shall be removed from the room during the oral Q&A session. The offeror is permitted to have an electronic timer in the room during the oral Q&A session.

11.11.5 VIDEO TECHNICAL QUOTE PRESENTATION TOPICS

Within the Video Technical Quote Presentation, the Government does not expect the offeror to provide a restatement of the information already submitted in writing in Part III. Instead, the offeror shall address this information under the topics provided. The Video Technical Quote Presentation shall include the following topics, and be organized in the following order:

a. Topic 1: Technical Approach
b. Topic 2: Management Approach
c. Topic 3: Key Personnel and Project Staffing

11.11.5.1 TECHNICAL APPROACH (TOPIC 1)

During the video presentation, the offeror shall discuss its Technical Approach in fulfilling the technical requirements identified in the RFQ as identified below. The offeror's quote shall be clear and relevant to the requirements. The offeror shall tailor its Technical Approach to achieve the requirements as identified in Section 2, Section 5, and Section 7 of the RFQ. The offeror shall describe its approach to:

a. Supporting functional requirements identified in paragraphs 2.2.1 and 2.2.2 in the Scope Section of the RFQ.
b. Establishing and managing a pre-migration hosting environment.
c. Pre-migration preparation of systems.
d. Preparing and delivering training.
e. Migrating, supporting, and stabilizing systems.
f. Providing managed services solutions.
g. Transitioning-on a new customer within its proposed timeline, and
h. Conducting the Business Process Realignment assessment to include the steps taken after the assessment.

11.11.5.2 MANAGEMENT APPROACH (TOPIC 2)

During the video presentation, the offeror shall discuss a relevant Management Approach in fulfilling the technical requirements identified in the RFQ. The offeror shall tailor its Management Approach to achieve the requirements as identified in Section 2, Section 5, and Section 7 of the RFQ. The offeror shall describe:

a. Its approach to Project Management support.
b. Its approach to security management.
c. Its approach and suggested augmentation to performance measures (Section 9 – List of Attachments, Attachment N).
d. Current risks based on the RFQ's requirements and anticipated actions to mitigate or eliminate risks.
e. Its communication plan for customer relationship management and problem escalation (e.g., Government stakeholders, and corporate headquarters).
f. Its approach to incorporating small business subcontracting throughout the life of the contract.

11.11.5.3 KEY PERSONNEL AND PROJECT STAFFING (TOPIC 3)

During the video presentation, the offeror shall discuss its Key Personnel and Project Staffing approach in fulfilling the technical requirements identified in the RFQ. The offeror's proposed approach should be relevant to the RFQ. The offeror shall describe:

a. It's rationale for proposed labor categories for each RFQ task.
b. The value that the proposed project team provides (skills, experience, and qualification to completing the RFQ's requirements).
c. It's rationale for choosing its proposed Key Personnel.
d. How each Key Person would be involved in each task/subtask and how their qualifications and experience uniquely qualify them for the Key Personnel positions described in Section 7.1 – Key Personnel.

12.1 METHOD OF AWARD

The Government anticipates awarding a TO to the offeror whose quote is the most advantageous to the Government, price and other factors considered. Technical quotes will be evaluated based on the factors described in Section 12.8. All evaluation factors other than price, when combined, are significantly more important than price. Award will be made to the offeror whose quote is determined be the best value for the Government.

Quotes shall set forth full, accurate, and complete information as required by this solicitation package (including Attachments). The penalty for making false statements in quotes is prescribed in 18 U.S.C. 1001.

12.2 PASS/FAIL ELEMENTS

The Government will evaluate the following pass/fail elements. **A failure on any single Pass/Fail criteria will make the quote ineligible for award,** with no further evaluation of the technical and cost quote accomplished by the Government.

Pass/Fail Elements:
The following will be evaluated on a Pass/Fail basis:

a. The Government will reject any quote in which the offeror does not possess the required **Schedule 738 X:** SIN 22 (Private SSC for Core HR Services) and SIN 26 (Private SSC for non-Core HR Services) (Section 11.8).
b. The Government will reject any quote that does not provide a name for each Key Person proposed at the quote submission due date. A quote that states, “To Be Determined” or TBD for a proposed Key Person, or omits a Key Person, will be rejected by the Government (Section 11.8).
c. The Government will reject any quote that does not provide a Letter of Commitment, signed by each proposed Key Person at the quote submission due date (Section 11.8).
d. The Government will reject any quote that does not provide a Section 508 Compliance Statement (Section 7.5, Section 11.8).

12.3 EXPLANANTION FOR BASIS OF AWARD

This award will be made under FAR 8.4; formal debriefings will not be conducted. In accordance with 8.405-2(d), a brief explanation of the basis for the award decision will be provided upon request.

12.4 PRICE QUOTE EVALUATION

The offeror’s written price quote including the six-month extension period authorized by FAR clause 52.217-8 (Section 11.8, Parts I and II, Tabs A through J) will be evaluated to determine price reasonableness. An analysis of price reasonableness will be made only if the offeror receives an overall technical rating of ACCEPTABLE or higher.

The offeror's written price quote will be evaluated by the Government. Prices that are excessively high or low (without sufficient justification) may be considered unrealistic and unreasonable and may receive no further consideration. Any quote that is not within the total cited in Section 1 - Supplies or Services and Price/Costs and in Section 11 - Instructions, Conditions and Notices to Offerors, shall include an explanation that specifically draws the Government's attention to any unique technical aspects of the quote the offeror would like the Government to consider as the justification for the deviation from the range.

The Government will evaluate each price quote for the reasonableness of its pricing. The fair and reasonable price determination will look at the labor mix and hours proposed. Price reasonableness will be determined by looking at whether the total price is reasonable, since labor and material rates set forth in GSA Schedule contracts are deemed fair and reasonable under FAR 8.404(d). Price reasonableness will also include a determination by the FEDSIM CO that proper discounts have been offered commensurate with maximum order thresholds for prime contractors and in accordance with subcontractor arrangements. Also, the Government will consider team discounts that are required to remain in effect for the period of performance of the TO.

12.5 ORGANIZATIONAL CONFLICT OF INTEREST

Tab A will be evaluated to assess whether or not an actual or potential OCI exists. If an actual or potential conflict of interest is identified that cannot be mitigated, avoided, or waived in accordance with FAR Part 9.5, that offeror will be ineligible for award.

Note: OCI determinations can only be assessed at time of quote when complete information is present.

12.6 PRICE ASSUMPTIONS

The Government reserves the right to reject any quote that includes any price assumptions that may adversely impact satisfying the Government's requirements.

12.7 OVERTIME AND EXTENDED BILLING HOUR PRACTICES

The Government reserves the right to reject any quote that includes overtime or extended hours billing practices that adversely impact or affect the Government's requirements.

12.8 TECHNICAL EVALUATION FACTORS

The Government will evaluate technical quotes (Section 11 - Instructions, Conditions, and Notices to Offerors or Respondents, Part III and Part IV) based on the following factors:

Factor 1: Technical Approach to include the written responses to Systems Requirements (Section 11.9.5), to the written IMP (Section 11.9.6), and to the written Training Plan (Section 11.9.7), as well as information presented under the technical approach factor (Section 11.11.5.1) as part of the video technical presentation.

Factor 2: Management Approach to include the written responses to Performance Measures (Section 11.9.8) as well as information presented under the management approach factor (Section 11.11.5.2) as part of the video technical presentation.

Factor 3: Key Personnel and Project Staffing as shown on the written Project Staffing Plan Table (Section 11.9.1) the written Key Personnel qualifications (Sections 7.1 and 11.9.2) as well as information presented under the Key Personnel and Project Staffing factor (Section 11.11.5.3) as part of the video technical presentation.

Factor 4: Corporate Experience (Section 11.9.3).

The technical quote evaluation factors are listed in descending order of importance. All four technical factors when combined are significantly more important than price. The Government will combine the results of the written and video submissions to arrive at a rating for the technical evaluation factors as a whole. The receipt of an evaluation rating of Not Acceptable in any single Factor will result in the overall quote being determined Not Acceptable and therefore ineligible for award.

12.8.1 FACTOR 1: TECHNICAL APPROACH

The offeror's Technical Approach will be evaluated based on its adherence to the instructions identified in Section 11.11.5.1. In addition, the offeror's Technical Approach will be evaluated on its clarity, relevance, comprehensiveness, level of detail, and degree to which it is effective.

The offeror's ability to meet systems requirements (11.9.5) will be evaluated on its responses to requirements outlined in Section 2.2.2 and the requirements in Section 9 – List of Attachments, Attachments L, M, O, P, Q, R, S, and T. The offeror's response will be evaluated on its clarity, relevance, comprehensiveness, level of detail, and effectiveness.

The offeror's IMS will be evaluated based on its adherence to the instructions identified in Section 11.9.6, and on its clarity, relevance, comprehensiveness, level of detail, and effectiveness.

The offeror's Training Plan will be evaluated based on its adherence to the instructions identified in Section 11.9.7, and on its clarity, relevance, comprehensiveness, level of detail, and effectiveness.

12.8.2 FACTOR 2: MANAGEMENT APPROACH

The offeror's Management Approach will be evaluated based on its adherence to the instructions identified in Section 11.11.5.2. In addition, the offeror's Management Approach will be evaluated on its clarity, relevance, comprehensiveness, level of detail, and effectiveness.

The Government provided Performance Measures (Attachment N). In accordance with Section 11.11.5.2, the Government will evaluate the offeror's approach and suggested augmentation to

performance measures based on clarity and relevance to RFQ requirements. The Performance Measures will also be evaluated on comprehensiveness, level of detail, and effectiveness.

12.8.3 FACTOR 3: KEY PERSONNEL AND PROJECT STAFFING

The offeror's Key Personnel and Project Staffing approach will be evaluated based on its adherence to the instructions identified in Section 11.11.5.3, and on its clarity, relevance, comprehensiveness, level of detail, and degree to which it is effective.

The offeror's Project Staffing Plan will be evaluated on its clarity, relevance, and adherence to the Project Staffing Plan template identified in Section 9 – List of Attachments, Attachment W and its adherence to the instructions and requirements identified in Section 11.9.1.

The offeror's KPQM will be evaluated on its adherence to the KPQM template identified in Section 9 – List of Attachments, Attachment X. In addition, the KPQM will be assessed with respect to Section 7.1 criteria as well as how clear, relevant, comprehensive, and detailed it is and on its adherence to the instructions/and requirements identified in Section 11.9.2.

12.8.4 FACTOR 4: CORPORATE EXPERIENCE

The Government will evaluate Corporate Experience from any proposed team member. The offeror's Corporate Experience will be evaluated based on its adherence to the instructions identified in Section 11.9.3 as well as its clarity. Corporate Experience will be evaluated on its similarity in size, scope, and complexity to the RFQ's requirements as well as the degree to which it is comprehensive and effective.

12.9 TECHNICAL ASSUMPTIONS

Offeror assumptions will be reviewed in the context of the technical factor to which they apply. The Government reserves the right to reject any quote that includes any assumption that may adversely impact satisfying the Government's requirements.

HRT2T Program

Interface Control Document between
HR Shared Service Center
and the GSA Credential and Identity Management System

Dated - March 2016

Interface Control Document between
HR Shared Service and GCIMS

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Interface Control Document between
HR Shared Service and GCIMS

1 Introduction

The Human Resources (HR) Shared Service Center (SSC) will be the new system that GSA's Office of Human Resources (OHRM) uses to manage HR functions. This is an approved OPM SSC that will require interfaces with GSA systems. The HR SSC will include many primary core functions, but as it relates to this interface, the HR SSC will include the authoritative list of employees and their characteristics, and the time recording data for each employee for each pay period. There are multiple existing interfaces between GSA's current system Comprehensive Human Resources Integrated System (CHRIS) and GSA systems. These interfaces must be retained in the new system to avoid rework of the GSA systems.

The GSA Credential and Identity Management System (GCIMS) is a web based application that manages credential and background investigation information of all GSA employees and contractors. The HR SSC and GCIMS will have an integration point to pass employee information to keep the two systems synchronized in terms of employees needing background investigations and the status of investigations completed or in progress.

Note - The actual file formats and fields are subject to change prior to implementation of the interface but are provided here for evaluation by the vendor of the complexity of the interfaces.

2 Scope

The data flows between the HR SSC and LMS will be primarily file based flows using SFTP. Please consult the details of each flow for confirmation of the protocols, data types, etc. The following table summarizes the data flows.

Interface Name	Description	Source System	Target System	Existing File?
Employee Data	Provide a full listing of employees	HR SSC	GCIMS	Y
Organization Data	Provide a listing of organizations to be managed	HR SSC	GCIMS	Y
Separation Data	Provide data about separated employees	HR SSC	GCIMS	Y
Federal Credential Data	Provide data for employees including their Smart Credential Number	GCIMS	HR SSC	Y

3 Detailed Specification

Each flow described in the Scope section has its own specification.

3.1 Employee Data – HR SSC to GCIMS

3.1.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR044
Purpose of Interface	The GCIMS system needs information about all employees in the HR system and their status of background investigation.
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	GCIMS
Receiving System Owner	GSA
Type of File	ASCII – fixed field length
Number of data elements	81
Description of data elements in interface	Employee data with information such as country of citizenship and information in order to begin background investigation requests.
Current Protocol Used	SFTP
Production Frequency	Daily M-F @ 18:00
Sequencing of interface	N/A
Approximate size of file	~ 3700 bytes * 12,000 employees
Other Notes and Comments	

3.1.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
CHRIS System Generated Unique number	Number	30	
CHRIS Employee Number	Number	15	
Last Name and Suffix	Character	150	
First Name	Character	150	
Middle Name	Character	60	
City of Birth	Character	90	
State of Birth	Character	90	
Country of Birth	Character	2	
Country of Citizenship	Character	30	
U.S. Citizen	Character	1	
Preferred First Name	Character	80	
Agency Code	Character	4	
Home Address 1	Character	240	
Home Address 2	Character	240	
Home City	Character	30	
Home State	Character	2	
Home Zip Code	Character	30	
Home Country	Character	4	
SSN	Character	11	
Date of Birth	Date	11	DD-MON-YYYY
Employee Status	Character	8	
Assignment Status	Character	80	
Duty Status	Character	2	
Gender	Character	1	
SCD Leave	Date	11	DD-MON-YYYY
Prior Investigation	Character	30	
Type Of Investigation	Character	30	
Date of Investigation	Date	11	DD-MON-YYYY
Type of Invest to Request	Character	30	
Adjudicator	Character	240	
Position Control Number (PCN)	Character	15	

Interface Control Document between
HR Shared Service and GCIMS

Data Item	Data Type	Length	Format
Position Control Number (PCN) Indicator	Character	1	
Job Title	Character	80	
Supervisory Status	Character	80	
Pay Plan	Character	2	
Job Series	Character	4	
Level/Grade	Character	2	
Work Schedule	Character	1	
Key Emergency Essential Designation	Character	1	
LEO Position Indicator	Character	1	
Position Telework Eligibility	Character	1	
Position Sensitivity	Character	1	
Position Start Date	Date	11	DD-MON-YYYY
Region	Character	1	
Duty Location Code	Character	9	
Duty Location City	Character	40	
Duty Location State	Character	40	
Duty Location County	Character	40	
Agency Code/Subelement	Character	4	
Organization Code	Character	240	
Office Symbol	Character	18	
Detail Begin Date	Date	11	DD-MON-YYYY
Detail End Date	Date	11	DD-MON-YYYY
Detail Position Control Number (PCN)	Character	15	
Detail Position Control Number (PCN) Indicator	Character	1	
Detail Position Number	Character	15	
Detail Position Title	Character	60	
Detail Organization Code	Character	240	
Detail Office Symbol	Character	18	
Detail Pay Plan	Character	2	
Detail Job Series	Character	4	
Detail Level/Grade	Character	2	
Detail Work Schedule	Character	1	
Detail Region	Character	1	
Detail Duty Location Code	Character	9	
Detail Duty Location City	Character	40	

Data Item	Data Type	Length	Format
Detail Duty Location State	Character	40	
Detail Duty Location County	Character	40	
Supervisors CHRIS Employee Number	Character	30	
Supervisors GCIMS CHRIS ID	Number	15	
Supervisors Last Name and Suffix	Character	150	
Supervisors First Name	Character	150	
Supervisors Middle Name	Character	60	
Supervisors Position Control Number (PCN)	Character	15	
Supervisors Position Control Number (PCN) Indicator	Character	1	
Supervisor Email Address	Character	150	
Address Line 3	Character	240	
Type of Employment	Character	1	
Handicap (Disability)	Character	1	
Position Title	Character	60	
Position Organization	Character	18	

3.2 Organization Data – HR SSC to GCIMS

3.2.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR044
Purpose of Interface	The GCIMS system needs information about the organizational structure from the HR system.
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	GCIMS
Receiving System Owner	GSA

Summary Description	
Attribute	**Description**
Type of File	ASCII – fixed field length
Number of data elements	21
Description of data elements in interface	List of organizations and addresses for contact purposes
Current Protocol Used	SFTP
Production Frequency	Daily M-F @ 18:00
Sequencing of interface	N/A
Approximate size of file	~ 1024 bytes * number of organizations in the HR system
Other Notes and Comments	

3.2.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
Abolished by Order	Character	60	
Agency Code/Subelement	Character	4	
Changed by Order	Character	60	
Created by Order	Character	60	
Date Abolished	Date	11	
Date of Last Change	Date	11	
From Date	Date	11	
Location	Character	9	
Location Address	Character	240	
Name	Character	240	
Office Symbol	Character	18	
OPM Organizational Component	Character	18	
Org Info Line 1	Character	38	
Org Info Line 2	Character	38	
Org Info Line 3	Character	38	
Org Info Line 4	Character	38	

Data Item	Data Type	Length	Format
Org Info Line 5	Character	38	
Org Info Line 6	Character	38	
Personnel Office Identifier	Character	4	
To Date	Date	11	
OCT Org Title	Character	38	

3.3 Separation Data – HR SSC to GCIMS

3.3.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR044
Purpose of Interface	The GCIMS system needs information about employees who have separated in the last day.
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	GCIMS
Receiving System Owner	GSA
Type of File	ASCII – fixed field length
Number of data elements	9
Description of data elements in interface	List of separated employees and their separation dates
Current Protocol Used	SFTP
Production Frequency	Daily M-F @ 18:00
Sequencing of interface	N/A
Approximate size of file	~ 564 bytes * number of employees separated since the day before

Summary Description	
Attribute	**Description**
Other Notes and Comments	

3.3.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
CHRIS System Generated Unique number	Number	15	
CHRIS Employee Number	Number	15	
Last Name and Suffix	Character	150	
First Name	Character	150	
Middle Name	Character	60	
Preferred First Name	Character	150	
SSN	Character	11	
Reason for Separation	Character	2	
Separation Date	Character	11	

3.4 Federal Credential Data – GCIMS to HR SSC

3.4.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR044
Purpose of Interface	The HR system needs information about the status of background investigations. The interface contains employees whose investigations are completed.
Source System/Module and/or entity	GCIMS
Source System Owner	GSA
Receiving System	HR SSC

Summary Description	
Attribute	**Description**
Receiving System Owner	TBA
Type of File	ASCII – fixed field length
Number of data elements	37
Description of data elements in interface	List of separated employees and their separation dates
Current Protocol Used	SFTP
Production Frequency	Daily M-F @ 21:00
Sequencing of interface	N/A
Approximate size of file	~ 3435 bytes * number of employees whose background investigations completed that day
Other Notes and Comments	

3.4.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
CHRIS ID	Number	15	
CHRIS Employee Number	Number	15	
Last Name and Suffix	Character	150	
First Name	Character	150	
Middle Name	Character	60	
City of Birth	Character	90	
State of Birth	Character	90	
Country of Birth	Character	2	
Country of Citizenship	Character	30	
Preferred First Name	Character	80	
Work Building Name	Character	150	
Work Building #	Character	150	

Data Item	Data Type	Length	Format
Work Room/Cubicle	Character	20	
Work Address Line 1	Character	240	
Work Address City	Character	30	
Work Address State	Character	2	
Work Address Zip Code	Character	30	
Work Phone Number	Character	60	
Work FAX Number	Character	60	
Work Cell Number	Character	60	
Work Phone Number TTY	Character	60	
Work Email Address	Character	240	
Work Blackberry PIN	Character	60	
Personal Home Phone	Character	60	
Personal Cell Phone	Character	60	
Personal Email Address	Character	240	
Emergency Point of Contact (POC) Last Name	Character	240	
Emergency Point of Contact (POC) First Name	Character	240	
Emergency POC Home Phone Number	Character	60	
Emergency POC Work Phone Number	Character	60	
Emergency POC Cell Number	Character	60	
Out of Area Emergency Point of Contact Last Name	Character	1	
Out of Area Emergency Point of Contact First Name	Character	240	
Out of Area POC Home Phone Number	Character	60	
Out of Area POC Work Phone Number	Character	60	
Out of Area POC Cell Number	Character	60	
Federal Agency Smart Credential Number	Character	150	

4 Appendix A: Glossary of Terms

The following table defines the attributes used in the interface descriptions in this document.

Summary Description	
Attribute	**Description**
RTM Number	This is the number assigned and will be contained in the RTM
Purpose of Interface	A business description of the reason for the interface/extract/file transfer
Source System/Module and/or entity	This should map to one of the systems and modules listed in the diagram in Section 1.For example:CHRIS Personnel Action Processing
Source System Owner	This could be GSA, an external entity or an external customer agency
Receiving System	The system that is receiving the interface. If this is just a file being sent without direct interaction with a system (such as an extract), please note that fact
Receiving System Owner	This could be GSA, an external entity or an external customer agency
Type of File	Indicate the format of the file, e.g., comma-separated values (CVS), Extensible Markup Language (XML), text (TXT), etc.
Number of data elements	A count of how many fields are presented in the file/interface
Description of data elements in interface	List and/or description of the data elements (in layman's terms) in the file
Transfer Protocol	Description of the communication(s) protocol(s) used
Production Frequency	Describe whether this interface is daily, weekly, monthly, etc...or a combination of those

Summary Description	
Attribute	**Description**
Security Considerations	Describe any special security requirements that are applicable to this interface/file
Sequencing of interface	Describe when this interface occurs and whether there are any dependencies on other jobs and/or interfaces before this one can be produced and sent
Timing constraints	The specific time of day with time zone that the interface must be created and sent. Note if a deadline is a hard deadline or if it is flexible and/or negotiable
Approximate size of file	Description of the sizing of the files
File Name Format	How the file should be named, if available.
Other Notes and Comments	

Requirement Number	Requirement Type	Non-Functional Type	Description	Mandatory / Optional	Who	In The Box	Extension	Customization
LR002	OPM		Ensure that collective bargaining agreements are recorded in appropriate databases.	Optional	Shared Service Center/Agency			
LR003	OPM		Support the implementation of an agreement made between management and the exclusive representative of a labor unit.	Optional	Shared Service Center/Agency			
LR003.01	Functional		Support the implementation of an agreement made between management and the exclusive representative of a labor unit IAW 5 USC 7114(b)(5).	Optional	Shared Service Center/Agency			
LR004	OPM		Verify deduction of dues from the pay of the union members is appropriate in accordance with 5 USC 7115(c).	Optional	Shared Service Center/Agency			
LR007	OPM		Capture data related to labor relations contract administration.	Optional	Shared Service Center/Agency			
LR007.01	Functional		Capture data related to labor relations contract administration IAW 5 USC.	Optional	Shared Service Center/Agency			
LR008	OPM		Provide labor relations support that enables the agency to accomplish its mission.	Optional	Shared Service Center/Agency			
LR008.01	Functional		Provide labor relations support that enables the agency to accomplish its mission IAW HCAAF Section IV: Labor Management Relations.	Optional	Shared Service Center/Agency			
LR012	OPM		Capture data related to labor-management relations programs.	Optional	Shared Service Center/Agency			
					TOTAL			

Requirement Number	Requirement Type	Non-Functional Type	Description	Mandatory / Optional	Who	In The Box	Extension	Customization
LTC001	OPM		Track compensation trends in accordance with (IAW) applicable laws rules regulations and guidelines.	Optional	Shared Service Center/Agency			
LTC001.01	Functional		Track compensation trends in accordance with (IAW) applicable laws rules regulations and guidelines, IAW Primary Reference: 5 USC Chapters 45, 53, 57 (subchapter IV), 59, 61, 63, 97, and 99; 29 USC; 31 USC; 38 USC, Chapter 74; 5 CFR 591.204, 241, 242, 9701, 9901; Financial Institutions Reform, Recovery and Enforcement Act (FIRREA)	Optional	Shared Service Center			
LTC002	OPM		Support agency participation in committees IAW applicable laws policies and regulations.	Mandatory	Shared Service Center/Agency			
LTC003	OPM		Ensure that equivalent increases occur IAW CFR 531 and other applicable laws rules regulations and guidelines.	Mandatory	Shared Service Center/Agency			
LTC003.01	Functional		Ensure that equivalent increases occur IAW 5 CFR 531 and other applicable laws rules regulations and guidelines, IAW with Primary Reference: 38 USC; 5 CFR 532.229 and 591.240-242.	Mandatory	Shared Service Center			
LTC004	OPM		Maintain compensation management records IAW applicable laws rules regulations and guidelines.	Mandatory	Shared Service Center/Agency			
LTC004.01	Functional		Maintain compensation management records IAW applicable laws rules regulations and guidelines and 5 USC 63, Subchapter IV, 97, and 99; 38 USC; 5 CFR 430.405; 5 CFR 451.106; 5 CFR 534.405; 5 CFR 537.110; 5 CFR 531.507; 5 CFR 551.402; 5 CFR 575; 5 CFR 591.104; 5 CFR 630; 5 CFR 9701; 5 CFR 9901.	Mandatory	Shared Service Center			
LTC005	OPM		Support administration of special rates IAW 5 USC and 5 CFR 530 Subpart C.	Mandatory	Shared Service Center/Agency			
LTC006	OPM		Support the administration of repayment of student loans IAW 5 CFR 537.108 and 5 CFR 430 Subpart B.	Mandatory	Shared Service Center/Agency			
LTC007	OPM		Support the administration of allowances IAW 5 CFR 591 subpart C; 5 USC Chapter 59 or other applicable laws rules regulations and guidelines.	Mandatory	Shared Service Center/Agency			
LTC007.01	Functional		Support the administration of allowances IAW 5 CFR 591 subpart C; 5 USC Chapter 59, Subchapter I and 5948; 5 CFR 591, subparts B and C; 591.103-104, 591, subpart A and 595.106 or other applicable laws rules regulations and guidelines.	Mandatory	Shared Service Center			
LTC008	OPM		Support leave administration IAW 5 USC Chapter 63 5 CFR 630 and other applicable laws regulations and guidelines relating to alternative leave system.	Mandatory	Shared Service Center/Agency			
LTC009	OPM		Provide support for alternative compensation systems that vary from OPM-administered core systems IAW applicable laws rules regulations and guidelines.	Mandatory	Shared Service Center/Agency			
LTC009.01	Functional		Provide support for alternative compensation systems that vary from OPM-administered core systems IAW applicable laws rules regulations and guidelines and 5 USC Ch 47, 95, 97 and 99; 38 USC; 42 USC; 5 CFR 470.317; 5 CFR Parts 9701 and 9901; HCAAF Section IV: Pay for Performance, page IV-22 (Sept 2005); Financial Institutions Reform, Recovery and Enforcement Act (FIRREA).	Mandatory	Shared Service Center			
LTC010	OPM		Provide support for market-based pay surveys IAW applicable laws rules regulations and guidelines.	Optional	Shared Service Center/Agency			
LTC010.01	Functional		Provide support for market-based pay surveys IAW applicable laws rules regulations and guidelines and 5 USC Ch 47 and 95; 38 USC; 5 USC 5341; 5 CFR 532, subpart B; 5 CFR Chapter XCIX and Part 9901 (NSPS); 5 CFR Chapter XCVII and Part 9701 (DHS); Federal Wage System Operating Manuals.	Optional	Shared Service Center			
LTC011	OPM		Support the implementation of corrective actions IAW applicable laws rules regulations and guidelines.	Mandatory	Shared Service Center/Agency			
LTC011.01	Functional		Support the implementation of corrective actions IAW applicable laws rules regulations and guidelines and 5 USC, Ch 47, 95, 97, and 99; 38 USC; 42 USC; 5 CFR, Parts 451, 530, 531, 532, 534, 536, 537, 550, 551, 553, 575, 576, 581, 582, 591, 595, 610, 630, 9701 and 9901.	Mandatory	Shared Service Center			
LTC012	OPM		Support compensation program implementation IAW 5 CFR and 5 USC.	Mandatory	Shared Service Center/Agency			
LTC012.01	Functional		Support compensation program implementation IAW 5 CFR and 5 USC, Ch 31, 33, 41, 45, 53, 57 (subchapter IV), 59, 61, 63, 75, 97, and 99; 38 USC; 5 CFR Parts 451, 9701, 9901; HCAAF Section IV: Awards, page IV-19 (Sept 2005).	Mandatory	Shared Service Center			
LTC013	OPM		Support compensation program development IAW 5 CFR and 5 USC.	Mandatory	Shared Service Center/Agency			
LTC013.01	Functional		Support compensation program development IAW 5 CFR and 5 USC, Ch 31, 33, 41, 45, 53, 57 (subchapter IV), 59, 61, 63, 75, 97, and 99; 38 USC; 5 CFR Parts 451, 9701 and 9901; HCAAF Section IV: Awards, page IV-19 (Sept 2005).	Mandatory	Shared Service Center			
LTC014	OPM		Provide training on compensation management IAW applicable laws rules regulations and guidelines.	Optional	Shared Service Center/Agency			
LTC015	OPM		Support agency award programs IAW 5 CFR 451 subpart A and other applicable laws rules regulations and guidelines.	Mandatory	Shared Service Center/Agency			
LTC016	OPM		Support the administration of differentials IAW 5 USC Chapter 59 and 5 CFR Chapter 575 and other applicable laws rules regulations and guidelines.	Mandatory	Shared Service Center/Agency			
LTC016.01	Functional		Support the administration of differentials IAW 5 USC Chapter 59 and 5 CFR Chapter 575 and other applicable laws rules regulations and guidelines,IAW Primary Reference: 5 USC, Ch 59; 5 CFR 575.	Mandatory	Shared Service Center			
LTC017	OPM		Support reporting requirements IAW applicable laws rules regulations and guidelines.	Mandatory	Shared Service Center/Agency			
LTC017.01	Functional		Support reporting requirements IAW applicable laws rules regulations and guidelines, IAW Primary References: 38 USC; 5 CFR 451.106; 5 CFR 430.405; 5 CFR 531.413; 5 CFR 531.507; 5 CFR 534.405; 5 CFR 575.407; 5 CFR 591.104; 5 CFR 630.408; 5 CFR 630.1012; 5 CFR 630.1211; 5 CFR 9701 and 9901; OPM Operating Manual, Federal Workforce Reporting Systems.	Mandatory	Shared Service Center			
LTC018	OPM		Provide support for communication strategies of compensation policies IAW laws regulations rules and guidelines.	Optional	Shared Service Center/Agency			
LTC018.01	Functional		Provide support for communication strategies of compensation policies IAW laws regulations rules and guidelines, IAW Primary References: Reference: 5 USC Ch 47, 95, 97, and 99; 38 USC; 5 USC 301; 5 CFR Parts 9701 and 9901; 5 CFR 610.305; HCAAF Section IV: Pay for Performance, page IV-22 (Nov 2005); Washington, DC, Area Dismissal or Closure Procedures CPM (Nov 2005); Federal Executive Boards (FEBs) guidelines.	Optional	Shared Service Center			
LTC019	OPM		Subscribe to applicable OPM policy listservs through the OPM website.	Optional	Shared Service Center/Agency			
					TOTAL			

Requirement Number	Requirement Type	Non-Functional Type	Description	Mandatory / Optional	Who	In The Box	Extension	Customization
GORGP001	Functional		The solution shall allow reporting lines and other hierarchical relationships among organizations within the enterprise or business group.	Mandatory	Shared Service Center			
GORGP002	Functional		The solution shall provide the capability to capture hierarchical reporting lines (employee to supervisor) and other hierarchical relationships among organizations within the enterprise or business group.	Mandatory	Shared Service Center			
GORGP003	Functional		The solution shall enforce Organization Structure Descriptions to be hierarchical 6 levels, with a limit of 38 alpha-numeric positions, with no missing levels through the lowest level.	Mandatory	Shared Service Center			
GORGP004	Functional		The solution shall enforce Organization Structure Descriptions (ORG STRUCTURE) to have up to six hierarchical levels.	Mandatory	Shared Service Center			
GORGP005	Functional		The solution shall enforce Organization Structure Descriptions (ORG STRUCTURE) to have a limit of 38 alpha-numeric positions.	Mandatory	Shared Service Center			
GORGP006	Functional		The solution shall capture the legal authority and/or remarks code as to the reason/approval for the Organization Code to be changed or abolished. e.g. ADM 5440-XXX.	Mandatory	Shared Service Center			
GORGP007	Functional		The solution shall capture the GSA ADM 5440-XXX Unique Legal Authority and/or remarks code as to the reason/approval for the Organization Code to be changed or abolished.	Mandatory	Shared Service Center			
GORGP008	Functional		The solution shall have the ability to perform mass re-alignments.	Mandatory	Shared Service Center			
GORGP009	Functional		The solution shall enable user (PERSONNELIST) with the ability to perform mass re-alignments.	Mandatory	Shared Service Center			
GORGP010	Functional		The solution shall enable user (PERSONNELIST) to select/deselect specific employees from a system provided organizational mass list.	Mandatory	Shared Service Center			
GORGP011	Functional		The solution shall enable user (PERSONNELIST) to implement mass re-alignment for selected positions (leaving unselected remaining positions intact).	Mandatory	Shared Service Center			
GORGP012	Functional		The solution shall provide a dashboard for user (PERSONNELIST) to monitor (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) progress (status) completing required forms (unopened, opened, in progress, complete).	Mandatory	Shared Service Center			
GORGP013	Functional		The solution shall provide a dashboard that shows re-alignment process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Mandatory	Shared Service Center			
GORGP014	Functional		The solution shall contain a dashboard displays which must be customized to meet the needs of the user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center			
GORGP015	Functional		The solution shall have the ability to copy an existing Organization hierarchy in order to establish new or make changes to an existing one.	Mandatory	Shared Service Center			
GORGP016	Functional		The solution shall enable the user (PERSONNELIST) to copy (replicate) an existing organizational hierarchy. (Purpose is to enable user (PERSONNELIST) to be able to establish a new organization by copying an existing organization that is similar and then making manual modifications instead of starting from scratch.)	Mandatory	Shared Service Center			
GORGP017	Functional		The solution shall have the capability to represent the whole enterprise with the following features.Organization Information, Site Locations, Classification	Mandatory	Shared Service Center			
GORGP018	Functional		The solution shall have the capability to represent the entire enterprise, including the following areas:Organizational Information, geographical Site information, and classification information.	Mandatory	Shared Service Center			
GORGP019	Functional		The solution shall have the capability for users to configure constraints/business rules based on prescribed HR rules.Below are few examples of business rules that must be enforced: - The Effective Dates of the Organization represents the organization is active or inactive- Organization classifications can be enabled or disabled- The system shall enforce Office Symbols to remain unique, i.e. 'C' - The system shall allow Organization Code to be Unique.- Historical Organization Codes cannot be modified- Allows 'Location' information same as Duty Station Code	Mandatory	Shared Service Center			
GORGP020	Functional		The solution shall enable users (PERSONNELISTS and HR IT SPECIALISTS) to configure constraints/business rules based on prescribed HR rules.	Mandatory	Shared Service Center			
GORGP021	Functional		The solution shall enable the user (PERSONNELIST) to ensure Effective Dates of the Organization represent whether an organization is active or inactive	Mandatory	Shared Service Center			
GORGP022	Functional		The solution shall enable user (PERSONNELIST) to enable or disable Organization Classifications	Mandatory	Shared Service Center			
GORGP023	Functional		The solution shall ensure that the entity for office symbols (OFFICE SYMBOL) and the associated attributes are unique for all offices.	Mandatory	Shared Service Center			
GORGP024	Functional		The solution shall ensure that the entity for organization codes (ORG CODES) and the associated attributes are unique for all organizations.	Mandatory	Shared Service Center			
GORGP025	Functional		The solution shall ensure that the entity for historical organization codes (HISTORICAL ORG CODES) and the associated attributes cannot be overwritten or modified.	Mandatory	Shared Service Center			
GORGP026	Functional		The solution shall enable the user (PERSONNELIST) to automatically or manually synchronize "location" information with duty station code.	Mandatory	Shared Service Center			
GORGP027	Functional		The solution shall maintain historical Organizational tables (Organization and Organization Hierarchy) in order to research and provide quick inquiry responses based on the GSA retention policy.	Mandatory	Shared Service Center			
GORGP028	Functional		The solution shall maintain user (PERSONNELIST) access to historical Organizational Tables (Organization and Organization Hierarchy).	Mandatory	Shared Service Center			
GORGP029	Functional		The solution shall notify CPC to process realignment SF-50s for employees when a new Org Code is created displaying the 'old' and 'new' Organization codes.	Optional	Shared Service Center			
GORGP030	Functional		The solution shall provide user (PERSONNELIST) an automated process to request CPC (PERSONNELIST) process realignment SF-50s for employees (EMPLOYEES) when a new Org Code is required.created displaying the 'old' and 'new' Organization codes.	Optional	Shared Service Center			
GORGP031	Functional		The solution shall provide user (PERSONNELIST) with an in system display showing employee transition from the "old" organization code to the "new" organization code.	Optional	Shared Service Center			
GORGP032	Functional		The solution shall enable the user (PERSONNELIST) to highlight and selectively remove unfunded positions that cannot or will not transfer as part of a reorganization process.	Mandatory	Shared Service Center			
GORGP033	Functional		The solution shall provide the user (PERSONNELIST) with a workflow process and data storage capability that allows user (PERSONNELIST) to recall removed positions so that user (MANAGER) can appropriately request re-validation of unfunded positions as part of post reorganization activities.	Mandatory	Shared Service Center			
GORGP034	Functional		The solution shall enable users (PERSONNELIST, MANAGER, and DIRECTOR) to access historical record pre and post transition organizational structures.	Mandatory	Shared Service Center			
GORGP035	Functional		The solution shall have the capability to manage identifying Positions that are “Obligated To” an Employee on a Temporary Promotion, or Positions that are encumbered by a “Detailee"	Mandatory	Shared Service Center			
GORGP036	Functional		The solution shall have the capability to identify Positions that are “Obligated To” an Employee on a Temporary Promotion, or Positions that are encumbered by a “Detailee"	Mandatory	Shared Service Center			
GORGP037	Functional		The solution shall provide mass re-alignment capability. (If a Supervisor is realigned, a methodology for all the subordinate employees to move with that supervisor is required.	Mandatory	Shared Service Center			
GORGP038	Functional		The solution shall have the capability to mass re-align positions when a Supervisor is moved to a different organization, a method to move all subordinate employees is required.	Mandatory	Shared Service Center			
GORGP039	Functional		The solution shall allow for reassigning the supervisor of a position to another supervisor within the organization.	Mandatory	Shared Service Center			
GORGP040	Functional		The solution shall have the capability to reassign a supervisor in a position to another supervisor within the organization.	Mandatory	Shared Service Center			
GORGP041	Functional		The solution shall allow for the re-use of existing positions for various position management related functions,using the same PCN:- the ability to change grade levels and promote against the same PCN; and- the ability for HR technicians to change a multitude of data if a PCN is vacant.	Mandatory	Shared Service Center			
GORGP042	Functional		The solution shall allow the ability to view historical position and individual information based on the effective dates of the transactions.	Optional	Shared Service Center			
GORGP043	Functional		The solution shall allow the ability to view historical position and individual information based on the effective dates of the transactions.	Optional	Shared Service Center			
GORGP044	Functional		The solution shall allow tracking of key position information elements(e.g. Organization, Hiring status, location, hiring information, Work Terms, Budgets)	Mandatory	Shared Service Center			
GORGP045	Non-functional	Integration	The solution shall provide real-time data, or at minimum, instantly display changes to the user to indicate real-time data changes.	Mandatory	Shared Service Center			
GORGP047	Functional		The solution shall contain required fields as determined by the agency.	Mandatory	Shared Service Center			
GORGP049	Functional		The solution shall provide prompts, directions, and error messages for critical fields to make sure the correct data is entered, while permitting a manual revision/override capability.	Optional	Shared Service Center			
GORGP050	Functional		The solution shall assign a unique Position Control Number (PCN) to every encumbered and approved vacant position.	Mandatory	Shared Service Center			
GORGP051	Functional		The solution shall provide manual override capability for the PCN assigned.	Mandatory	Shared Service Center			

GORGP052	Functional		The solution shall assign Position Control Number Indicators (PCN Indicators) using 5 options.(e.g. C - Current, D - Dual Occupancy, G - Career Ladder, R - Re-classification, and T - Temporary/Detail; other letters would be acceptable as indicators).	Mandatory	Shared Service Center
GORGP053	Functional		The solution shall automatically pre-populate entries into the Job Analysis Worksheet.	Optional	Shared Service Center
GORGP054	Functional		The solution shall have the ability to build position hierarchies to model reporting lines or other relationships within the agency, and must provide organizational hierarchy data in various optional selectable formats.	Mandatory	Shared Service Center
GORGP058	Functional		The solution shall have the ability to Date Track all the Information on employees and assignments using series, title and grade.	Mandatory	Shared Service Center
GORGP059	Functional		The solution shall have the ability to Date Track all the Information on employees compensation and benefits transactions.	Optional	Shared Service Center
GORGP060	Functional		The solution shall maintain capability to look at history as of a specified time period. The solution shall provide retroactive changes/corrections capability (ex: as of a specified time period) so that changes can be retroactively made in order to correct records.	Optional	Shared Service Center
GORGP061	Functional		The solution shall provide the ability to download data from multiple records via a manager's self-service view and extract data into a spreadsheet format.	Optional	Shared Service Center
GORGP062	Functional		The solution shall have the capability to query the position hierarchy by employee name, office symbol, PCN or SSN.	Mandatory	Shared Service Center
GORGP063	Non-functional	Technical Specification	The solution shall provide the ability to download data from multiple records via a manager's self-service view and extract data into a spreadsheet file.	Mandatory	Shared Service Center
~~GORGP065~~	~~Non-functional~~	~~Integration~~	~~The solution shall provide a real-time, bi-directional interface such that position hierarchy information can automate SF52 actions~~.	~~Optional~~	~~Shared Service Center~~
~~GORGP066~~	~~Non-functional~~	~~Integration~~	~~The solution shall provide full integration with the HR IT system and a position management system in order to eliminate duplicative manual entries~~.	~~Optional~~	~~Shared Service Center~~
GORGP067	Non-functional	Technical Specification	The solution shall provide web access capability to execute all position management actions.	Mandatory	Shared Service Center
GORGP068	Functional		The solution shall provide robust workforce planning capabilities.	Optional	Shared Service Center
GORGP069	Functional		The solution shall provide vacancy reporting with no duplicative, manual re-entries.	Optional	Shared Service Center
GORGP070	Non-functional	Integration	The solution shall provide capability for batch updates at selected intervals.	Optional	Shared Service Center
GORGP071	Functional		The solution shall provide an option to automatically move subordinates to a supervisor one level up, once a supervisor is removed. Currently GSA cannot process personnel actions without CPC manual movement of subordinates. The solution shall provide the following options:Option 1: move automatically. Option 2: Be able to select where individuals go.	Optional	Shared Service Center
GORGP072	Functional		The solution shall provide organizational mass realignment capability.	Optional	Shared Service Center
GORGP073	Functional		The solution shall purge/delete/eliminate records through an organized selectable process with the appropriate notifications for positions that are excess to requirements.	Optional	Shared Service Center
GORGP074	Functional		The solution shall provide position ID capability.	Mandatory	Shared Service Center
GORGP075	Non-functional	Integration	The solution shall provide data feeds to and from the system to report organizational hierarchy and position fulfillment information upon request.	Optional	Shared Service Center
GORGP076	Non-functional	Technical Specification	The solution shall prevent duplicate entries from being created.	Optional	Shared Service Center
GORGP077	Functional		The solution shall ensure all 12,000+ GSA employees and external agency employees (e.g., GSA OIG and Commissions and Boards employees) have completed PD's.	Optional	Shared Service Center
GORGP078	Functional		The solution shall provide notifications for missing items or outdated information as a result of position or personnel movement.	Optional	Shared Service Center
GORGP079	Non-functional	Security	The solution shall provide access to position management functionality by user role. Each role must be provided access based on managerial or administrative requirements (supervisor, administrator, manager, individual employee etc.)	Mandatory	Shared Service Center
GORGP082	Functional		The solution shall provide automated internal management of access authorizations in lieu of email process.	Optional	Shared Service Center
GORGP084	Non-functional	Technical Specification	The solution shall automatically generate a new "PD Record ID" whenever a new PD is created	Optional	Shared Service Center
ORGP001	OPM		Provide consultative support for the agency's organization design.	Optional	Shared Service Center
ORGP001.01	Functional		The solution shall enable users to have access to selectable views; Organization structure, position, name, funded, unfunded, occupational series.	Optional	Shared Service Center
ORGP001.02	Functional		The solution shall enable user (System Administrator) to control access to views by user role (employee, supervisor, manager, director, leadership, PERSONNELIST).	Optional	Shared Service Center
ORGP002	OPM		Provide administrative support for the agency's organization design (e.g. reports, functional charts, description of duties).	Optional	Shared Service Center
ORGP002.01	Functional		The solution shall enable users to have access to selectable views; Organization structure, position, name, funded, unfunded, occupational series.	Optional	Shared Service Center
ORGP002.02	Functional		The solution shall enable user (System Administrator) to control access to views by user role (employee, supervisor, manager, director, leadership, PERSONNELIST).	Optional	Shared Service Center
ORGP003	OPM		Comply with the Americans with Disabilities Act and the Rehabilitation Act of 1973 (as amended) standards and requirements.	Optional	Shared Service Center/Agency
ORGP003.01	Functional		Comply with the Americans with Disabilities Act and the Rehabilitation Act of 1973 (as amended) standards and requirements IAW Primary Reference: 42 USC 12111-12117, 12201-122211; 29 CFR Part 1630; Sections 501, 504, and 508 of the Rehabilitation Act of 1973, as amended (29 USC 791, 794d; 29 CFR 1614.203(b), 36 CFR Part 1194).	Optional	Shared Service Center
ORGP004	OPM		Provide data to agency personnel based on role.	Mandatory	Shared Service Center/Agency
ORGP004.01	Functional		The solution shall be capable of granting role-based access on the basis of a hierarchical organizational structure	Mandatory	Shared Service Center
ORGP004.02	Functional		The solution ensure access to all system data is limited IAW roles.	Mandatory	Shared Service Center
ORGP004.03	Functional		The solution shall support graphical reference interfaces (e.g. Organizational charts)	Mandatory	Shared Service Center
ORGP004.04	Functional		The solution shall structure self-service capabilities to provide users insight into the data and modules to which they have access	Mandatory	Shared Service Center
ORGP004.05	Functional		The solution shall clearly define roles for the user population, to include defining system and data access	Mandatory	Shared Service Center
ORGP004.06	Functional		The solution shall support automated workflows to ensure data is being provided to the correct roles at appropriate times	Optional	Shared Service Center
ORGP005	OPM		Provide data for analysis to appropriate personnel.	Mandatory	Shared Service Center/Agency
ORGP005.01	Functional		The solution shall provide organization and position data for analysis IAW role-based permissions	Mandatory	Shared Service Center
ORGP005.02	Functional		The solution shall provide workforce planning and projections data to select users (WORKFORCE PLANNERS, SUPERUSERS) for analysis IAW role-based permissions	Optional	Shared Service Center
ORGP005.03	Functional		The solution shall provide organizational and position data to select users (WORKFORCE PLANNERS) to support scenario planning IAW role-based permissions	Mandatory	Shared Service Center
ORGP005.04	Functional		The solution shall provide organizational and position data to select users (PERSONNELISTS, WORKFORCE PLANNERS, SUPERUSERS) to support organizational structure and efficiency analyses IAW role-based permissions	Mandatory	Shared Service Center
ORGP005.05	Functional		The solution shall provide position data to select users (PERSONNELISTS, SUPERUSERS) to support assessment of career progression (e.g. career ladders, competency alignment, promotion rates)	Optional	Shared Service Center
ORGP005.06	Functional		The solution shall provide organizational and position data to select users (PERSONNELISTS, WORKFORCE PLANNERS, SUPERUSERS) to support organizational assessment of occupational series (competencies, alignment, grade-levels, etc.) IAW role-based permissions	Mandatory	Shared Service Center
ORGP005.07	Functional		The solution shall support providing data to select users via visual data analytics (e.g. Tableau) as part of the self-service capability	Mandatory	Shared Service Center
ORGP006	OPM		Respond to ad hoc requests for information and assistance as necessary.	Optional	Shared Service Center/Agency
ORGP006.01	Functional		The solution shall be able to support responses to ad hoc requests for information and assistance as necessary.	Optional	Shared Service Center
ORGP006.02	Functional		The solution shall provide reports of ad hoc reports generated to select users (HR IT SPECIALISTS, SUPERUSERS) to support identification of potential "canned" reports	Optional	Shared Service Center

ORGP007	OPM		Limit access to employee data to appropriate personnel only.	Mandatory	Shared Service Center/Agency
ORGP007.01	Non-functional	Security	The solution shall enforce role-based permissions to limit access to employee data to appropriate personnel only	Mandatory	Shared Service Center
ORGP007.02	Non-functional	Security	The solution shall provide capability to limit access to employee personnel data by defined group (e.g. region, function)	Mandatory	Shared Service Center
ORGP007.03	Non-functional	Security	The solution shall provide capability to limit access to specific portions of employee personnel data (fields) by defined group (e.g. finance)	Mandatory	Shared Service Center
ORGP008	OPM		Release information in accordance with Freedom of Information Act/Privacy Act.	Mandatory	Shared Service Center/Agency
ORGP008.01	Functional		Release information in accordance with Freedom of Information Act/Privacy Act IAW Primary Reference: CFR 532.707; Chapter 99, NDAA of 2004.	Mandatory	Shared Service Center/Agency
ORGP009	OPM		Secure all employee data.	Mandatory	Shared Service Center/Agency
ORGP010	OPM		Submit requirements for Senior Executive Services (SES), Senior Level (SL), and Scientific or Professional (ST) position authorization (biennial or off-cycle) to OPM.	Optional	Shared Service Center/Agency
ORGP010.01	Functional		Submit requirements for Senior Executive Services (SES) Senior Level (SL) and Scientific or Professional (ST) position authorization (biennial or off-cycle) to OPM IAW Primary Reference: 5 USC 3133.	Optional	Shared Service Center
ORGP012.01	Functional		The solution shall provide user (PERSONNELIST, EMPLOYEE MANAGER, HR ADMINISTRATOR) with a streamlined workflow process to enable PERSONNELIST to be able to evaluate positions against OPM and agency standards.	Optional	Shared Service Center
ORGP012.02	Functional		The solution shall provide user (PERSONNELIST, EMPLOYEE MANAGER, HR ADMINISTRATOR) with a workflow capability for supervisory/managerial review of positions.	Optional	Shared Service Center
ORGP013.01	Functional		The solution shall provide user (PERSONNELIST) a streamlined workflow process to enable PERSONNELIST to coordinate supervisory review of competencies and qualifications.	Optional	Shared Service Center
ORGP013.02	Functional		The solution shall enable user (PERSONNELIST) to route forms for supervisory review/signature when required to user (EMPLOYEE, SUPERVISOR, DIRECTOR)	Optional	Shared Service Center
ORGP013.03	Functional		The solution shall enable user (EMPLOYEE, SUPERVISOR, DIRECTOR) to review/comment/approve/reject/disapprove tasks, competencies, and qualifications associated with positions document.	Optional	Shared Service Center
ORGP013.04	Functional		The solution shall enable user (EMPLOYEE, SUPERVISOR, DIRECTOR) to return completed forms to user (PERSONNELIST).	Optional	Shared Service Center
ORGP013.05	Functional		The solution shall provide user (PERSONNELIST) with a workflow capability for users (supervisory/managerial) review of tasks, competencies, and qualifications associated with positions.	Optional	Shared Service Center
ORGP013.06	Functional		The solution shall provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions) that is accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
ORGP014.01	Functional		The solution shall provide automated process for users (SUPERVISORS/MANAGERS) to appeal classification ratings. Appeal applications submissions must be fully automated in the system and must provide user (PERSONNELIST) with the ability to appropriately route appeals to classification specialists and supervisors for review.	Optional	Shared Service Center
ORGP014.02	Functional		The solution shall enable user (PERSONNELIST) to route appeals for review/signature when required to user (HR ADJUDICATOR).(System must provide a streamlined workflow process that provides automated status updates.)	Optional	Shared Service Center
ORGP014.03	Functional		The solution shall enable user (ADJUDICATOR, SUPERVISOR, DIRECTOR) to review/comment/approve/reject/disapprove appeal.	Optional	Shared Service Center
ORGP014.04	Functional		The solution shall enable user (ADJUDICATOR, SUPERVISOR, DIRECTOR) to return completed review of appeal to user (PERSONNELIST).	Optional	Shared Service Center
ORGP014.05	Functional		The solution shall provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (SUPERVISOR, DIRECTOR, ADJUDICATOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
ORGP014.06	Functional		The solution shall contain dashboard displays which must be customized to meet the needs of the user (SUPERVISOR, DIRECTOR, ADJUDICATOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
ORGP014.07	Functional		The solution shall enable HR System/Database Administrators to control access through designated role assignments for users (SUPERVISOR, DIRECTOR, ADJUDICATOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
ORGP015.01	Functional		The solution shall provide automated process for users (SUPERVISORS, EMPLOYEE MANAGERS) to prepare/submit position descriptions for classification review.	Optional	Shared Service Center
ORGP015.02	Functional		The solution shall enable user (PERSONNELIST) to route classification requests for review to user (HR CLASSIFIER).	Optional	Shared Service Center
ORGP015.03	Functional		The solution shall enable user (CLASSIFIER, SUPERVISOR, DIRECTOR) to review/comment/approve/reject/disapprove appeal.	Optional	Shared Service Center
ORGP015.04	Functional		The solution shall enable user (CLASSIFIER, SUPERVISOR, DIRECTOR) to return completed review of appeal to user (PERSONNELIST).	Optional	Shared Service Center
ORGP015.05	Functional		The solution shall provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (SUPERVISOR, DIRECTOR, CLASSIFIER, or OTHER PERSONNELIST).	Optional	Shared Service Center
ORGP015.06	Functional		The solution shall contain dashboard displays which must be customized to meet the needs of the user (SUPERVISOR, DIRECTOR, ADJUDICATOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
ORGP015.07	Functional		The solution shall enable HR System/Database Administrators to control access through designated role assignments for users (SUPERVISOR, DIRECTOR, CLASSIFIER, or OTHER PERSONNELIST).	Optional	Shared Service Center
ORGP015.08	Functional		The solution shall enable user (EMPLOYEE SUPERVISOR, PERSONNELIST, CLASSIFIER) the ability to compare sections of Position Descriptions.	Optional	Shared Service Center
ORGP017	OPM		Record the classification judgment.	Optional	Shared Service Center/Agency
ORGP018.01	Functional		The solution shall enable user (PERSONNELIST, EMPLOYEE MANAGER, EMPLOYEE DIRECTOR, HR ADMINISTRATOR) to view funded positions in real-time.	Optional	Shared Service Center
ORGP018.02	Functional		The solution shall provide a view in which the user (PERSONNELIST, EMPLOYEE MANAGER, EMPLOYEE DIRECTOR, HR ADMINISTRATOR) to view positions filled, vacancies, and status of vacancies.	Optional	Shared Service Center
ORGP018.03	Functional		The solution shall provide user (PERSONNELIST, EMPLOYEE MANAGER, EMPLOYEE DIRECTOR, HR ADMINISTRATOR) capability to view projected losses (projected vacancies) and projected fill actions for vacant positions.	Optional	Shared Service Center
ORGP019	OPM		Determine position requirements based on the agency's review of the inventory of positions.	Optional	Shared Service Center/Agency
ORGP019.01	Functional		Solution is for system to provide standardized process for users (EMPLOYEE MANAGERS, DIRECTORS, PERSONNELISTS, HR ADMINISTRATORS) to review inventory of positions.	Optional	Shared Service Center
ORGP019.02	Functional		Solution is to provide users (EMPLOYEE MANAGERS, DIRECTORS, PERSONNELISTS, HR ADMINISTRATORS) with an automated process to apply a qualitative and quantitative rating scale so that all positions can be reviewed (and appropriately weighted) on a universally accepted scale.	Optional	Shared Service Center
ORGP019.03	Functional		The solution shall provide users (EMPLOYEE MANAGERS, DIRECTORS, PERSONNELISTS, HR ADMINISTRATORS) with a centralized review capability that shows all positions reviewed and the status of the review.	Optional	Shared Service Center
ORGP020	OPM		Support pay banding.	Mandatory	Shared Service Center/Agency
ORGP020.01	Functional		The solution shall integrate all pay tables and pay plans used by GSA	Mandatory	Shared Service Center
ORGP021	OPM		Maintain the agency's inventory of positions to accommodate evolving organization competency needs and changes in laws regulations policies organizational design and technology.	Mandatory	Shared Service Center/Agency
ORGP021.02	Functional		Solution is to provide users (EMPLOYEE MANAGERS, DIRECTORS, PERSONNELISTS, HR ADMINISTRATORS) with an automated process to apply a qualitative and quantitative rating scale so that all positions can be reviewed (and appropriately weighted) on a universally accepted scale.	Mandatory	Shared Service Center
ORGP021.03	Functional		The solution shall provide users (EMPLOYEE MANAGERS, DIRECTORS, PERSONNELISTS, HR ADMINISTRATORS) with a centralized review capability that shows all positions reviewed and the status of the review.	Optional	Shared Service Center
ORGP021.04	Functional		The solution shall integrate all pay tables and pay plans used by current customers (e.g. NCUA, which uses unique pay tables)	Mandatory	Shared Service Center
ORGP021.05	Functional		The solution shall support summary reporting of pay bands	Mandatory	Shared Service Center
ORGP022	OPM		Align position data to the incumbent's data; when position data changes make the new data available in the employee's record.	Mandatory	Shared Service Center/Agency
ORGP022.01	Functional		The solution shall support aligning position data with the EMPLOYEE record data for incumbent personnel	Mandatory	Shared Service Center

ORGP022.02	Functional		The solution shall make available alterations to an EMPLOYEE'S record when the position data associated with the underlying position changes	Mandatory	Shared Service Center
ORGP022.03	Functional		The solution shall support review and acceptance by a defined party (SUPERVISOR, PERSONNELIST, SUPERUSER) of changes in an EMPLOYEE record driven by changes in position data	Mandatory	Shared Service Center
ORGP022.04	Functional		The solution shall provide reviewing users (PERSONNELIST, SUPERUSERS) with automated notifications when actions are awaiting their review	Optional	Shared Service Center
ORGP022.05	Functional		The solution shall support batch alterations to position data and EMPLOYEE records (e.g. for organizational realignments) by highly restricted users (SUPERUSERS)	Mandatory	Shared Service Center
ORGP022.06	Functional		The solution shall provide capability to track history of position data	Mandatory	Shared Service Center
ORGP023	OPM		Support multiple organization structures (e.g. hierarchy matrix project team).	Mandatory	Shared Service Center/Agency
ORGP023.01	Functional		The solution shall provide users with the ability to maintain records of organizational changes (reorganizations).	Mandatory	Shared Service Center
ORGP023.02	Functional		The solution shall enable user (PERSONNELIST) to integrate employees and contract personnel.	Mandatory	Shared Service Center
ORGP023.03	Functional		The solution shall support clear definition of jobs, experience, etc. associated with a pay band	Mandatory	Shared Service Center
ORGP023.04	Functional		The solution shall be capable of supporting varied definition of pay bands as necessary for different supported agencies	Mandatory	Shared Service Center
ORGP024	OPM		Track actual geographic location of jobs.	Mandatory	Shared Service Center/Agency
ORGP024.02	Functional		The solution shall be capable of generating summary reports by geographical location of positions	Mandatory	Shared Service Center
ORGP024.03	Functional		The solution shall restrict access to pay band data and reports by role, as required	Mandatory	Shared Service Center
ORGP025	OPM		Track positions by organization structure.	Mandatory	Shared Service Center/Agency
ORGP025.01	Functional		The solution shall support tracking of funded and unfunded positions by organization structure	Mandatory	Shared Service Center
ORGP025.02	Functional		The solution shall support reporting of funded and unfunded positions by organization structure	Mandatory	Shared Service Center
ORGP026	OPM		Capture position-related information.	Mandatory	Shared Service Center/Agency
ORGP027	OPM		Identify positions that should be deactivated or removed.	Mandatory	Shared Service Center/Agency
ORGP027.01	Functional		The solution shall support select users (PERSONNELISTS) in identifying positions that shall be potentially deactivated.	Mandatory	Shared Service Center
ORGP027.02	Functional		The solution shall support select users (PERSONNELISTS) in identifying positions that shall be potentially removed.	Mandatory	Shared Service Center
ORGP027.03	Functional		The solution shall support working with GSA to formalize and document the identification and removal process	Optional	Shared Service Center
ORGP027.04	Functional		The solution shall support working with GSA to implement the identification and removal process using an automated approach	Optional	Shared Service Center
ORGP028	OPM		Execute position data changes (e.g. amending, establishing, activating, reactivating, and deactivating positions).	Mandatory	Shared Service Center/Agency
ORGP029	OPM		Maintain position history.	Mandatory	Shared Service Center/Agency
ORGP029.01	Functional		Solution must enable user (PERSONNELIST) to be able to see the history of positions via Position Control Number (PCN).	Mandatory	Shared Service Center
ORGP029.02	Functional		Solution must enable user (PERSONNELIST) to be able to see position history and history of personnel who encumbered positions.	Mandatory	Shared Service Center
ORGP030	OPM		Capture position revisions.	Mandatory	Shared Service Center/Agency
ORGP030.01	Functional		The solution shall capture position revisions in an integrated position management environment	Mandatory	Shared Service Center
ORGP030.02	Functional		The solution shall support real time summary reporting of all position revisions in a set duration	Optional	Shared Service Center
ORGP031.01	Functional		The solution shall provide automated process for users (SUPERVISORS, EMPLOYEE MANAGERS) to prepare/submit position descriptions for classification review.	Optional	Shared Service Center
ORGP031.02	Functional		The solution shall enable user (PERSONNELIST) to route classification requests for review to user (HR CLASSIFIER).	Optional	Shared Service Center
ORGP031.03	Functional		The solution shall enable user (CLASSIFIER, SUPERVISOR, DIRECTOR) to review/comment/approve/reject/disapprove appeal.	Optional	Shared Service Center
ORGP031.04	Functional		The solution shall enable user (CLASSIFIER, SUPERVISOR, DIRECTOR) to return completed review of appeal to user (PERSONNELIST).	Optional	Shared Service Center
ORGP031.05	Functional		The solution shall provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (SUPERVISOR, DIRECTOR, CLASSIFIER, or OTHER PERSONNELIST).	Optional	Shared Service Center
ORGP031.06	Functional		The solution shall contain dashboard displays which must be customized to meet the needs of the user (SUPERVISOR, DIRECTOR, ADJUDICATOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
ORGP031.07	Functional		The solution shall enable HR System/Database Administrators to control access through designated role assignments for users (SUPERVISOR, DIRECTOR, CLASSIFIER, or OTHER PERSONNELIST).	Optional	Shared Service Center
ORGP031.08	Functional		The solution shall enable user (EMPLOYEE SUPERVISOR, PERSONNELIST, CLASSIFIER) the ability to compare sections of Position Descriptions.(This is for simplified capability for users (Supervisors/PERSONNELISTs/Classifiers) to compare and evaluate classification standards.)	Optional	Shared Service Center
ORGP046.01	Functional		The solution shall provide user (PERSONNELIST) with the ability to assemble and consolidate all sub-tasks and documents required to implement a retroactive action in a module.	Optional	Shared Service Center
ORGP046.02	Functional		The solution shall enable user (PERSONNELIST) to initiate retroactive module as an automated process, ensuring that all tasks are completed in a prescribed sequence.	Optional	Shared Service Center
ORGP046.03	Functional		The solution shall provide capability for user (PERSONNELIST) to access retroactive detailed information.	Optional	Shared Service Center
ORGP046.04	Functional		The solution shall provide capability for user (PERSONNELIST) to calculate pay for customers (EMPLOYEES) in order to implement retroactive pay and benefits actions.	Optional	Shared Service Center
ORGP046.05	Functional		The solution shall provide user with access to pay and benefits tables for the past 50 years. (PERSONNELIST needs to be able to reconstruct retroactive detailed pay and benefits.)	Optional	Shared Service Center
ORGP048.01	Functional		The solution shall provide user (PERSONNELIST) automated capability to implement required adjudication actions.	Optional	Shared Service Center
ORGP048.02	Functional		The solution shall enable user (PERSONNELIST) to manually implement pay actions upon receipt of an adjudication decision.	Optional	Shared Service Center
ORGP048.03	Functional		The solution shall enable user (PERSONNELIST) to implement actions in accordance with specified time/date intervals.	Optional	Shared Service Center
ORGP048.04	Functional		The solution shall enable user (PERSONNELIST) to automatically calculate pay (look-back) for specified time/date intervals.	Optional	Shared Service Center
ORGP051	OPM		Align positions to projects.	Optional	Shared Service Center/Agency
ORGP051.01	Functional		The solution shall enable user (SYSTEM ADMINISTRATOR) the ability to de-select/disable this alignment requirement.	Optional	Shared Service Center
ORGP051.02	Functional		The solution shall maintain position histories	Mandatory	Shared Service Center
ORGP051.03	Functional		The solution shall support summary reporting of position changes made in the system within a set time period	Mandatory	Shared Service Center
ORGP052	OPM		Align position to funding source.	Mandatory	Shared Service Center/Agency
ORGP052.01	Functional		The solution shall align personnel to payroll funding sources.	Mandatory	Shared Service Center
ORGP052.02	Functional		The solution shall integrate position and personnel data to the degree possible, so that corrections made to data in one module will be automatically populated to other impacted modules.	Mandatory	Shared Service Center
ORGP052.03	Functional		The solution shall automate data population and integration of position and personnel information throughout the system to limit duplicative entry.	Optional	Shared Service Center
ORGP052.04	Functional		The solution shall provide explanation of Appropriation (APPN) codes to assist the user in determining the correct code (e.g. "over-over"). APPN codes are numeric codes that identify the type of funds being used	Mandatory	Shared Service Center

ORGP052.05	Functional		The solution shall support an interface with Pegasys which allows data to be automatically verified. Pegasys is GSA's core financial system, which supports funds management (budget execution and purchasing), credit cards, accounts payable, disbursements, standard general ledger and reporting.	Mandatory	Shared Service Center
ORGP054	OPM		Track both funded and unfunded positions.	Mandatory	Shared Service Center/Agency
ORGP055	OPM		Track non-Federal positions (e.g. volunteers contractors).	Optional	Shared Service Center/Agency
ORGP055.01	Functional		The solution shall enable users (PERSONNELIST) to track contractor data (name, vendor name, type of contract, organization supported, GS mission owner/supervisor, duration of contract, COR, GSA Program Manager, Vendor POC, Vendor Program Manager).	Optional	Shared Service Center
ORGP055.02	Functional		The solution shall enable user (CONTRACTOR) to enter required data.	Optional	Shared Service Center
ORGP055.03	Functional		The solution shall provide user with automated review/approval process in the following sequence: 1. Vendor POC, 2. COR, and 3. GSA Program Manager.	Optional	Shared Service Center
ORGP055.04	Functional		The solution shall enable user (PERSONNELIST) to enter contractor and contractor position information to be reflected on organizational charts.	Optional	Shared Service Center
ORGP055.05	Functional		The solution shall provide capability for user reviews by GSA Program Manager, COR, Vendor POC and Vendor Program manager.	Optional	Shared Service Center
ORGP055.07	Functional		The solution shall add citizenship to the list of HR data elements that can be entered for employees.	Optional	Shared Service Center
ORGP056	OPM		Apply new or updated OPM position classification standards and/or classification guides to covered positions within 12 months of the date of issuance.	Optional	Shared Service Center/Agency
ORGP056.01	Functional		Apply new or updated OPM position classification standards and/or classification guides to covered positions within 12 months of the date of issuance IAW Primary Reference: 5 USC Chapter 51 Part III Subpart D Section 5107; OPM Memorandum for Chief Human Capital Officers, Change in Classification Implementation Policy, January 20, 2006; Guidance for Implementing New Classification Standards.	Optional	Shared Service Center
ORGP057	OPM		Use OPM's occupational series for CPDF or EHRI data submissions when agencies are not covered by the Governmentwide classification system in 5 USC.	Mandatory	Shared Service Center/Agency
ORGP057.01	Functional		Use OPM's occupational series for CPDF or EHRI data submissions when agencies are not covered by the Government wide classification system in 5 USC IAW Primary References: 5 USC Chapter 51 Part III Subpart D Section 5107; OPM Memorandum for Chief Human Capital Officers, Change in Classification Implementation Policy, January 20, 2006; Guidance for Implementing New Classification Standards.	Mandatory	Shared Service Center
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Requirement Number	Requirement Type	Non-Functional Type	Description	Mandatory / Optional	Who	In The Box	Extension	Customization
GPM001	Functional		The solution shall provide users (HR ADMINISTRATORS) with a defined customer service/incident resolution process with clearly defined and related performance metrics.	Optional	Shared Service Center			
GPM002	Non-functional	Technical Specification	Solution must contain a performance management system that allows for electronic signature by the employee and the manager.	Optional	Shared Service Center			
GPM003	Functional		The solution shall provide users (EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) with a performance management critical/non-critical element library	Optional	Shared Service Center			
GPM004	Functional		The solution shall have the capability to build performance templates for the various types and categories of employees (e.g. AFGE, NFFE excluding SES)	Mandatory	Shared Service Center			
GPM005	Functional		The solution shall allow configuration of one or more critical elements and associated measures for a performance plan	Mandatory	Shared Service Center			
GPM006	Functional		The solution shall allow configuration of one or more non-critical elements and associated measures for a performance plan.	Optional	Shared Service Center			
GPM007	Functional		The solution shall allow a alphanumeric appraisal value for performance reviews (e.g.1, 2, 3, 4, 5, NR/Not rated.). The system shall have the agility to enable supporting multiple alpha numeric ranges on performance elements (e.g. 1 to 5, NR, and any combination thereof) and multiple numerical ranges on performance ratings based on algorithms on a portfolio basis.	Mandatory	Shared Service Center			
GPM008	Functional		The solution shall have the capability to electronically/programmatically build a performance plan as per the GSA policy(e.g. Copy an existing Performance Plan, Build a new Performance Plan).	Mandatory	Shared Service Center			
GPM009	Functional		The solution shall support electronic/programmatic building of performance plans from templates associated with positions or career paths. This includes the ability to copy and paste into the data fields from sources external to the system. The system shall provide agility to establish parameters for establishment of weighted elements based upon GSA policy or business rules (e.g., supervisory elements total at least 40% of plan, elements linked to GSA goals total at least 40% of plan)	Mandatory	Shared Service Center			
GPM010	Functional		The solution shall enable auto-population of performance plan data fields IAW the data model, and shall support ability to edit empty and pre-populated fields IAW the data model.	Mandatory	Shared Service Center			
GPM011	Functional		The solution shall support multiple types of performance cycles/reviews within the system.The system shall support creation and association of multiple review timeframes or cycles on an organization-specific basis (e.g. associate one review cycle with OIG and a second to GSA -- enable Portfolio Management approach)	Mandatory	Shared Service Center			
GPM012	Non-functional	Integration	The solution shall integrate with HR System to add/update basic employee information to create an employee Performance Appraisal record (e.g. employee name, occupational series, grade, supervisor when onboarded into the Personnel system)The system shall provide an alerts capability to notify the employee, supervisor, and any relevant PERSONNELIST when change of underlying HR data shall drive a Performance Appraisal change or action.	Mandatory	Shared Service Center			
GPM013	Functional		The solution shall have the capability to systematically/programmatically grant or remove access according to the encumbered position's supervisory status code.	Mandatory	Shared Service Center			
GPM014	Functional		The solution must apply a Performance Appraisal Effective Date equivalent to the date the rating is final, but no later than the agency-established deadline for providing ratings of record. This date shall be appropriately shifted if the prior performance period is extended and the reason for the extension shall be captured in the system.	Mandatory	Shared Service Center			
GPM015	Functional		The solution must have flexibility to support changes to the CFR that may drive the performance appraisal period to start IAW a different business rule	Optional	Shared Service Center			
GPM016	Functional		The solution must have the capability to print and export the 'Performance Plan and Appraisal Record for Non-SES Management and Supervisory Associates'. & 'Performance Plan and Appraisal Record for Non-Supervisory Associates' and be flexible to print and export other records as determined by the agency. Printed copies shall match the electronic record in format.	Mandatory	Shared Service Center			
GPM017	Functional		The solution shall have the capability to enter/select data elements to capture performance appraisal related information IAW role-based access.(e.g. input ratings and comments for 1) mid-year performance appraisal, 2) annual performance appraisal, or 3) an interim performance appraisal)The system shall enable uploading of supplemental data to become part of record during all stages (enter/select/change) and by all roles approved to alter a □ record. The system shall enable positive association between documents uploaded and individual uploading them.	Mandatory	Shared Service Center			
GPM018	Functional		The solution shall have the capability to calculate summary ratings (IAW with the selected algorithm) based on the rating of the performance elements in accordance with the GSA policy. The system shall have agility to respond to future algorithms and policy changes.	Mandatory	Shared Service Center			
GPM019	Functional		The solution shall have the capability for the appraiser to change the 2nd level approver in the workflow. When no other 2nd-level supervisor information provided, the system shall default to the supervisor's supervisor. The system shall have the agility to accept future changes to business rules guiding selection of 2nd-level supervisors.	Mandatory	Shared Service Center			
GPM020	Functional		The solution must have the flexibility to change performance management workflow requirements (approval of performance plans, ratings, etc.) based upon changes in policies and business rules (e.g., HSSOs, RAs, and/or all SESs do not require second level review of performance plans or ratings of their direct reports)	Optional	Shared Service Center			
GPM021	Functional		The solution shall have the workflow capability for multiple levels of approvals based on certain criteria(e.g. summary rating of 2, 3, 4, can be approved and closed by 1st line manager Summary rating of 1 & 5 must be routed to 2nd level of manager The workflow shall be able to handle rejections and return for info scenarios within)	Mandatory	Shared Service Center			
GPM022	Non-functional	Integration	The solution shall have the capability to transmit employee performance ratings information to EHRI.	Mandatory	Shared Service Center			
GPM023	Non-functional	Integration	The solution shall have the capability to transmit appraisal information to Awards & Recognition system	Mandatory	Shared Service Center			
GPM024	Non-functional	Integration	The solution shall maintain the synchronization of employee, manager with HR system's Position Hierarchy	Mandatory	Shared Service Center			
GPM025	Functional		The solution shall have the capability to attach documents during the appraisal process (e.g. signed documents appraisal).	Mandatory	Shared Service Center			
GPM026	Non-functional	Security	The solution shall maintain the digital association between documents uploaded and the individual uploading for accountability	Mandatory	Shared Service Center			
GPM027	Non-functional	Technical Specification	The solution shall support digital signature indicating acceptance of new plans, mid-year reviews, and end-of-year rating reviews. When a user is unable to provide digital signature, system shall capture reason digital signature was not possible and move on to next stage in workflow process	Mandatory	Shared Service Center			
GPM028	Non-functional	Security	The solution shall support role based security to control access to system functions(e.g. System shall allow managers and admin support to create and manage the fiscal year performance plan for each of their employees.)	Mandatory	Shared Service Center			
GPM029	Functional		The solution shall have the capability to rectify errors through the front end application as appropriate with role based access.(e.g. An HR Admin has the capability/functions to update records)	Mandatory	Shared Service Center			
GPM030	Non-functional	Technical Specification	The solution shall have the capability to upload multiple employee appraisals through a spreadsheet. Once successfully loaded, the appraisals will go through the standard awards-approval process and adhere to GSA policy rules. The solution must have a capability to shut off this feature.	Mandatory	Shared Service Center			
GPM031	Functional		The solution shall have the capability to perform mass appraisals through batch process for entering and updating multiple employee performance appraisal information without using the spreadsheet	Mandatory	Shared Service Center			
GPM032	Functional		The solution shall capture and allow for the processing of non-monetary awards.	Optional	Shared Service Center			
GPM033	Functional		The solution shall have the capability for users to configure constraints/business rule based on the GSA policy guidance.Below are few examples of business rules that must be enforced: - The Effective Date of the Performance Award must be either the beginning date of the current pay period or the beginning date of the next pay period - There is an upper limit on the cash award amount per year per individual as defined by current GSA Policy. (e.g. 10% of the annual salary) - The upper limit for Time-Off Awards is 80 hours annually (please refer to the GSA policy document for latest limits) - Time-Off Awards are converted to dollars based upon the individual's annual salary - An employee can receive a limit of one individual performance award per year. - The Final Approver and the Approver for an award cannot be the same person. - The Award Initiator is permitted to delete an unapproved award.The system must be able to adjust to policy changes and/or negotiated agreements and/or business practices on an annual basis. The system must be adjustable for different user groups (e.g., the GSA OIG)	Mandatory	Shared Service Center			
GPM034	Functional		The solution shall provide the capability for mass uploads of awards. This includes the ability to process mass monetary or time off awards, as well as the corresponding NOAs, as an outside document (e.g., excel spreadsheet) is uploaded.	Mandatory	Shared Service Center			
GPM035	Functional		For each mass award upload, the solution shall contain a series of cross-edits and validations (e.g., ensuring the appropriate award is being processed, that a single individual is not being given two awards, and that the budget is appropriately aligned with the action and that sufficient funds are available for each transaction).	Mandatory	Shared Service Center			

GPM036	Functional		For each mass award upload, the workflows and cross-edits/validations will be fully automated.	Optional	Shared Service Center
GPM038	Functional		The solution shall have the capability to derive the employee's, manager's and final approver hierarchy from the HR system's position hierarchy. The system must contain a manual override with a designated alternate approver when necessary.	Mandatory	Shared Service Center
GPM039	Non-functional	Integration	The solution shall have the ability to integrate with the HR System, Financial System(s), and Time and Attendance System	Mandatory	Shared Service Center
GPM039.01	Functional		The solution shall have the ability to store and generate awards data in OPM SF-50 format for NOA's for awards	Mandatory	Shared Service Center
GPM040	Functional		The solution shall have the capability to track all monetary and non-monetary awards provided to employees during the appraisal cycle with visibility based on user roles	Optional	Shared Service Center
GPM041	Functional		The solution shall support the agency-established workflow processes for nominating and approving monetary awards. This includes integration with the financial system and routing SF-52s to the appropriate role based approvers	Optional	Shared Service Center
GPM042	Functional		The solution shall have the ability to autocalculate awards amounts based on business rules with the ability to override autocalculations by approvers with role-based access	Optional	Shared Service Center
GPM043	Functional		The solution shall support multiple award nominations (e.g. team awards)	Optional	Shared Service Center
GPM044	Functional		The solution shall have the capability to import top line organizational goals based upon position hierarchy	Optional	Shared Service Center
GPM045	Functional		The solution shall have the workflow capability for multiple levels of approvals of performance plan based on policy and business rules(The workflow shall be able to handle rejections and return for info scenarios within)	Optional	Shared Service Center
GPM046	Functional		The solution shall have the capability for modifying performance plans throughout the appraisal cycle. The system shall support the policy for minimum period of performance for providing a rating	Optional	Shared Service Center
GPM047	Functional		The solution shall support employee requests to colleagues and supervisors on ad-hoc or specific performance goals for general feedback.	Optional	Shared Service Center
GPM048	Functional		The solution shall have the capability for employees to provide a self assessment on each performance elementThe system shall consolidate all feedback sources available to the employee for use in preparing the self assessment	Optional	Shared Service Center
GPM049	Functional		The solution shall support the agency informal and formal dispute processes on all ratings provided to the employee	Optional	Shared Service Center
GPM050	Functional		The solution shall have the capability to provide off cycle ratings or record to support personnel decisions	Optional	Shared Service Center
GPM051	Functional		The solution shall have the capability to delete ratings of record under special circumstances	Optional	Shared Service Center
GPM052	Functional		The solution shall provide SUPERVISORs with ability to view EMPLOYEE goals as part of performance management	Mandatory	Shared Service Center
PM001	OPM		Monitor changes that could have an impact on employee performance management.	Mandatory	Shared Service Center/Agency
PM001.01	Functional		Monitor changes that could have an impact on employee performance management IAW 5 USC 43, 95, 97, 99; 5 CFR 430, 9701, 9901; HCAAF.	Mandatory	Shared Service Center
PM001.02	Functional		The solution shall have the agility to support response to CFR changes or changes driven by agency policy. The system shall be flexible enough to handle portfolio level changes for various performance programs (PBS, FAS, OIG)	Mandatory	Shared Service Center
PM002	OPM		Communicate changes to stakeholders that could have an impact on employee performance management.	Mandatory	Shared Service Center/Agency
PM002.01	Functional		Communicate changes to stakeholders that could have an impact on employee performance management IAW 5 USC 43, 97, 99; 5 CFR 430, 9701, 9901; HCAAF.	Mandatory	Shared Service Center
PM002.02	Functional		The solution shall provide a centralized, integrated capability to communicate changes to stakeholders that could have an impact on employee performance management. This shall include an integrated approach to reporting, dashboards, and analytic aggregates.	Mandatory	Shared Service Center
PM002.03	Functional		The solution shall provide automated messaging and notification support for supervisors.	Optional	Shared Service Center
PM002.04	Functional		The solution shall enable integrated messaging via a range of media (e.g. blogs, chatrooms and pulse surveys systems, email systems, feedback mechanisms).	Optional	Shared Service Center
PM004.02	Functional		The solution shall have the ability to adapt to the agency's performance management framework	Mandatory	Shared Service Center
PM005.02	Functional		The solution shall provide the capability to establish clear performance standards for each performance element.	Mandatory	Shared Service Center
PM005.03	Functional		The solution shall provide flexibility to establish a threshold of linking performance standards and elements to organizational goals.	Mandatory	Shared Service Center
PM005.04	Functional		The solution shall provide the ability to evaluate employees based upon the performance standards.	Mandatory	Shared Service Center
PM005.05	Functional		The solution shall provide the flexibility for the methodology used to calculate performance ratings based upon agency policy.	Mandatory	Shared Service Center
PM005.06	Functional		The solution shall provide for the ability to enter a narative justification for each performance element rating.	Mandatory	Shared Service Center
PM005.07	Functional		The solution shall provide the capability to provide sub-element measures and ratings.	Mandatory	Shared Service Center
PM006.02	Functional		The solution shall provide flexibility to make changes to system framework based upon policy and regulatory changes	Mandatory	Shared Service Center
PM007	OPM		Support the development of performance management systems for members of the SES IAW with 5 USC 4312-4314 and 5 CFR 430 subpart C.	Optional	Shared Service Center/Agency
PM007.01	Functional		Support the development of performance management systems for members of the SES IAW 5 USC 4312-4314; 5 CFR 430, subpart C; SES-PAAT; OPM Policy Document: "Multi-Rater Appraisals: What about Confidentiality and Personal Privacy?". This shall include other pay plans (e.g. SL) as necessary.	Mandatory	Shared Service Center
PM007.02	Functional		Support the development of performance appraisal programs for non-SES employees IAW applicable agency appraisal systems 5 CFR 430 subpart B and laws regulations policies and guidelines.	Mandatory	Shared Service Center
PM008	OPM		Support the development of performance appraisal systems for non-SES employees IAW 5 USC 4302 5 CFR 430 and other applicable laws regulations policies and guidelines.	Mandatory	Shared Service Center/Agency
PM008.01	Functional		Support the development of performance appraisal systems for non-SES employees IAW 5 USC 43, 97, 99; 5 CFR 430, 9701, 9901; HCAAF; OPM Policy Documents: ”System Audit Tool: Performance Appraisal Assessment Tool” (PAAT), and "Multi-Rater Appraisals: What about Confidentiality and Personal Privacy?" and other applicable laws regulations policies and guidelines.	Mandatory	Shared Service Center
PM008.02	Functional		The solution shall provide flexibility in providing a Performance Management framework based upon applicable GSA policy; this framework would be identified by a system indicator providing a performance appraisal program applicable to specific employees; reporting and analytics would also be dependent on the system indicator.	Mandatory	Shared Service Center
PM009	OPM		Support the development of performance appraisal programs for non-SES employees IAW applicable agency appraisal systems 5 CFR 430 subpart B and laws regulations policies and guidelines.	Mandatory	Shared Service Center/Agency
PM009.01	Functional		Support the development of performance appraisal programs for non-SES employees IAW applicable agency appraisal systems 5 USC 43, 97, 99; 5 CFR 430, 9701, 9901; HCAAF; OPM Policy Documents: ”System Audit Tool: Performance Appraisal Assessment Tool” (PAAT), and "Multi-Rater Appraisals: What about Confidentiality and Personal Privacy?" and laws regulations policies .and guidelines.	Mandatory	Shared Service Center
PM010	OPM		Maintain records related to performance appraisal system(s) and program(s) IAW 5 CFR 430.209.	Mandatory	Shared Service Center/Agency
PM010.01	Functional		Maintain records related to performance appraisal system(s) and program(s) IAW 5 USC 43, 97, 99; 5 CFR 430, 9701, 9901; 5 CFR 93.404; HCAAF; OPM Policy Document "Multi-Rater Appraisals: What about Confidentiality and Personal Privacy?".	Mandatory	Shared Service Center
PM010.02	Functional		Maintain records related to performance appraisal system(s) and program(s) IAW 5 CFR 430.209. The system shall provide a search capability, to include the ability to search for legacy/historic information. The system shall support various record formats.	Mandatory	Shared Service Center
PM011	OPM		Support the application for certification of the SES and/or senior professional appraisal system(s) IAW 5 CFR 430 subpart D and other applicable guidance.	Mandatory	Shared Service Center/Agency
PM011.01	Functional		Support the application for certification of the SES and/or senior professional appraisal system(s) IAW 55 CFR 430, subpart D; 5 USC 5307(d); SES-PAAT and other applicable guidance.	Optional	Shared Service Center
PM012	OPM		Provide data support for the SES and senior professional performance management system(s) IAW 5 CFR 430 subpart D and other applicable guidance.	Mandatory	Shared Service Center/Agency
PM012.01	Functional		Provide data support for the SES and senior professional performance management system(s) IAW 5 CFR 430, subpart D; 5 CFR 530.204; SES-PAAT and other applicable guidance.	Mandatory	Shared Service Center

PM012.02	Functional		The solution shall support both standardized and ad hoc reports related to SES and senior professionals.	Optional	Shared Service Center
PM012.04	Functional		The solutions shall support tracking of SES individuals under investigation, in order to report on award eligibility.	Optional	Shared Service Center
PM012.05	Functional		Provide both a quantitative and qualitative analysis capability. Provide centralized, integrated data. Provide robust trend analysis capability. This also includes completion report online (e.g., % & # in various stages of mid-year, end-of-year performance review cycle) and made available to managers and directors in a hierarchy (monitor completion stats in self-service); For OHRM, include ability to download all performance management data at the individual level for offline analytics	Optional	Shared Service Center
PM013.03	Functional		The system shall support processes and practices associated with training employees about the Performance Management system, to include supporting adjustments resulting from regulatory changes.	Mandatory	Shared Service Center
PM014.02	Functional		The solution shall provide capability to enable automatic alerts/notifications on the basis of pre-set calendar events.	Optional	Shared Service Center
PM014.03	Functional		The solution shall provide capability to build bank or boilerplate notification messages / communications.	Optional	Shared Service Center
PM014.04	Functional		The solution shall provide automated workflow-aligned communications (alerting individuals when something is expected or due, as well as completed by the prior individual in the workflow)	Optional	Shared Service Center
PM014.05	Functional		The solution shall provide mechanism for tracking communications sent, opened, and replied to	Optional	Shared Service Center
PM016.02	Functional		System shall provide data updates in real-time or near real time.	Mandatory	Shared Service Center
PM016.03	Functional		System shall provide ability to conduct data queries, and provide reports at defined intervals.	Mandatory	Shared Service Center
PM016.04	Functional		Querying, editing, and reporting shall be managed IAW role based access (to include users, managers, supervisors, leadership, administrators, and superusers).	Mandatory	Shared Service Center
PM016.05	Functional		The solution shall provide capability to create performance appraisal notifications (alerts) that are based on preset calendar intervals and required completion dates.	Mandatory	Shared Service Center
PM016.06	Functional		The solution shall have the ability to build and modify rules for the frequency of alerts.	Mandatory	Shared Service Center
PM016.07	Functional		The solution shall be able to provide notifications/alerts to supervisors/managers/leadership regarding status.	Mandatory	Shared Service Center
PM016.08	Functional		The solution shall be able to provide system notifications on missing/required items for completion.	Mandatory	Shared Service Center
PM016.09	Functional		The solution shall be able to associate a workflow to automated notices and status updates.	Mandatory	Shared Service Center
PM016.10	Functional		The solution shall provide capability to display information in dashboard accessible to users.	Mandatory	Shared Service Center
PM016.11	Functional		The solution shall automate process for departing personnel to the degree possible.	Mandatory	Shared Service Center
PM017	OPM		Maintain a performance appraisal system electronically in accordance with 5 USC 4302.	Optional	Shared Service Center/Agency
PM017.01	Functional		Maintain a performance appraisal system electronically in accordance with5 USC 4302(c), 95, 97, and 99; SES-PAAT; OPM Policy Documents: "System Audit Tool: Performance Appraisal Assessment Tool" (PAAT), and "Multi-Rater Appraisals: What about Confidentiality and Personal Privacy?".	Mandatory	Shared Service Center
PM019	OPM		Provide data support for the non-SES performance management system(s).	Mandatory	Shared Service Center/Agency
PM019.01	Non-functional	Technical Specification	Provide data support for the non-SES performance management system(s) IAW 5 USC 43, 95, 97, 99; 5 CFR 430, 9701, 9901; PAAT ; HCAAF.	Mandatory	Shared Service Center
PM019.02	Non-functional	Technical Specification	The solution shall track HR data and data related to HR actions, including performance evaluations, in order to support both standardized and ad hoc performance reports.	Mandatory	Shared Service Center
PM020	OPM		Support the development of employee performance plans IAW 5 CFR 430 and other applicable laws, regulations, policies, and guidelines.	Mandatory	Shared Service Center/Agency
PM020.01	Functional		Support the development of employee performance plans IAW 5 5 USC 43, 95, 97, 99; 5 CFR 430, 9701, 9901 and other applicable laws regulations policies and guidelines.	Mandatory	Shared Service Center
PM020.02	Functional		The solution shall provide automated, real-time checks visible to the user to ensure that weighting of elements being evaluated sum to 100%.	Mandatory	Shared Service Center
PM020.03	Functional		The solution shall demonstrate linkage of each performance element to agency goals and prevent the user from entering an element without linking it to a goal.	Mandatory	Shared Service Center
PM021.02	Functional		The solution shall provide support to SUPERVISORs during the performance management process in accordance with applicable laws regulations policies and guidelines.	Mandatory	Shared Service Center
PM021.03	Functional		The solution shall allow for varied periodicity of performance management cycles, in accordance with GSA established requirements.	Optional	Shared Service Center
PM021.04	Functional		The solution shall allow for variance in performance management rating scales, in accordance with GSA established requirements.	Optional	Shared Service Center
PM021.05	Functional		The solution shall allow for modification of performance management critical elements, in accordance with GSA established requirements.	Mandatory	Shared Service Center
PM022.02	Functional		The solution shall support assignment of performance appraisals to a Performance Review board and shall support reviewers being identified in the system.	Mandatory	Shared Service Center
PM022.03	Functional		The solution shall provide reviewers access to assigned performance plans and supporting documents. The system shall enable assignment of methodologies to assign reviewers to appropriate groups of individual records.	Mandatory	Shared Service Center
PM022.04	Functional		The solution shall provide ability to track status (e.g. completed, partially completed, not started) of performance review board members at the individual and aggregate level. The system shall provide dashboard capabilities (e.g. for status and actions).	Mandatory	Shared Service Center
PM022.05	Functional		The solution shall support analyses across reviewers and shall support analysis of reviews provide by each reviewer (to support identification and analysis of high/low scoring tendencies that relate more to the reviewer than the reviewed).	Mandatory	Shared Service Center
PM022.06	Functional		The system shall provide ability to support routine aggregate and ad hoc reports.	Mandatory	Shared Service Center
PM022.07	Functional		The solution shall provide an electronic signature capability for performance management purposes.	Mandatory	Shared Service Center
PM023	OPM		Report ratings of record data to the centralized data record; IAW OPM reporting requirements and standards.	Mandatory	Shared Service Center/Agency
PM023.01	Functional		Report ratings of record data to the centralized data record; IAW 5 USC 95, 97 and 99; 5 CFR 430.209.	Mandatory	Shared Service Center
PM023.02	Functional		The solution shall be capable of managing various types of ratings.	Mandatory	Shared Service Center
PM023.03	Functional		The system shall be capable of filtering records so that OPM receives just those ratings required by law (currently annual ratings of record).	Mandatory	Shared Service Center
PM023.04	Functional		System shall have agility to adjust reporting to OPM if policy or regulations change.	Mandatory	Shared Service Center
PM024.02	Functional		The solution shall provide the capability to manually transfer an employee's performance ratings (e.g. ratings of record any subsequent performance ratings) when an employee transfers to another agency or is assigned to another organization within the agency in compliance with 5 CFR 293 and OPM instruction. Transfer required data to eOPF	Mandatory	Shared Service Center
PM024.03	Functional		The solution shall automatically transfer an employee's performance ratings when employee transfers to another agency or is assigned to another organization within the agency in compliance with 5 CFR 293 and OPM instruction.	Mandatory	Shared Service Center
PM025	OPM		Support the submission of performance appraisal system(s) and program(s) documentation to OPM.	Mandatory	Shared Service Center/Agency
PM025.01	Non-functional	Integration	Support the submission of performance appraisal system(s) and program's) documentation to OPM through the integration with EHRI.	Mandatory	Shared Service Center
PM026	OPM		Support the development of performance standards.	Mandatory	Shared Service Center/Agency
PM026.01	Functional		Support the development of performance standards IAW 5 USC 43, 95, 97 and 99; 5 CFR 430.206 .	Mandatory	Shared Service Center
PM026.02	Functional		The solution shall enable entry and analysis of numerically-based performance standards	Optional	Shared Service Center
PM026.03	Functional		The solution shall provide the user with the ability to draw from a bank of existing plans for performance standards.	Optional	Shared Service Center
PM026.04	Functional		System shall have ability to create new performance plans from pre-existing templates.	Optional	Shared Service Center
PM026.05	Functional		The solution shall include easy-to-follow process/instructions, prompts as necessary, and drop-downs where applicable for creating and using templates.	Optional	Shared Service Center

PM026.06	Functional		The solution shall provide capability to tag and display status of activities IAW The Red/Yellow/Green scale as well as Section 508 compliant tags.	Optional	Shared Service Center
PM026.07	Functional		System shall have agility to support changes of performance standards rating range (e.g. change from 1-5 to 1-7), and automate population of rating descriptions from a bank.	Optional	Shared Service Center
PM026.08	Functional		Provide spell check capability throughout performance management system	Optional	Shared Service Center
PM027	OPM		Provide for employee goal and achievement tracking.	Mandatory	Shared Service Center/Agency
PM027.01	Functional		Provide for employee goal and achievement tracking IAW Performance Appraisal Assessment Tool (PAAT).	Mandatory	Shared Service Center
PM027.02	Functional		The solution shall support tracking of EMPLOYEE goals as part of performance management	Mandatory	Shared Service Center
PM027.03	Functional		The solution shall support tracking of EMPLOYEE achievements	Mandatory	Shared Service Center
PM027.04	Functional		The solution shall support clear association between EMPLOYEE goals and achievements tracked	Mandatory	Shared Service Center
PM028	OPM		Provide follow-up to ensure reviews are done.	Mandatory	Shared Service Center/Agency
PM028.01	Functional		Provide follow-up to ensure reviews are done IAW PAAT, SES-PAAT.	Mandatory	Shared Service Center
PM028.02	Functional		The solution shall support follow-up to ensure reviews are done, using an automated process that manages rating cycles.	Optional	Shared Service Center
PM028.03	Functional		The solution shall provide alerts / notifications capability as part of providing follow-up to ensure reviews are done.	Optional	Shared Service Center
PM028.04	Functional		The solution shall provide limited users (PERSONNELISTS, DIRECTORS, SUPERUSERS) the ability to generate summary reporting of performance reports by status (e.g. overdue performance reports)	Optional	Shared Service Center
PM028.05	Functional		The solution shall enable PERSONNELISTS to modify both content and business rules for alerts sent to EMPLOYEEs	Mandatory	Shared Service Center
PM028.06	Functional		The solution shall enable PERSONNELISTS to modify both content and business rules for alerts sent to SUPERVISORs	Mandatory	Shared Service Center
PM028.07	Functional		The solution shall enable PERSONNELIST oversight and monitoring of review progress	Mandatory	Shared Service Center
PM028.08	Functional		The solution shall enable SUPERVISORs oversight and monitoring of review progress	Mandatory	Shared Service Center
PM028.09	Functional		The solution shall support external oversight variations of performance review progress (such as the OIG schedule).	Mandatory	Shared Service Center
PM028.10	Functional		The solution shall be capable of providing limited users (PERSONNELISTS, DIRECTORS) with dashboard views of performance reports by status. Data included in dashboard reporting shall be restricted IAW role-based permissions	Optional	Shared Service Center
PM029	OPM		Support use of performance ratings to determine pay increases (e.g. pay for performance).	Mandatory	Shared Service Center/Agency
PM029.01	Functional		Support use of performance ratings to determine pay increases (e.g. pay for performance) IAW 5 USC 5382 95, 97 and 99; 5 CFR 534 subparts D and E.	Mandatory	Shared Service Center
PM029.02	Functional		The solution shall use an automated process to execute business rules as part of using performance ratings to determine pay increases.	Mandatory	Shared Service Center
PM029.03	Functional		The solution shall have the agility to support and implement changes to future business rules for associating performance ratings to pay increases	Mandatory	Shared Service Center
PM029.04	Functional		The solution shall leverage access controls while supporting use of performance ratings to determine pay increases.	Mandatory	Shared Service Center
PM029.05	Functional		The solution shall support the following business rule in the automated process: Within Grade Increases (WGI) require a minimum performance rating of 2 for the relevant period	Mandatory	Shared Service Center
PM029.06	Functional		The solution shall support the following business rule in the automated process: Quality Step Increases (QSI) require a performance rating of 5 for the relevant period, and no more than oneQSI can be given to any individual in a 12-month period	Mandatory	Shared Service Center
PM030	OPM		Track performance ratings by Demographics.	Mandatory	Shared Service Center/Agency
PM030.01	Functional		The solution shall support tracking performance ratings by EMPLOYEE Demographics.	Mandatory	Shared Service Center
PM030.02	Non-functional	Integration	The solution shall be capable of integrating with or providing an interface with an identified business intelligence system as part of tracking performance ratings by demographic.	Optional	Shared Service Center
PM030.03	Functional		The solution shall support reporting on performance ratings by EMPLOYEE demographics	Optional	Shared Service Center
PM030.04	Functional		The solution shall provide basic analytic support for trend analysis of performance ratings by EMPLOYEE demographics	Mandatory	Shared Service Center
PM031	OPM		Document employee coaching free-form comments.	Mandatory	Shared Service Center/Agency
PM031.01	Functional		The solution shall enable documentation of EMPLOYEE coaching free-form comments	Mandatory	Shared Service Center
PM031.02	Functional		The solution shall enable association between EMPLOYEE coaching documented and EMPLOYEE performance rating	Optional	Shared Service Center
PM031.03	Functional		The solution shall maintain association between coaching comments captured and user (SUPERVISOR) providing comments	Optional	Shared Service Center
PM032.01	Functional		The solution shall support recurring performance reviews in a variety of modifiable periodicities.	Mandatory	Shared Service Center
PM032.02	Functional		The solution shall be capable of integrating alerts / notifications into the recurring performance review cycles	Mandatory	Shared Service Center
PM032.03	Functional		The solution shall provide an automated workflow process to EMPLOYEEs and SUPERVISORs as part of supporting recurring performance reviews	Mandatory	Shared Service Center
PM033	OPM		Provide the capability to set appraisal cycle parameters.	Mandatory	Shared Service Center/Agency
PM033.01	Functional		The solution shall provide select users (SUPERUSERS) with the capability to set appraisal cycle parameters	Mandatory	Shared Service Center
PM033.02	Functional		The solution shall support setting and maintaining varied appraisal cycle parameters for different supported customers/agencies	Mandatory	Shared Service Center
PM034	OPM		Support the development of guidelines for measuring performance against identified expectations.	Mandatory	Shared Service Center/Agency
PM035	OPM		Track performance progress.	Mandatory	Shared Service Center/Agency
PM035.01	Functional		The solution shall support tracking of performance progress for supported EMPLOYEEs	Mandatory	Shared Service Center
PM036	OPM		Use automated workflow to support the performance management process.	Mandatory	Shared Service Center/Agency
PM036.01	Functional		The solution shall be capable of easily integrating changes to the performance management process resulting from re-design of the GSA performance management system.	Mandatory	Shared Service Center
PM036.02	Functional		The solution shall be able to support establishment of approval schedules.	Mandatory	Shared Service Center
PM037	OPM		Archive performance management information.	Mandatory	Shared Service Center/Agency
PM037.01	Non-functional	Technical Specification	The solution shall archive performance management information and provide current year plus three year lookback.	Mandatory	Shared Service Center
PM038	OPM		Provide the capability to capture employee input and document employee accomplishments online.	Mandatory	Shared Service Center/Agency
PM038.01	Functional		The solution shall provide the capability to capture EMPLOYEE input in the performance management system.	Mandatory	Shared Service Center
PM038.02	Functional		The solution shall provide the capability to document EMPLOYEE accomplishments online.	Mandatory	Shared Service Center
PM038.03	Functional		The solution shall provide EMPLOYEE ability to document accomplishments throughout the rating cycle	Mandatory	Shared Service Center
PM038.04	Functional		The solution shall provide SUPERVISOR ability to document input and accomplishments throughout the rating cycle	Mandatory	Shared Service Center
PM039	OPM		Notify individuals of performance management events.	Mandatory	Shared Service Center/Agency
PM039.01	Functional		The solution shall notify individuals (EMPLOYEE, SUPERVISOR, PERSONNELIST) of performance management events.	Mandatory	Shared Service Center
PM039.02	Functional		The solution shall provide automated workflow processes capability, to support streamlined notification of performance management events	Optional	Shared Service Center

PM039.03	Functional		The solution shall provide integration of alerts / notifications into automated workflow processes, to support streamlined notification of performance management events	Optional	Shared Service Center
PM040	OPM		Provide access to electronic information files on performance management including policies guidelines and forms.	Mandatory	Shared Service Center/Agency
PM040.01	Functional		Provide access to electronic information files on performance management including policies guidelines and forms IAW 5 USC 95, 97 and 99; 5 CFR 430.209(f).	Mandatory	Shared Service Center
PM040.02	Functional		The solution shall provide users (EMPLOYEE, SUPERVISOR, PERSONNELIST) with access to electronic information files on performance management including policies, guidelines, and forms.	Mandatory	Shared Service Center
PM040.03	Functional		The solution shall enable users (EMPLOYEE, SUPERVISOR, PERSONNELIST) to be able to download electronic information files on performance management including policies, guidelines, and forms.	Mandatory	Shared Service Center
PM042.01	Functional		The solution shall provide SUPERVISORS with automated support for the evaluation of EMPLOYEE performance management.	Mandatory	Shared Service Center
PM042.02	Functional		The solution shall provide PERSONNELISTS with automated support for review and evaluation of EMPLOYEE performance management.	Mandatory	Shared Service Center
PM042.03	Functional		The solution shall provide limited users (PERSONNELISTS, SUPERUSERS) with automated support for review and evaluation of performance management across organizations and functions.	Mandatory	Shared Service Center
PM043	OPM		Make performance management appraisal information available to other HR systems.	Mandatory	Shared Service Center/Agency
PM043.01	Non-functional	Integration	The solution shall support providing interfaces to make performance management appraisal information available to other HR systems.	Mandatory	Shared Service Center
PM043.02	Non-functional	Integration	The solution shall support processing of performance awards based on business rules provided by the supported agency	Mandatory	Shared Service Center
					TOTAL

Requirement Number	Requirement Type	Non-Functional Type	Description	Mandatory / Optional	Who	In The Box	Extension	Customization
GPPA001	Non-functional	Technical Specification	The solution shall contain an Image and document storage system which provides seamless integration to HR, Payroll and T&A Systems	Optional	Shared Service Center			
GPPA002	Non-functional	Technical Specification	The solution shall ensure information/data in the system is accessible to users.	Optional	Shared Service Center			
GPPA003	Non-functional	Technical Specification	The solution shall ensure image and storage system is fully integrated between HR and Payroll (in a single fully integrated system/repository).	Optional	Shared Service Center			
GPPA004	Functional		The solution shall support the ability for users (PERSONNELISTS) to filter and sort images/documents (by name, address, organization, grade, social security number)	Optional	Shared Service Center			
GPPA005	Non-functional	Integration	The solution shall have ability to integrate in real-time with GSA's legacy systems.	Optional	Shared Service Center			
~~GPPA006~~	~~Functional~~		~~The solution shall provide the user (PERSONNELIST) with the capability to manually enter information directly into payroll in the case of court ordered settlements where HR actions do not necessarily correlate to the payroll action requested~~.	~~Optional~~	~~Shared Service Center~~			
GPPA007	Functional		The solution shall provide the capability for users (PERSONNELISTS) to enable and manage temporary promotions for EMPLOYEES.	Optional	Shared Service Center			
GPPA008	Functional		The solution shall provide the capability for users (PERSONNELISTS) to track position control numbers (PCNs) for EMPLOYEES who are authorized temporary promotions.	Optional	Shared Service Center			
GPPA009	Functional		The solution shall enable user (PERSONNELIST) to manage detail assignment process for eligible employees.	Mandatory	Shared Service Center			
GPPA010	Functional		The solution shall provide capability for the user (PERSONNELIST) to manage employees in detail status by aligning them to separate (temporary) position control numbers while keeping their permanent (current) position control number intact/reserved.	Mandatory	Shared Service Center			
GPPA011	Functional		The solution shall enable user (PERSONNELIST) to specify and renew (modify) detail periods upon expiration.	Mandatory	Shared Service Center			
GPPA012	Functional		The solution shall enable user (PERSONNELIST) to assign the appropriate supervisory chain for the detailed employee as part of the detail assignment process.	Mandatory	Shared Service Center			
GPPA013	Functional		The solution shall provide notification and get electronic agreement from both the permanent (EMPLOYEE MANAGER) and detailed (EMPLOYEE MANAGER) supervisory chain that identifies the appropriate employee supervisory chain.	Mandatory	Shared Service Center			
GPPA014	Functional		The solution shall provide capability for the user (PERSONNELIST) to continuously monitor/manage/access/confirm supervisory chain for detailed employees.	Mandatory	Shared Service Center			
GPPA015	Functional		The solution shall provide capability for the user (PERSONNELIST) to ensure/confirm "ownership" of supervisory responsibilities with detailees' supervisory chain (ensures detailed employees are supervised and performance appraisals are appropriately completed)	Optional	Shared Service Center			
GPPA016	Functional		The solution shall generate notifications (alerts) to users (PERSONNELIST, EMPLOYEE, EMPLOYEE MANAGER) to confirm status of detailed employee and provide updates regarding time remaining (DAYS) on detailed assignment.	Optional	Shared Service Center			
GPPA017	Functional		The solution shall provide capability for the user (PERSONNELIST) to automatically assign performance appraisal responsibilities to the assigned user (EMPLOYEE MANAGER)	Optional	Shared Service Center			
GPPA018	Functional		The solution shall provide users (EMPLOYEES, EMPLOYEE MANAGERS, EMPLOYEE DIRECTORS, PERSONNELISTS, HR ADMINISTRATORS, SUPPORTING INTERNAL OFFICES) HR notifications (Alerts, Advisories, Prompts, System Notifications) to be defined and categorized in the system.	Optional	Shared Service Center			
GPPA019	Functional		The solution shall provide users (EMPLOYEES, EMPLOYEE MANAGERS, EMPLOYEE DIRECTORS, PERSONNELISTS, HR ADMINISTRATORS, HR IT SPECIALISTS, HR IT ADMINISTRATORS) a centralized location (repository) to store and access specified HR notifications (Alerts, Advisories, Prompts, System Notifications) for management and reporting.	Optional	Shared Service Center			
GPPA020	Functional		The solution shall provide users (PERSONNELISTS and HR ADMINISTRATORS the ability to specify (standardize) HR notifications (alerts/advisories/prompts) according to user (PERSONNELIST) desired requirements	Optional	Shared Service Center			
GPPA021	Functional		The solution shall provide users (PERSONNELISTS and HR ADMINISTRATORS the ability to modify (manually) all automated notifications sort and route HR notifications (alerts/advisories/prompts) according to associated activities, urgency levels and defined managerial roles.	Optional	Shared Service Center			
GPPA022	Functional		The solution shall provide capability for users (PERSONNELISTS and HR ADMINISTRATORS) to customize and modify notifications (Alerts, Advisories, Prompts, System Notifications) as required.	Optional	Shared Service Center			
GPPA023	Functional		The solution shall provide user (HR IT SPECIALIST) access to a centralized system location to manage standardized notifications (alerts, prompts, advisories) to users (EMPLOYEES) for all HR actions.	Optional	Shared Service Center			
GPPA024	Functional		The solution shall provide user (HR IT SPECIALIST) ability to assign business rules which link notifications (alerts, prompts, advisories) to specific HR actions so that when a user (PERSONNELIST) initiates a specific personnel action, the notifications are built into the required action (in accordance with the user specified business rules associated with the action).	Optional	Shared Service Center			
GPPA025	Functional		The solution shall allow user (PERSONNELIST) to add or manually modify notifications (alerts, prompts, advisories) from a list of notification options when initiating HR actions.	Optional	Shared Service Center			
GPPA026	Functional		At selectable automated intervals, the solution shall remind (or-notify) user (EMPLOYEE) of required action if the user (EMPLOYEE) is non-responsive.	Optional	Shared Service Center			
GPPA027	Functional		The solution shall provide user (EMPLOYEE) with access to notifications (alerts, prompts, advisories) received.	Optional	Shared Service Center			
GPPA028	Functional		The solution shall provide user (SUPERVISOR) access to existing and past notifications (alerts, prompts, advisories) provided to all subordinate employees.	Optional	Shared Service Center			
GPPA029	Functional		The solution shall provide user (SUPERVISOR) with routine reports showing notifications (alerts, prompts, advisories) provided to subordinate employees (user selectable option).	Optional	Shared Service Center			
GPPA030	Functional		The solution shall enable user (PERSONNELIST) with the ability to review notifications sent and the status of the required actions in a single file.	Optional	Shared Service Center			
GPPA031	Functional		Solution will provide user (PERSONNELIST) updates to actions completed and notifications provided to users (EMPLOYEES) in real time or near real-time.	Optional	Shared Service Center			
GPPA032	Functional		Solution must generate email notifications of completed processes.	Optional	Shared Service Center			
GPPA033	Functional		The solution must generate email notifications to specified Customer contacts upon completion of specified system processes such as nightly batch updates, imports of 3rd Party data, execution of the Pay process, execution of the T&A process, etc.	Optional	Shared Service Center			
GPPA034	Functional		Solution must resolve conflicts generated by conflicting or intervening actions through system logic with automated notifications of completed actions.	Optional	Shared Service Center			
GPPA035	Functional		The solution shall provide users (PERSONNELISTS, and HR ADMINISTRATORS) with automated warnings of potential guidance conflicts before automated instructions are issued to customers (EMPLOYEES).	Optional	Shared Service Center			
GPPA036	Functional		The solution shall provide user (PERSONNELIST) with a set of questions or logic analysis to ensure employee is "qualified" for the action being implemented.	Optional	Shared Service Center			
GPPA037	Functional		The solution shall enable user (PERSONNELIST, HR IT SPECIALIST) to build in the appropriate logic and notifications (must be modifiable).	Optional	Shared Service Center			
GPPA038	Functional		Solution must have intuition to pull up all required sub-actions when an HR action is requested.	Optional	Shared Service Center			
GPPA039	Functional		The solution shall provide capability for user (PERSONNELIST) to review and acknowledge associated and dependent actions and sub-tasks when an HR action is initiated.(System must have intuition to pull up all required sub-actions when an HR action is requested.)	Optional	Shared Service Center			
GPPA040	Functional		The solution shall enable user (PERSONNELIST, HR IT SPECIALIST) to build in the associated dependent actions and sub-tasks into the system logic (must be modifiable).	Optional	Shared Service Center			
GPPA041	Functional		The solution shall provide user (PERSONNELIST) automated follow-up capability to report incomplete actions.	Optional	Shared Service Center			
GPPA042	Functional		The solution shall provide automated follow-up capability to report incomplete actions for a user (PERSONNELIST).	Optional	Shared Service Center			
GPPA043	Functional		The solution shall transfer previously captured user information throughout the enterprise HR system so users only have to provide information one time; fields where information was previously provided by customer (EMPLOYEE) must be transferable in the database so when a new HR action is initiated all the information (that was previously provided) is pre-populated.	Optional	Shared Service Center			
GPPA044	Functional		The solution shall provide the capability to capture and share all information throughout the enterprise HR system so information that was previously provided is pre-populated on subsequent transactions thus eliminating the need to reenter information every time a new personnel action is initiated.	Optional	Shared Service Center			
GPPA045	Functional		The solution shall provide user (PERSONNELIST) with intuitive notification tools (pop ups, prompts, bubbles, alerts, advisories) for specific HR process actions.	Optional	Shared Service Center			
GPPA046	Functional		The solution shall provide user (HR IT SPECIALIST/ADMINISTRATOR) with the ability/access to customize and routinely update/modify notification tools.	Optional	Shared Service Center			
GPPA047	Functional		The solution shall provide capability for user (PERSONNELIST) to pre-package HR actions in a module so that all the required actions are completed in a coordinated process.	Optional	Shared Service Center			

GPPA048	Functional		The solution shall provide capability for user (PERSONNELIST) to pre-package HR actions in a module so that all the required actions are completed in a coordinated process.	Optional	Shared Service Center
GPPA049	Functional		The solution shall enable user (PERSONNELIST) to insert, remove and adjust every action and consolidate all the actions into a module so that all drop/add/remove/replace actions get done at the same time or in a structured, ordered sequence.	Optional	Shared Service Center
GPPA050	Functional		The solution shall enable user (HR INFORMATION TECHNOLOGY SPECIALIST) the option to customize and modify pre-specified list of required and recommended forms associated with a requested personnel action.	Optional	Shared Service Center
GPPA051	Functional		The solution shall enable user (PERSONNELIST) access to pre-specified menu of recommended/required forms required to complete a specified personnel action.	Optional	Shared Service Center
GPPA052	Functional		The solution shall provide user (PERSONNELIST) with the ability to consolidate (or access and sequentially order) all required mandatory forms for specified process that a user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) will be required to complete (in order to complete the specified personnel action) in a reviewable module.	Optional	Shared Service Center
GPPA053	Functional		The solution shall provide user (PERSONNELIST) with the ability to manually deselect any form (item) that is not required from the module.	Optional	Shared Service Center
GPPA054	Functional		The solution shall provide the user (PERSONNELIST) with the ability to add any additional forms as required to the module (from a menu within the HR IT system or through manual upload)	Optional	Shared Service Center
GPPA055	Functional		The solution shall automatically sequence forms in a pre-specified order (in a module) so they can be routed (transmitted) by the user (PERSONNELIST) to the appropriate user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, OTHER PERSONNELIST) in the order they are required to be completed.	Optional	Shared Service Center
GPPA056	Functional		The solution must allow manual adjustment of sequencing of forms by the user [PERSONNELIST].	Optional	Shared Service Center
GPPA057	Functional		The solution shall enable user (PERSONNELIST) to route forms to user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) for completion.	Optional	Shared Service Center
GPPA058	Functional		The solution shall pre-populate forms with available personal information so users (EMPLOYEES) do not have to re-type information that has already been documented in the HR system (from previously submitted information).	Optional	Shared Service Center
GPPA059	Functional		The solution shall ensure that all user (EMPLOYEE) supplied information automatically updates the HR System and that any subsequent required forms are pre-populated with the updated information.	Optional	Shared Service Center
GPPA060	Functional		The solution shall provide workflow that routes forms for supervisory review/signature when required; from user (PERSONNELIST) to user (SUPERVISOR or DIRECTOR) and returns to user (PERSONNELIST).	Optional	Shared Service Center
GPPA061	Functional		The solution shall enable the user (PERSONNELIST) to modify the order in which forms/documents are routed (transmitted).	Optional	Shared Service Center
GPPA062	Functional		The solution shall enable user (PERSONNELIST) to select a specific personnel action to generate a pre-specified menu of recommended/required tasks (ITEMS) that can be selected and assigned (routed) to users (OTHER PERSONNELISTS, APPLICANTS, EMPLOYEES, SUPERVISORS, DIRECTORS) for action.	Optional	Shared Service Center
GPPA063	Functional		The solution shall allow user (PERSONNELIST) to review all selected personnel actions tasks in the module prior to release (initiation).	Optional	Shared Service Center
GPPA064	Functional		The solution shall provide the user (PERSONNELIST) options to select from a pre-specified menu (drop-down menu) of required and recommended tasks (PERSONNEL ACTIONS) and assign instructions (COORDINATE, APPROVE, REVIEW, COMPLETE, OTHER) to users (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, SUPPORTING OFFICE).	Optional	Shared Service Center
GPPA065	Functional		The solution shall provide modular consolidation of sub-tasks to enable user (PERSONNELIST) to confirm that a specified personnel action does not result in duplicated work, unforeseen circumstances, or incomplete work elsewhere in the system.	Optional	Shared Service Center
GPPA066	Functional		The solution shall enable user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, OTHER PERSONNELIST) to receive, access, and complete tasks (FORM, DOCUMENT, COORDINATION, REVIEW, DIRECTION) requested by user (PERSONNELIST).	Optional	Shared Service Center
GPPA067	Functional		The solution shall enable user (HR INFORMATION TECHNOLOGY SPECIALIST) the option to customize and modify pre-specified list of required and recommended tasks associated with the requested personnel action.	Optional	Shared Service Center
GPPA068	Functional		The solution shall provide task sequencing of required/recommended tasks (that can be managed/modified by the user [HR IT SPECIALIST] as part of the personnel action module)	Optional	Shared Service Center
GPPA069	Functional		The solution shall ensure user (PERSONNELIST) is alerted to any secondary HR or Pay impacts of an HR action, prior to release of a module (that initiates an HR action).	Optional	Shared Service Center
GPPA070	Functional		The solution shall ensure all required secondary actions created by the initial requested action are initiated/completed and that appropriate staff (OTHER PERSONNELISTS) are notified of the required secondary actions.	Optional	Shared Service Center
GPPA071	Functional		The solution shall provide a dashboard for user (PERSONNELIST) to monitor (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) progress (status) completing required forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
GPPA072	Functional		The solution shall provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
GPPA073	Functional		The solution shall enable user (PERSONNELIST) to manually override and cancel requested actions in the system.	Mandatory	Shared Service Center
GPPA074	Functional		The solution shall enable the user (PERSONNELIST) to modify incorrect document entries on completed forms.	Mandatory	Shared Service Center
GPPA075	Functional		The solution shall provide users (PERSONNELISTS) with the capability to manually override any and all actions that are automated in the system. (Need ability to add/delete/modify all actions.)	Optional	Shared Service Center
GPPA076	Functional		The solution shall provide the capability to manually override any and all actions that are automated in the system to users (PERSONNELISTS) who shall be able to add/delete/modify all actions.	Optional	Shared Service Center
GPPA077	Functional		The solution shall ensure all actions are handled by a retroactive process that allows sequencing and assembly of the entire set of actions at once.	Optional	Shared Service Center
GPPA078	Functional		The solution shall provide user (PERSONNELIST) with the ability to assemble and consolidate all sub-tasks and documents required to implement a retroactive action in a module.	Optional	Shared Service Center
GPPA079	Functional		The solution shall enable user (PERSONNELIST) to initiate retroactive module as an automated process, ensuring that all tasks are completed in a prescribed sequence.	Optional	Shared Service Center
GPPA080	Functional		The solution shall provide capability for user (PERSONNELIST) to research previous personnel transactions (historical records).	Optional	Shared Service Center
GPPA081	Functional		The solution shall provide access to historcial personnel transactions for user (PERSONNELIST) to perform research.	Optional	Shared Service Center
GPPA082	Functional		The solution must incorporate ability to create posthumous details.	Optional	Shared Service Center
GPPA083	Functional		The solution shall provide capability for user (PERSONNELIST) to create posthumous details (historical records).	Optional	Shared Service Center
GPPA084	Functional		The solution shall provide capability for user (PERSONNELIST) to access retroactive detailed information.	Optional	Shared Service Center
~~GPPA085~~	~~Functional~~		~~The solution shall provide capability for user (PERSONNELIST) to calculate pay for customers (EMPLOYEES) in order to implement retroactive pay and benefits actions~~.	~~Optional~~	~~Shared Service Center~~
GPPA086	Functional		The solution shall provide user with access to pay and benefits tables for the past 50 years. (PERSONNELIST needs to be able to reconstruct retroactive detailed pay and benefits.)	Optional	Shared Service Center
GPPA087	Functional		The solution shall enable user (PERSONNELIST) to calculate retroactive employee pay for specified dates (years/months/days)	Optional	Shared Service Center
GPPA088	Functional		Solution must provide dashboard information for employees, Supervisors, HR, CPC, and Payroll to be able to view the status of all requested HR/Payroll actions in real-time.	Optional	Shared Service Center
GPPA089	Functional		Solution must provide alerts for suspense items.	Optional	Shared Service Center
GPPA090	Functional		The solution shall provide users (HR USERS) enterprise-wide notifications (alerts) for suspense item; not to exceed dates	Optional	Shared Service Center
GPPA091	Functional		The solution shall provide users (HR USERS) enterprise-wide notifications (alerts) for suspense item; expiration of eligibility dates.	Optional	Shared Service Center
GPPA092	Functional		The solution shall provide users (HR USERS) enterprise-wide notifications (alerts) for suspense item; within grade increase dates	Optional	Shared Service Center
GPPA093	Functional		The solution shall provide users (HR USERS) enterprise-wide notifications (alerts) for suspense item; probationary periods.	Optional	Shared Service Center
GPPA094	Functional		The solution shall provide users (HR USERS) enterprise-wide notifications (alerts) for suspense item; eligibility periods (HBI).	Optional	Shared Service Center
GPPA095	Functional		The solution shall provide users (HR USERS) enterprise-wide notifications (alerts) for suspense item; Promotions, Career Ladder Promotions, Promotion Eligibility.	Optional	Shared Service Center

GPPA096	Functional		The solution shall provide users (HR USERS) enterprise-wide notifications (alerts) for suspense item; 90-day following EOD.	Optional	Shared Service Center
GPPA097	Functional		The solution shall provide users (HR USERS) enterprise-wide notifications (alerts) for suspense item; Conversion from excepted appointment (FEHB and FEGLI)	Optional	Shared Service Center
GPPA098	Non-functional	Integration	The solution shall provide capability for user (PERSONNELIST) to select an option to filter operational HR data to automatically flow to the eOPF and select an option to filter operational HR data to automatically flow to OPM.	Optional	Shared Service Center
GPPA099	Non-functional	Integration	Solution must contain a centralized, standardized, and automated process must eliminate user (PERSONNELIST) duplication of effort between HR system operational demands, eOPF demands, and OPM demands.	Optional	Shared Service Center
GPPA100	Non-functional	Integration	The solution shall provide user (PERSONNELIST) access to a master schedule of required OPM items; identifying, extracting, and forwarding these items as an automated process.	Optional	Shared Service Center
GPPA101	Non-functional	Integration	The solution shall enable user (PERSONNELIST) to manually forward items to OPM on an ad hoc basis (upon request); either singular items or batch requirements.	Optional	Shared Service Center
GPPA102	Non-functional	Integration	The solution shall provide users (PERSONNELISTS and HR ADMINISTRATOR) with a dashboard showing workflow of items transmitted and received by OPM.	Optional	Shared Service Center
GPPA103	Non-functional	Integration	Solution must provide alerts when HR documents are due/transmitted/received from OPM.	Optional	Shared Service Center
GPPA104	Non-functional	Integration	Solution must generate automated reports to meet OPM demand and report status of reports provided.	Optional	Shared Service Center
GPPA105	Functional		The solution shall provide users (PERSONNELISTS and HR ADMINISTRATORS) enterprise level HR System cross-edit functionality.	Optional	Shared Service Center
GPPA106	Functional		The solution shall provide users (PERSONNELISTS and HR ADMINISTRATORS) cross-edit capability so that when a customer (EMPLOYEE) changes a field on one form or area, the system will centralize the updated data and automatically apply it to other forms/fields so that system information is consistent and synchronized.	Optional	Shared Service Center
GPPA107	Functional		The solution shall provide 2-way (bi-directional) cross-edit capability so that each change in a field will drive a set of automated changes or prompts to change other fields so that updated information is distributed across the HR System and throughout connected systems. (Requirement is for logic in the system to detect and resolve anomalies.)	Optional	Shared Service Center
GPPA108	Functional		The solution shall provide users (PERSONNELISTS and HR ADMINISTRATORS) with notifications (prompts/alerts) to reveal and eliminate inconsistent data.	Optional	Shared Service Center
GPPA110	Non-functional	Security	The solution shall support role based security in order to control access to system functions (e.g. EMPLOYEE MANAGER, TRAINING ADMINISTRATOR, PERSONNELIST/PROFESSIONAL)	Mandatory	Shared Service Center
GPPA111	Functional		The solution shall provide on-line help and context-sensitive help on each of the business functions. (e.g. Glossary of training fields)	Optional	Shared Service Center
GPPA112	Functional		The solution shall provide user (EMPLOYEE) technical help using the system (hardware or software issues) or accessing and filling out screens (forms) using prompts, hover boxes, and information bubbles.	Optional	Shared Service Center
GPPA113	Functional		The solution shall provide user context-sensitive help with subject matter (HR and Payroll) questions that arise while filling out screens (forms) using prompts, hover boxes, and information bubbles.	Optional	Shared Service Center
GPPA114	Functional		Solution will enable user (HR IT SPECIALIST) to modify prompts, hover boxes, and information bubbles that are automatically provided to a user (APPLICANT, EMPLOYEE, PERSONNELIST)	Optional	Shared Service Center
GPPA115	Functional		The solution shall provide user (EMPLOYEE) with the ability to manually turn help functions on or off.	Optional	Shared Service Center
GPPA116	Functional		The solution shall provide users (EMPLOYEE) with the ability to electronically request context-sensitive help (through chat or selectable help button) from the HR help-desk (HUMAN RESOURCE HELP-DESK)	Optional	Shared Service Center
GPPA117	Functional		The solution shall provide help-desk representatives with an automated information library so that help-desk representatives can easily research questions. Automated capability shall include a search capability and user selected drop-down help menus.	Optional	Shared Service Center
GPPA118	Functional		The solution shall enable help-desk representative to forward prescribed answers from within the system directly to users (EMPLOYEE)	Optional	Shared Service Center
GPPA119	Functional		The solution shall retain transaction history and key system information based on the GSA document retention policy (records control schedule).	Mandatory	Shared Service Center
GPPA120	Functional		The solution shall retain transaction history and key system information based on the GSA document retention policy (records control schedule).	Mandatory	Shared Service Center
GPPA121	Functional		The solution shall enable user (PERSONNELIST, HR IT SPECIALIST) to add/remove items in accordance with the GSA Records Control Schedule.	Mandatory	Shared Service Center
GPPA122	Functional		The solution shall enable user (HR IT SPECIALIST) to generate and access transaction history and provide reporting capability.	Mandatory	Shared Service Center
GPPA124	Functional		The solution shall have the capability to provide/display transactional data (current & historical) to the appropriate roles in real-time.	Optional	Shared Service Center
GPPA125	Functional		The solution shall have the capability to provide/display transactional data (current & historical) to users (role based; EMPLOYEES, EMPLOYEE MANAGERS, EMPLOYEE DIRECTORS, HR IT SPECIALISTS, PERSONNELISTS) in real-time.	Optional	Shared Service Center
GPPA126	Functional		The solution shall be synchronous with supporting systems (in real-time or near real time) so transactional updates can be reported by the user (HR IT SPECIALIST) in real time.	Optional	Shared Service Center
GPPA127	Functional		The solution shall enable user (HR IT SPECIALIST) to customize user views and access based on roles.	Optional	Shared Service Center
GPPA128	Functional		The solution shall enable users (HR SUPERVISOR EMPLOYEES and HR EMPLOYEES) ability to see work accomplished on a daily basis.	Optional	Shared Service Center
GPPA129	Functional		The solution shall have the ability to generate alerts (email) for specific events.	Optional	Shared Service Center
GPPA130	Functional		Solution will provide role based users (PERSONNELIST and OTHER) with the ability to generate notifications (email alerts, prompts, advisories) for specific events.	Optional	Shared Service Center
GPPA131	Functional		The solution shall provide user (HR IT SPECIALIST) access to a centralized system location to manage standardized notifications (alerts, prompts, advisories) to users (EMPLOYEES) for all HR actions.	Optional	Shared Service Center
GPPA132	Functional		The solution shall provide user (HR IT SPECIALIST) ability to assign/associate/link notifications (alerts, prompts, advisories) to specific HR actions so that when a user (PERSONNELIST) initiates a specific personnel action, the notifications are built into the required action (in accordance with the user specified business rule associated with the action).	Optional	Shared Service Center
GPPA133	Functional		The solution shall allow user (PERSONNELIST) to add or manually modify notifications (alerts, prompts, advisories) from a list of notification options when initiating HR actions.	Optional	Shared Service Center
GPPA134	Functional		At selectable automated intervals, The solution shall remind (re-notify) user (EMPLOYEE) of required action if the user (EMPLOYEE) is non-responsive.	Optional	Shared Service Center
GPPA135	Functional		The solution shall provide user (EMPLOYEE) with access to notifications (alerts, prompts, advisories) received.	Optional	Shared Service Center
GPPA136	Functional		The solution shall provide user (SUPERVISOR) access to existing and past notifications (alerts, prompts, advisories) provided to all subordinate employees.	Optional	Shared Service Center
GPPA137	Functional		The solution shall provide user (SUPERVISOR) with routine reports showing notifications (alerts, prompts, advisories) provided to subordinate employees (user selectable option).	Optional	Shared Service Center
GPPA138	Functional		The solution shall enable user (PERSONNELIST) with the ability to review notifications sent and the status of the required actions in a single file.	Optional	Shared Service Center
GPPA139	Functional		Solution will provide user (PERSONNELIST) updates to actions completed and notifications provided to users (EMPLOYEES) in real time or near real-time.	Optional	Shared Service Center
~~GPPA140~~	~~Non-functional~~	~~Integration~~	~~The solution shall have the ability to integrate with the HR System to derive basic employee, supervisor, position, Organization information(e.g. Employee Name, Employee number, Email~~)	~~Mandatory~~	~~Shared Service Center~~
GPPA142	Non-functional	Integration	The solution shall integrate/interface with systems across GSA and to be the centralized node for basic HR information (Employee, Supervisor, Position, Organization Information etc.).	Optional	Shared Service Center
GPPA143	Functional		The solution shall generate notifications (alerts) to users (PERSONNELIST, EMPLOYEE, EMPLOYEE MANAGER) to confirm status of detailed employee and provide updates regarding time remaining (DAYS) on detailed assignment.	Optional	Shared Service Center
GPPA144	Functional		The solution shall generate notifications (alerts) at 60 days and again at 30 days remaining to confirm status and time remaining for employees on detail assignments to users (PERSONNELIST, EMPLOYEE, EMPLOYEE MANAGER).	Optional	Shared Service Center
GPPA145	Functional		The solution shall provide capability for the user (PERSONNELIST) to automatically assign performance appraisal responsibilities to the assigned user (EMPLOYEE MANAGER)	Optional	Shared Service Center
GPPA146	Functional		The solution shall provide user (PERSONNELIST) database tracking of individuals and positions.	Optional	Shared Service Center
GPPA147	Functional		The solution shall provide user (PERSONNELIST) with position hierarchy and employee hierarchy for both the permanent position and the detailed position.	Optional	Shared Service Center
~~GPPA149~~	~~Non-functional~~	~~Integration~~	~~The solution shall provide a minimum of batch nightly updates to the payroll system from OPM's Employee Express.~~	~~Optional~~	~~Shared Service Center~~
~~GPPA150~~	~~Non-functional~~	~~Integration~~	~~The solution's interface shall support real time incoming data to the payroll system from OPM's Employee Express System~~	~~Optional~~	~~Shared Service Center~~

GPPA152	Non-functional	Security	The solution shall preset access levels for users (EMPLOYEE, EMPLOYEE, MANAGER, EMPLOYEE DIRECTOR, PERSONNELIST, HR ADMINISTRATOR, HR IT SPECIALIST, HR IT ADMINISTRATOR) with the ability to customize access and administrative rights.	Optional	Shared Service Center
GPPA153	Non-functional	Security	The solution shall enable user (HR IT ADMINISTRATOR) with the capability to customize access and administrative rights.	Optional	Shared Service Center
GPPA154	Functional		Solution must ensure agency retains ownership rights of agency data it enters into any provider system or application.	Optional	Shared Service Center
GPPA155	Non-functional	Security	The solution shall provide user (HR IT SPECIALIST and HR IT ADMINISTRATOR) with the ability to control and authorize outside access to data logs for audit or other investigation purposes.	Optional	Shared Service Center
GPPA156	Non-functional	Security	Solution must support GSA user (HR IT SPECIALIST and HR IT ADMINISTRATOR) access to all operational data through portal, based on user (ROLE ASSIGNED) access and privileges.	Optional	Shared Service Center
GPPA158	Non-functional	Integration	The solution shall permit GSA administrators access to vendor data integration layer to support addition of reporting through other systems.	Optional	Shared Service Center
GPPA159	Non-functional	Integration	The solution shall comply with GSA requirement for users (EMPLOYEES [ROLE BASED INTERNAL CUSTOMERS] HR IT SPECIALISTS, HR IT ADMINISTRATORS) to have uninterrupted access to vendor data integration layer to support addition of reporting through other systems.	Optional	Shared Service Center
GPPA200	Functional		The solution shall support functionality for autopopulating fields based on the type of investigation that is being performed. Information about already processed and cleared security information shall be automatically filled.	Mandatory	Shared Service Center
GPPA201	Functional		Requirement is for system to automatically populate PSTS (replacement system) with all data required to initiate security clearance/background investigation process.	Optional	Shared Service Center
GPPA202	Functional		The solution shall generate a certificate at the end of the investigation process and send it to CPC for further □ processing. Same information is also maintained in OPF.	Mandatory	Shared Service Center
GPPA202.01	Functional		The solution shall notify individual of the completion of steps (including certificate approval) through an automated □ process instead of using manual e-mail process. System shall provide notifications and a dashboard showing the □ status of transmissions.	Mandatory	Shared Service Center
GPPA203	Functional		The solution shall have the ability to track employee Security Investigations through all stages of the process.	Mandatory	Shared Service Center
GPPA204	Non-functional	Integration	The solution shall have the capability to Interface with e-Clearance systems (e.g. GSA Credential and Identity Management System (GCIMs), Electronic Questionnaires for Investigations Processing (eQIP)	Mandatory	Shared Service Center
GPPA204.01	Functional		Future Requirement is for the selected HR IT system to interface with GCIMS (or replacement) and required OPM databases through e-delivery from OPM.An optimized solution would have an interface from OPM e-delivery to GSA Systems that provide individual security investigation case management capabilities.	Optional	Shared Service Center
GPPA205	Functional		The solution shall support role based security in order to control access to system functions and PII data in the Personnel Security component of the selected HR IT System.(e.g. PERSONNELIST, HR Business Analyst Self-Service)	Mandatory	Shared Service Center
GPPA206	Functional		The solution shall provide the employee data along with the clearance details (e.g. Manager Self-Service, Personal Self-Service, HR Business Analyst Self-Service)HR system must interface with Personnel Security component to eliminate duplication in information gathering and processing. Selected system must also interface with □ supporting systems including e-delivery (from OPM), Manager Self-Service, Personal Self-Service, HR Business Analyst Self-Service, GCIMs (or replacement).	Mandatory	Shared Service Center
GPPA206.01	Functional		Future requirement is for system to provide notification to individual applicants regarding information gathered □ (including source) and information missing based on an automated assessment of total available information. Future □ requirement is for notifications and reports to be provided to applicants, managers, OMA, and OHRM representatives □ regarding status.	Optional	Shared Service Center
GPPA207	Functional		The solution shall have the ability to enter a new case with information that tracks the subject initiation, forms, investigation requests, investigation, additional investigation, adjudication, due process, certify as defined in the data model.Requirement is for a system interface between Recruiting and Hiring system to automatically import available information into personnel security application and tracking systems. Requirement is for system to gain OPM information (via e-delivery) for the investigation information and then into the HR System. Requirement is for HR System to provide notifications (alerts) for re-investigation.	Mandatory	Shared Service Center
GPPA208	Functional		The solution shall maintain for two years all finalized security clearance related records.	Mandatory	Shared Service Center
PPA001	OPM		Use Nature of Action (NOA) codes in accordance with chapter 1 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA001.01	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated NOA codes to implement standardized personnel employee actions on behalf of GSA □ employees.Below is a summary of Standard NOA Codes (000 - 899):100 series—appointments200 series—returns to duty from non-pay status 300 series—separations 400 series—placements in non-pay and/or non-duty status 500 series—conversions to appointment 600 series—(reserved for Office of Personnel Management use) 700 series—position changes, extensions, and miscellaneous changes 800 series—pay changes and miscellaneous changes)	Mandatory	Shared Service Center
PPA001.02	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated NOA codes to implement standardized personnel employee actions on behalf of external agency employees.	Mandatory	Shared Service Center
PPA001.03	Functional		The solution shall automatically insert required associated legal authority codes if a user (PERSONNELIST) selects a specific NOA code (cross-edit capability).	Optional	Shared Service Center
PPA001.04	Functional		The solution shall automatically insert required associated remarks codes if a user (PERSONNELIST) selects a specific NOA code (cross-edit capability).	Optional	Shared Service Center
PPA001.05	Functional		The solution shall enable user (PERSONNELIST) to enter multiple NOA codes when required.	Mandatory	Shared Service Center
PPA001.06	Functional		The solution shall enable user (PERSONNELIST) to select GSA specific 900 series NOA codes (codes reserved by OPM for specific agency use) to implement GSA-specific personnel actions on behalf of GSA employees.	Mandatory	Shared Service Center
PPA001.07	Functional		The solution shall provide user (ADMINISTRATOR) the ability to add NOA codes to the database.	Mandatory	Shared Service Center
PPA001.08	Functional		The solution shall provide user (ADMINISTRATOR) the ability to remove NOA codes from the database.	Mandatory	Shared Service Center
PPA001.12	Functional		Capture all types of established tours of duty and work schedules as prescribed by the GPPA, Chapter 24, Change in Work Schedule/Change in Hours (Natures of Action 781 and 782).	Mandatory	Shared Service Center
PPA002	OPM		Use legal authorities IAW Chapter 1 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA002.01	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated authority codes to implement personnel actions on behalf of GSA employees.	Mandatory	Shared Service Center
PPA002.02	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated authority codes to implement personnel actions on behalf of external employees (e.g., GSA OIG, Commissions and Boards employees).	Mandatory	Shared Service Center
PPA002.03	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated authority codes to implement personnel actions on behalf of GSA employees.	Mandatory	Shared Service Center
PPA002.04	Functional		The solution shall enable user (PERSONNELIST) to select GSA specific authorities to implement personnel actions on behalf of GSA external employees (e.g., GSA OIG, Commissions and Boards employees).	Mandatory	Shared Service Center
PPA002.05	Functional		The solution shall automatically insert required associated legal authority codes if a user (PERSONNELIST) selects a specific NOA code (cross-edit capability).	Optional	Shared Service Center
PPA002.06	Functional		The solution shall recommend (optional, selectable) relevant legal authority codes if a user (PERSONNELIST) selects a specific NOA code (in cases where legal authorities may or may not apply or be necessary to include).	Optional	Shared Service Center
PPA002.07	Functional		The solution shall enable user (PERSONNELIST) to enter multiple legal authority codes when required.	Mandatory	Shared Service Center
PPA002.08	Functional		The solution shall provide user (PERSONNELIST) the option to delete any legal authority code from a system automated entry.	Mandatory	Shared Service Center
PPA002.09	Functional		The solution shall provide user (PERSONNELIST) the option to delete any system recommended legal authority code(s).	Mandatory	Shared Service Center
PPA002.10	Functional		The solution shall provide user (PERSONNELIST) the option to manually select any legal authority code(s).	Mandatory	Shared Service Center
PPA002.11	Functional		The solution shall provide user (ADMINISTRATOR) the ability to add legal authority codes to the database.	Mandatory	Shared Service Center

PPA002.12	Functional		The solution shall provide user (ADMINISTRATOR) the ability to remove legal authority codes from the database.	Mandatory	Shared Service Center
PPA002.13	Functional		The solution shall provide user (ADMINISTRATOR) the ability to incorporate legal authorities for phased retirement.	Mandatory	Shared Service Center
PPA003	OPM		Use remarks IAW Chapter 1 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA003.01	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated remarks codes to implement personnel actions on behalf of GSA employees.	Mandatory	Shared Service Center
PPA003.02	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated remarks codes to implement personnel actions on behalf of external employees (e.g., GSA OIG, Commissions and Boards employees).	Mandatory	Shared Service Center
PPA003.03	Functional		The solution shall enable user (PERSONNELIST) to select GSA specific remarks codes to implement personnel actions on behalf of GSA employees.	Mandatory	Shared Service Center
PPA003.04	Functional		The solution shall enable user (PERSONNELIST) to select GSA specific remarks codes to implement personnel actions on behalf of GSA external employees (e.g., GSA OIG, Commissions and Boards employees).	Mandatory	Shared Service Center
PPA003.05	Functional		The solution shall automatically insert required associated remarks codes if a user (PERSONNELIST) selects a specific NOA code (cross-edit capability).	Optional	Shared Service Center
PPA003.06	Functional		The solution shall recommend (optional, selectable) relevant remarks codes if a user (PERSONNELIST) selects a specific NOA code (in cases where remarks codes may or may not apply or be necessary to include).	Optional	Shared Service Center
PPA003.07	Functional		The solution shall enable user (PERSONNELIST) to enter multiple remarks codes when required.	Mandatory	Shared Service Center
PPA003.08	Functional		The solution shall provide user (PERSONNELIST) the option to delete any remarks codes from a system automated entry.	Mandatory	Shared Service Center
PPA003.09	Functional		The solution shall provide user (PERSONNELIST) the option to delete any system recommended remarks code(s).	Mandatory	Shared Service Center
PPA003.10	Functional		The solution shall provide user (PERSONNELIST) the option to manually select any remarks code(s).	Mandatory	Shared Service Center
PPA003.11	Functional		The solution shall provide user (ADMINISTRATOR) the ability to incorporate remarks codes to account for temporary promotions.	Mandatory	Shared Service Center
PPA003.12	Functional		The solution shall provide user (ADMINISTRATOR) the ability to incorporate remarks for detailed employee processing.	Mandatory	Shared Service Center
PPA003.13	Functional		The solution shall provide user (ADMINISTRATOR) the ability to add remarks codes to the database.	Mandatory	Shared Service Center
PPA003.14	Functional		The solution shall provide user (ADMINISTRATOR) the ability to remove remarks codes from the database.	Mandatory	Shared Service Center
PPA004	OPM		Cancel personnel actions IAW Chapter 1 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA004.01	Functional		The solution shall enable user (PERSONNELIST) to cancel personnel actions.	Mandatory	Shared Service Center
PPA004.02	Functional		The solution shall enable user (PERSONNELIST) to restore all actions associated with a cancellation of personnel actions.	Mandatory	Shared Service Center
PPA005	OPM		Use employee name IAW Chapter 3 Subchapter 1-2 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA005.01	Functional		Use employee name IAW Chapter 3, Subchapter 1-2: The general rule on use of a name on an employee's records is consistency: show the employee's name in the same way on all Government records. The name to record on official personnel records for an appointee is the name commonly used in the community where the appointee resides, for example, the name entered on application papers and used for social security records, driver's license, income tax purposes, and bank accounts. If application papers reflect a nickname enclosed in parentheses or quotation marks, it is not considered part of the employee's name for personnel records.	Mandatory	Shared Service Center
PPA006	OPM		Record employee name IAW Chapter 3 Subchapter 1-2 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA006.01	Functional		The solution shall enable user (PERSONNELIST) to enter user (EMPLOYEE) name in the following format:LAST NAME [comma] SUFFIX (Jr., Sr.) [comma] [space]FIRST NAME or INITIAL [space]MIDDLE NAME(s) or initial(s)Examples:DOE, Jr., JOHN NMNMARTIN, M. CATHERINEO'REILLY, JOHN F.X.MARTINEZ-SANDOVAL, MARIAELENA>NO LAST NAME, TAYLOR NMNTAYLOR, NO FIRST NAME NMN<	Mandatory	Shared Service Center
PPA006.02	Functional		The solution shall require user (PERSONNELIST) to validate user (EMPLOYEE) name and any legal name change.	Mandatory	Shared Service Center
PPA006.03	Functional		The solution shall only accept one name per user (EMPLOYEE).	Mandatory	Shared Service Center
PPA006.04	Functional		The solution shall enable user (EMPLOYEE, APPLICANT) to enter "NMN" if they do not have a middle name.	Mandatory	Shared Service Center
PPA006.05	Functional		The solution shall provide prompt to ensure user (EMPLOYEE) does not enter nickname.	Mandatory	Shared Service Center
PPA006.06	Functional		The solution shall reject user (EMPLOYEE) attempt to enter abbreviated name.	Mandatory	Shared Service Center
PPA006.07	Functional		The solution shall ensure that single name user (EMPLOYEE) can enter a single name in the First Name field.	Mandatory	Shared Service Center
PPA006.08	Functional		The solution shall ensure that single name user (EMPLOYEE) can enter single name in the Last Name field	Mandatory	Shared Service Center
PPA006.09	Functional		The solution shall ensure that single name user (EMPLOYEE) cannot enter single name in the Middle Name field.	Mandatory	Shared Service Center
PPA006.10	Functional		The solution shall enable user (EMPLOYEE) to record apostrophes and hyphens or spaces between double names.	Mandatory	Shared Service Center
PPA006.11	Functional		The solution shall reject user (EMPLOYEE) attempt to use titles such as "Mr.", "Ms.", "Miss", "Dr.", or "Professor," in any electronic HR System format.	Mandatory	Shared Service Center
PPA006.12	Functional		The solution shall reject user (EMPLOYEE) attempt to use titles such as "Mr.", "Ms.", "Miss", "Dr.", or "Professor," on Notifications of Personnel Action.	Mandatory	Shared Service Center
PPA006.13	Functional		The solution shall reject user (EMPLOYEE) attempt to use titles such as "Mr.", "Ms.", "Miss", "Dr.", or "Professor," on Official Personnel Folder.	Mandatory	Shared Service Center
PPA007	OPM		Establish effective dates IAW Chapter 3 Subchapter 1-3 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA007.01	Functional		The solution shall establish effective dates IAW OPM standards and GSA processes (1st day of the pay period).	Mandatory	Shared Service Center
PPA007.02	Functional		The solution shall enable user (PERSONNELIST) to enter effective date for Notification of Personnel Action that takes effect at the end of the day (midnight) on the date entered.	Mandatory	Shared Service Center
PPA007.03	Functional		The solution shall enable user (PERSONNELIST) to enter effective date for separations (actions that remove employees from the rolls of their agencies, for example, deaths, resignations, terminations, removals, and retirements) that takes effect at the end of the day (midnight) on the date entered.	Mandatory	Shared Service Center
PPA007.04	Functional		The solution shall enable user (PERSONNELIST) to enter effective date for actions to terminate grade and pay retention that takes effect at the end of the day (midnight) on the date entered.	Mandatory	Shared Service Center
PPA007.05	Functional		The solution shall enable user (PERSONNELIST) to enter effective date for OptOut Phased Employment/Retirement action that takes effect at the end of the day (midnight) on the date entered.	Mandatory	Shared Service Center
PPA007.06	Functional		The solution shall enable user (PERSONNELIST) to modify an effective date in advance of the effective date.	Mandatory	Shared Service Center
PPA007.07	Functional		The solution shall enable user (PERSONNELIST) to get approval to set an effective date from an appointing officer through a system generated automated, verifiable, recorded process.	Mandatory	Shared Service Center
PPA007.08	Functional		The solution shall enable user (PERSONNELIST) to set all effective date and times for all initiating activities (any activity not listed above) at the beginning of the day (12:01 a.m.) of the effective date selected.	Mandatory	Shared Service Center
PPA007.09	Functional		The solution shall enable user (PERSONNELIST) to modify effective dates/times in response to exceptions identified in OPM guidance (Chapter 3, Table 3-A, Table 3-B)	Mandatory	Shared Service Center
PPA007.10	Functional		The solution shall enable user (PERSONNELIST) to automatically align effective dates (Entry on Duty) for transferring inbound employee (coming from another agency).	Mandatory	Shared Service Center
PPA007.11	Functional		The solution shall enable user (PERSONNELIST) to automatically update effective date/EOD for inbound employees as part of onboarding.	Mandatory	Shared Service Center
PPA007.12	Functional		The solution shall enable PERSONNELIST to be able to override EOD date, when necessary.	Mandatory	Shared Service Center
PPA008	OPM		Obtain approval for personnel actions IAW Chapter 3 Subchapter 1-4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA008.01	Functional		The solution shall enable user (PERSONNELIST) to assign an appointing officer through an internal automated capability.	Optional	Shared Service Center

PPA008.02	Functional		The solution shall provide user (PERSONNELIST) with an automated workflow process to gain approval for requested personnel actions from user (APPOINTMENT OFFICIAL).	Optional	Shared Service Center
PPA008.03	Functional		The solution shall store user (APPOINTMENT OFFICIAL) signature block information for user (PERSONNELIST) to be able to select for signature.	Optional	Shared Service Center
PPA008.04	Functional		The solution shall enable user (APPOINTMENT OFFICIAL) to certify appointments electronically in form 52, Part C-2.	Mandatory	Shared Service Center
PPA008.05	Functional		The solution shall enable user (APPOINTMENT OFFICIAL) to certify appointments electronically in form 50, blocks 49 and 50.	Mandatory	Shared Service Center
PPA008.06	Functional		The solution shall enable user (HR INFORMATION TECHNOLOGY SPECIALIST) the option to customize and modify pre-specified list of required and recommended forms associated with a requested personnel action.	Optional	Shared Service Center
PPA008.07	Functional		The solution shall enable user (PERSONNELIST) access to pre-specified menu of recommended/required forms required to complete a specified personnel action.	Optional	Shared Service Center
PPA008.08	Functional		The solution shall provide user (PERSONNELIST) with the ability to consolidate (or access and sequentially order) all required mandatory forms for specified process that a user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) will be required to complete (in order to complete the specified personnel action) in a reviewable module.	Optional	Shared Service Center
PPA008.09	Functional		The solution shall provide user (PERSONNELIST) with the ability to manually deselect any form (item) that is not required from the module.	Optional	Shared Service Center
PPA008.10	Functional		The solution shall provide the user (PERSONNELIST) with the ability to add any additional forms as required to the module (from a menu within the HR IT system or through manual upload)	Optional	Shared Service Center
PPA008.11	Functional		The solution shall automatically sequence forms in a pre-specified order (in a module) so they can be routed (transmitted) by the user (PERSONNELIST) to the appropriate user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, OTHER PERSONNELIST) in the order they are required to be completed.	Optional	Shared Service Center
PPA008.12	Functional		The solution shall allow manual adjustment of sequencing of the approval workflow by the user [PERSONNELIST].	Optional	Shared Service Center
PPA008.13	Functional		The solution shall permit reverse routing, in order for the receiving user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, OTHER PERSONNELIST) to return forms to the transmitting user when corrections are needed.	Optional	Shared Service Center
PPA008.14	Functional		The solution shall capture the reasons for the corrections to the receiving user to fill out using a drop-down list or free text.	Optional	Shared Service Center
PPA008.15	Functional		The solution shall enable user (PERSONNELIST) to route forms to user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) for completion.	Optional	Shared Service Center
PPA008.16	Functional		The solution shall pre-populate forms with available personal information so users (EMPLOYEES) do not have to re-type information that has already been documented in the HR system (from previously submitted information).	Optional	Shared Service Center
PPA008.17	Functional		The solution shall ensure that all user (EMPLOYEE) supplied information automatically updates the HR System and that any subsequent required forms are pre-populated with the updated information.	Optional	Shared Service Center
PPA008.18	Functional		The solution shall provide workflow that routes forms for supervisory review/signature when required; from user (PERSONNELIST) to user (SUPERVISOR or DIRECTOR) and returns to user (PERSONNELIST).	Optional	Shared Service Center
PPA008.19	Functional		The solution shall enable the user (PERSONNELIST) to modify the order in which actions/forms/documents are routed (transmitted).	Optional	Shared Service Center
PPA008.20	Functional		The solution shall enable user (PERSONNELIST) to select a specific personnel action to generate a pre-specified menu of recommended/required tasks (ITEMS) that can be selected and assigned (routed) to users (OTHER PERSONNELISTS, APPLICANTS, EMPLOYEES, SUPERVISORS, DIRECTORS) for action.	Optional	Shared Service Center
PPA008.21	Functional		The solution shall allow user (PERSONNELIST) to review all selected personnel actions tasks in a module prior to release (initiation).	Optional	Shared Service Center
PPA008.22	Functional		The solution shall provide the user (PERSONNELIST) options to select from a pre-specified menu (drop-down menu) of required and recommended tasks (PERSONNEL ACTIONS) and assign instructions (COORDINATE, APPROVE, REVIEW, COMPLETE, OTHER) to users (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, SUPPORTING OFFICE).	Optional	Shared Service Center
PPA008.23	Functional		The solution shall provide modular consolidation of sub-tasks to enable user (PERSONNELIST) to confirm that a specified personnel action does not result in duplicated work, unforeseen circumstances, or incomplete work elsewhere in the system.	Optional	Shared Service Center
PPA008.24	Functional		The solution shall enable user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, OTHER PERSONNELIST) to receive, access, and complete tasks (FORM, DOCUMENT, COORDINATION, REVIEW, DIRECTION) requested by user (PERSONNELIST).	Optional	Shared Service Center
PPA008.25	Functional		The solution shall enable user (HR INFORMATION TECHNOLOGY SPECIALIST) the option to customize and modify pre-specified list of required and recommended tasks associated with the requested personnel action.	Optional	Shared Service Center
PPA008.26	Functional		The solution shall provide task sequencing of required/recommended tasks (that can be managed/modified by the user [HR IT SPECIALIST] as part of the personnel action module)	Optional	Shared Service Center
PPA008.27	Functional		The solution shall ensure user (PERSONNELIST) is alerted to any secondary HR or Pay impacts of an HR action, prior to release of a module (that initiates an HR action).	Optional	Shared Service Center
PPA008.28	Functional		The solution shall ensure all required secondary actions created by the initial requested action are initiated/completed and that appropriate staff (OTHER PERSONNELISTS) are notified of the required secondary actions.	Optional	Shared Service Center
PPA008.29	Functional		The solution shall provide a dashboard for user (PERSONNELIST) to monitor (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) progress (status) completing required forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
PPA008.30	Functional		The solution shall provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
PPA008.31	Functional		The solution shall contain dashboard displays which must be customized to meet the needs of the user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
PPA008.32	Functional		The solution shall enable HR System/Database Administrators to control access through designated role assignments for users (EMPLOYEE, SUPERVISOR, DIRECTOR, PERSONNELIST).	Optional	Shared Service Center
PPA008.33	Functional		The solution shall enable user (PERSONNELIST) to manually override and cancel requested actions in the system.	Mandatory	Shared Service Center
PPA008.34	Functional		The solution shall enable the user (PERSONNELIST) to modify incorrect document entries on completed forms.	Mandatory	Shared Service Center
PPA008.35	Functional		The solution shall enable user (EMPLOYEE, APPLICANT, PERSONNELIST) to use approved electronic signature capability (IAW Chapter 3 Subchapter 3 of the Guide to Processing Personnel Actions.)	Mandatory	Shared Service Center
PPA008.36	Functional		The solution shall ensure all documents are electronically signed by the user (EMPLOYEE, SUPERVISOR, PERSONNELIST) prior to transmission.	Optional	Shared Service Center
PPA008.37	Functional		The solution shall provide user (EMPLOYEE or SUPERVISOR) the ability to re-sign a document that has been corrected or revised by the user (EMPLOYEE) or by the user (SUPERVISOR) or by the user (PERSONNELIST)	Optional	Shared Service Center
PPA008.38	Functional		The solution shall enable user (PERSONNELIST) to select and route (transmit) required personnel records ITEMS to the employee eOPF.	Optional	Shared Service Center
PPA008.39	Functional		The solution shall enable user (PERSONNELIST) to select and retain records (that are not required in the eOPF) but must be retained per OPM guidance.	Optional	Shared Service Center
PPA008.40	Functional		The solution shall enable user (EMPLOYEE) to enter and maintain home address for the duration of employment.	Optional	Shared Service Center
PPA008.41	Functional		The solution shall maintain last known address for no less than 30 years following separation.	Optional	Shared Service Center
PPA008.42	Functional		The solution shall allow user (SEPARATED EMPLOYEE) to update home address.	Optional	Shared Service Center
PPA008.43	Functional		The solution shall enable user (PERSONNELIST) to assemble all required forms and associated tasks in a module prior to effective date.	Optional	Shared Service Center
PPA008.44	Functional		The solution shall provide user (PERSONNELIST) a selectable option to process personnel actions prior to effective date for promotions and EOD.	Optional	Shared Service Center
PPA008.45	Functional		The solution shall provide user (PERSONNELIST) a selectable option to enter effective dates in the future.	Optional	Shared Service Center
PPA008.46	Functional		The solution shall provide user (PERSONNELIST) ability to modify effective dates.	Optional	Shared Service Center
PPA009	OPM		Obtain approval for use of electronic forms IAW Chapter 3 Subchapter 3 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA009.01	Functional		The solution shall enable all users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to use GSA electronic forms whenever authorized by GSA.	Mandatory	Shared Service Center

PPA009.02	Functional		The solution shall enable all users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to use externally approved electronic forms whenever authorized by the owning external agency.	Mandatory	Shared Service Center
PPA009.03	Functional		The solution shall enable users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to use electronic forms in accordance with definition and use requirements specified in the Guide to Personnel Processing (Chapter 3, Subchapter 3).	Mandatory	Shared Service Center
PPA009.04	Functional		The solution shall enable users (SYSTEM ADMINISTRATOR) to convert forms from paper to electronic, when approved by OPM or other owning agency.	Mandatory	Shared Service Center
PPA009.05	Functional		The solution shall enable users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to upload paper forms that are not approved for electronic format.	Mandatory	Shared Service Center
PPA009.06	Functional		The solution shall enable users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to manually correct user entries on electronic forms that are incorrect/incomplete in accordance with GSA established access standards.	Optional	Shared Service Center
PPA009.07	Functional		Solution must be able to recall all completed (and incomplete) forms through designated sorting processes which include: sort by type, sort by individual, sort by requested package, sort by date + type, sort by date + individual, sort by organization, sort by employee category and or occupational series.	Optional	Shared Service Center
PPA009.08	Functional		The solution shall enable user (SYSTEM ADMINISTRATOR) to immediately change electronic forms when forms change.	Mandatory	Shared Service Center
PPA009.09	Functional		The solution shall enable users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to electronically sign all forms that are authorized for electronic signature.	Optional	Shared Service Center
PPA009.10	Functional		The solution shall enable user (HR INFORMATION TECHNOLOGY SPECIALIST) the option to customize and modify pre-specified list of required and recommended forms associated with a requested personnel action.	Optional	Shared Service Center
PPA009.11	Functional		The solution shall enable user (PERSONNELIST) access to pre-specified menu of recommended/required forms required to complete a specified personnel action.	Optional	Shared Service Center
PPA009.12	Functional		The solution shall provide user (PERSONNELIST) with the ability to consolidate (or access and sequentially order) all required mandatory forms for specified process that a user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) will be required to complete (in order to complete the specified personnel action) in a reviewable module.	Optional	Shared Service Center
PPA009.13	Functional		The solution shall provide user (PERSONNELIST) with the ability to manually deselect any form (item) that is not required from the module.	Optional	Shared Service Center
PPA009.14	Functional		The solution shall provide the user (PERSONNELIST) with the ability to add any additional forms as required to the module (from a menu within the HR IT system or through manual upload)	Optional	Shared Service Center
PPA009.15	Functional		The solution shall automatically sequence forms in a pre-specified order (in a module) so they can be routed (transmitted) by the user (PERSONNELIST) to the appropriate user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, OTHER PERSONNELIST) in the order they are required to be completed.	Optional	Shared Service Center
PPA009.16	Functional		The solution shall allow manual adjustment of sequencing by the user [PERSONNELIST].	Optional	Shared Service Center
PPA009.17	Functional		The solution shall enable user (PERSONNELIST) to route forms to user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) for completion.	Optional	Shared Service Center
PPA009.18	Functional		The solution shall pre-populate forms with available personal information so users (EMPLOYEES) do not have to re-type information that has already been documented in the HR system (from previously submitted information).	Optional	Shared Service Center
PPA010	OPM		Obtain approval for use of electronic signatures IAW Chapter 3 Subchapter 3 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA010.02	Non-functional	Technical Specification	Solution system must comply with OPM and other owning agency guidelines for electronic signature.	Mandatory	Shared Service Center
PPA010.11	Non-functional	Technical Specification	The solution shall provide user (ADMINISTRATOR) with control procedures to ensure the authenticity of data, including the electronic signature. (Such controls must provide reasonable assurance that deliberate or inadvertent manipulation, modification, or loss of data on the electronically stored form is detected.	Mandatory	Shared Service Center
PPA010.12	Non-functional	Technical Specification	The solution shall provide users (ADMINISTRATOR) with notification if deliberate or inadvertent manipulation, modification, or loss of data on an electronically stored form is detected.	Mandatory	Shared Service Center
PPA011	OPM		Use approved electronic forms IAW Chapter 3 Subchapter 3 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA011.01	Functional		The solution shall enable all users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to use GSA electronic forms whenever authorized by GSA.	Mandatory	Shared Service Center
PPA011.02	Functional		The solution shall enable all users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to use externally approved electronic forms whenever authorized by the owning external agency.	Mandatory	Shared Service Center
PPA011.03	Functional		The solution shall enable users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to use electronic forms in accordance with definition and use requirements specified in the Guide to Personnel Processing (Chapter 3, Subchapter 3).	Mandatory	Shared Service Center
PPA011.04	Functional		The solution shall enable users (SYSTEM ADMINISTRATOR) to convert forms from paper to electronic, when approved by OPM or other owning agency.	Mandatory	Shared Service Center
PPA011.05	Functional		The solution shall enable users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to upload paper forms that are not approved for electronic format.	Mandatory	Shared Service Center
PPA011.06	Functional		The solution shall enable users (EMPLOYEES, EMPLOYEE MANAGERS, PERSONNELISTS, HR ADMINISTRATORS) to manually correct user entries on electronic forms that are incorrect/incomplete in accordance with GSA established access standards.	Optional	Shared Service Center
PPA011.07	Functional		Solution must be able to recall all completed (and incomplete) forms through designated sorting processes which include: sort by type, sort by individual, sort by requested package, sort by date + type, sort by date + individual, sort by organization, sort by employee category and or occupational series.	Mandatory	Shared Service Center
PPA011.08	Functional		The solution shall enable user (SYSTEM ADMINISTRATOR) to immediately change electronic forms when forms change.	Mandatory	Shared Service Center
PPA011.09	Functional		The solution shall enable users (PERSONNELIST) to recall all completed (and incomplete) forms through designated sorting processes (sort by type, sort by individual, sort by requested package [module], sort by date + type, sort by date + individual, sort by organization, sort by employee category and or occupational series.	Mandatory	Shared Service Center
PPA012	OPM		Use approved electronic signatures IAW Chapter 3 Subchapter 3 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA012.01	Functional		Solution shall be approved for use of electronic signatures by OPM.	Mandatory	Shared Service Center
PPA012.02	Functional		Solution shall comply with OPM and other owning agency guidelines for electronic signature.	Mandatory	Shared Service Center
PPA012.03	Functional		The solution shall enable users (ALL) to use electronic signature on all documents/electronic forms whenever authorized.	Mandatory	Shared Service Center
PPA012.04	Functional		The solution shall support user requests (SYSTEM ADMINISTRATION) for certification of forms for e-signature by OPM.	Mandatory	Shared Service Center
PPA012.05	Functional		The solution shall enable user (APPROVING OFFICIAL) to electronically sign documents with a signature that is unique to the user (by methods that distinguish the specific approving official).	Mandatory	Shared Service Center
PPA012.06	Functional		The solution shall enable user (APPROVING OFFICIAL) to electronically sign documents with a signature that remains under the sole control of the user.	Mandatory	Shared Service Center
PPA012.07	Functional		The solution shall provide users (ADMINISTRATOR) with the capability to verify an electronic signature.	Mandatory	Shared Service Center
PPA012.08	Functional		The solution shall provide users (ADMINISTRATOR) with the capability to directly and positively link data, including approval dates with an electronic signature.	Mandatory	Shared Service Center
PPA012.09	Functional		The solution shall provide users (ADMINISTRATOR) with the capability to verify electronic signature and approval dates for the standard form 50, Notification of Personnel Action, block 49. (The date in block 49 must satisfy the requirements for completing block 49 as addressed in the “Instructions for Completing the Standard Form 50")	Mandatory	Shared Service Center
PPA012.10	Functional		The solution shall provide users (ADMINISTRATOR) with the capability to verify electronic signature and approval dates for the standard form 52, (blocks 1-39) and Parts C, E, and F.	Mandatory	Shared Service Center
PPA012.11	Functional		The solution shall provide user (ADMINISTRATOR) with control procedures to ensure the authenticity of data, including the electronic signature. (Such controls must provide reasonable assurance that deliberate or inadvertent manipulation, modification, or loss of data on the electronically stored form is detected.	Mandatory	Shared Service Center
PPA012.12	Functional		The solution shall provide users (ADMINISTRATOR) with notification if deliberate or inadvertent manipulation, modification, or loss of data on an electronically stored form is detected.	Mandatory	Shared Service Center
PPA013	OPM		Establish an entry on duty process for new employees to appointments to Federal civil service positions IAW Chapter 3 Subchapter 4 of the Guide to Processing Personnel Actions.	Optional	Shared Service Center
PPA013.01	Functional		The solution shall enable user (PERSONNELIST) to automate EOD process for new employee appointments.	Optional	Shared Service Center
PPA013.02	Functional		The solution shall enable user (PERSONNELIST) to ensure user (EMPLOYEE CANDIDATE) completes SF61, Oath of Office.	Optional	Shared Service Center

PPA013.03	Functional		The solution shall enable user (PERSONNELIST) to ensure user (EMPLOYEE CANDIDATE) completes SF 144, Statement of Prior Federal Service.	Optional	Shared Service Center
PPA013.04	Functional		The solution shall enable user (PERSONNELIST) to ensure establishment of Personnel Folder (eOPF) for incoming employee (EMPLOYEE CANDIDATE).	Optional	Shared Service Center
PPA013.05	Functional		The solution shall enable user (PERSONNELIST) transfer/obtain existing Personnel Folders for employees with prior federal service.	Optional	Shared Service Center
PPA013.06	Functional		The solution shall provide the capability for user (PERSONNELIST) to request completion of required forms (GSA 2160, GSA 3665, GSA 1378, GSA 3648) from user (CANDIDATE EMPLOYEE)	Optional	Shared Service Center
PPA013.07	Functional		The solution shall enable user (CANDIDATE EMPLOYEE) to electronically complete GSA required forms (GSA 2160, GSA 3665, GSA 1378, GSA 3648).	Optional	Shared Service Center
PPA013.08	Functional		The solution shall enable user (PERSONNELIST) access to pre-specified menu of recommended/required forms required to complete EOD (GSA 2160, GSA 3665, GSA 1378, GSA 3648).	Optional	Shared Service Center
PPA013.09	Functional		The solution shall provide user (PERSONNELIST) with the ability to consolidate (or access and sequentially order) all required mandatory forms (GSA 2160, GSA 3665, GSA 1378, GSA 3648) for specified process that a user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) will be required to complete (in order to complete the specified personnel action) in a reviewable module.	Optional	Shared Service Center
PPA013.10	Functional		The solution shall provide a dashboard for user (PERSONNELIST) to monitor (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) progress (status) completing required forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
PPA013.11	Functional		The solution shall provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
PPA013.12	Functional		Solution must contain dashboard displays which must be customized to meet the needs of the user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
PPA013.13	Functional		Solution must provide user (EMPLOYEE or SUPERVISOR) the ability to re-sign a document that has been corrected or revised by the user (EMPLOYEE) or by the user (SUPERVISOR) or by the user (PERSONNELIST)	Optional	Shared Service Center
PPA013.14	Functional		The solution shall enable user (APPLICANTS) to select and route (transmit) required personnel document prior to EOD (without network access).	Optional	Shared Service Center
PPA014	OPM		Follow established procedures for requesting personnel actions IAW Chapter 4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA014.01	Functional		Request personnel actions following established procedures, IAW Chapter 4 of the GPPA, Requesting and Documenting Personnel Actions.	Mandatory	Shared Service Center
PPA015	OPM		Follow established procedures for documenting personnel actions IAW Chapter 4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA015.01	Functional		Document personnel actions following established procedures IAW Chapter 4 of the GPPA, Requesting and Documenting Personnel Actions.	Mandatory	Shared Service Center
PPA016	OPM		Follow established procedures for notifications of personnel action IAW Chapter 4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA016.01	Functional		Provide notifications of personnel actions following established procedures IAW Chapter 4 of the GPPA, Requesting and Documenting Personnel Actions.	Mandatory	Shared Service Center
PPA017	OPM		Follow established procedures for documenting notification of personnel action IAW Chapter 4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA017.01	Functional		Document notifications of personnel action by following established procedures IAW Chapter 4 of the GPPA, Requesting and Documenting Personnel Actions.	Mandatory	Shared Service Center
PPA018	OPM		Follow established procedures for requesting exceptions to the Standard Form 50 IAW Chapter 4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA018.01	Functional		The solution shall enable users (PERSONNELISTS) to be able to store and modify names and signature blocks for users (APPOINTING AUTHORITIES) signatures on forms.	Mandatory	Shared Service Center
PPA018.02	Functional		The solution shall enable users (PERSONNELISTS) to automatically update names and signature blocks for users (APPOINTING AUTHORITIES) signatories at each of the external agencies.	Mandatory	Shared Service Center
PPA019	OPM		Follow established procedures for requesting exceptions to the Standard Form 52 IAW Chapter 4 of the Guide to Processing Personnel Actions.	Optional	Shared Service Center
PPA019.01	Functional		The solution shall enable users (PERSONNELISTS) to be able to store and modify names and signature blocks for users (APPOINTING AUTHORITIES) signatures on forms.	Mandatory	Shared Service Center
PPA019.02	Functional		The solution shall enable users (PERSONNELISTS) to automatically update names and signature blocks for users (APPOINTING AUTHORITIES) signatories at each of the external agencies.	Mandatory	Shared Service Center
PPA020	OPM		Follow established procedures for documenting exceptions to the Standard Form 50 IAW Chapter 4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA020.01	Functional		The solution shall enable users (PERSONNELISTS) to be able to store and modify names and signature blocks for users (APPOINTING AUTHORITIES) signatures on forms.	Mandatory	Shared Service Center
PPA020.02	Functional		The solution shall enable users (PERSONNELISTS) to automatically update names and signature blocks for users (APPOINTING AUTHORITIES) signatories at each of the external agencies.	Mandatory	Shared Service Center
PPA021	OPM		Follow established procedures for documenting exceptions to the Standard Form 52 IAW Chapter 4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA021.01	Functional		The solution shall enable users (PERSONNELISTS) to be able to store and modify names and signature blocks for users (APPOINTING AUTHORITIES) signatures on forms.	Mandatory	Shared Service Center
PPA021.02	Functional		The solution shall enable users (PERSONNELISTS) to automatically update names and signature blocks for users (APPOINTING AUTHORITIES) signatories at each of the external agencies.	Mandatory	Shared Service Center
PPA022	OPM		Follow established procedures for requesting list form of notice IAW Chapter 4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA022.01	Functional		Request list of form notice following established procedures IAW Chapter 4 of the GPPA, Requesting and Documenting Personnel Actions.	Mandatory	Shared Service Center
PPA023	OPM		Follow established procedures for documenting list form of notice IAW Chapter 4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA023.01	Functional		Solution must enable user (PERSONNELIST) to be able to execute "list form of notice" mass personnel actions.	Mandatory	Shared Service Center
PPA023.02	Functional		Solution must enable user (PERSONNELIST) to be able to execute "list form of notice" in the format specified on page 4-49, GPPA, Chapter 4. Solution must enable user to coordinate document in the same automated sequence as SF 52 actions.	Mandatory	Shared Service Center
PPA024	OPM		Follow established procedures for collecting demographic data IAW Chapter 4 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA024.01	Functional		Solution must enable user (PERSONNELIST) to be able to coordinate list form of notice document in the same automated sequence as SF 52 actions.	Mandatory	Shared Service Center
PPA025	OPM		Process creditable service IAW Chapter 6 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA025.01	Functional		Process creditable service IAW Chapter 6 of the Guide to Processing Personnel Actions.See Chapter 6 of the GPPA, Page 6-4.	Mandatory	Shared Service Center
PPA026	OPM		Follow established procedures for calculating service computation dates which capture creditable service IAW Chapter 6 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA026.01	Functional		Follow established procedures for calculating service computation dates which capture creditable service IAW Chapter 6 of the Guide to Processing Personnel Actions, Page 6-3.	Mandatory	Shared Service Center
PPA027	OPM		Document veterans' preference for reduction in force IAW Chapter 7 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA027.01	Functional		Document veterans' preference for reduction in force IAW Chapter 7 of the Guide to Processing Personnel Actions, Subchapter 1.	Mandatory	Shared Service Center
PPA028	OPM		Document changes to veteransâ€™ preference for reduction-in-force IAW Chapter 7 of the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA028.01	Functional		Document changes to veterans' preference for reduction-in-force IAW Chapter 7 of the Guide to Processing Personnel Actions, Subchapter 2.	Mandatory	Shared Service Center
PPA029	OPM		Process personnel actions IAW the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA030	OPM		Ensure NOAs conform to the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA030.01	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated NOA codes to implement standardized personnel employee actions on behalf of external agency employees.	Mandatory	Shared Service Center
PPA030.02	Functional		The solution shall automatically insert required associated legal authority codes if a user (PERSONNELIST) selects a specific NOA code (cross-edit capability).	Optional	Shared Service Center
PPA030.03	Functional		The solution shall automatically insert required associated remarks codes if a user (PERSONNELIST) selects a specific NOA code (cross-edit capability).	Optional	Shared Service Center
PPA030.04	Functional		The solution shall recommend (optional, selectable) relevant legal authority codes if a user (PERSONNELIST) selects a specific NOA code (in cases where legal authorities may or may not apply or be necessary to include).	Optional	Shared Service Center

PPA030.05	Functional		The solution shall recommend (optional, selectable) relevant remarks codes if a user (PERSONNELIST) selects a specific NOA code (in cases where remarks codes may or may not apply or be necessary to include).	Optional	Shared Service Center
PPA030.06	Functional		The solution shall provide user (PERSONNELIST) with the capability to delete any legal authority code from a system automated entry.	Optional	Shared Service Center
PPA030.07	Functional		The solution shall provide user (PERSONNELIST) with the capability to delete any remarks code from a system automated entry.	Optional	Shared Service Center
PPA030.08	Functional		The solution shall enable user (PERSONNELIST) to delete any recommended legal authority code(s).	Optional	Shared Service Center
PPA030.09	Functional		The solution shall enable user (PERSONNELIST) to delete any recommended remarks code(s).	Optional	Shared Service Center
PPA030.10	Functional		The solution shall enable user (PERSONNELIST) to manually add any legal authority code(s).	Optional	Shared Service Center
PPA030.11	Functional		The solution shall enable user (PERSONNELIST) to manually add any recommended remarks code(s).	Optional	Shared Service Center
PPA030.12	Functional		The solution shall enable user (PERSONNELIST) to enter multiple NOA codes when required.	Mandatory	Shared Service Center
PPA030.13	Functional		The solution shall enable user (PERSONNELIST) to select GSA specific 900 series codes (codes reserved by OPM for specific agency use) to implement GSA-specific personnel actions on behalf of GSA employees.	Mandatory	Shared Service Center
PPA030.14	Functional		The solution shall enable user (PERSONNELIST) to select GSA specific ZLM codes (codes reserved by OPM for specific agency use) to implement GSA-specific personnel actions on behalf of GSA employees.	Mandatory	Shared Service Center
PPA030.15	Functional		The solution shall provide user (ADMINISTRATOR) the ability to add NOA codes to the database.	Mandatory	Shared Service Center
PPA030.16	Functional		The solution shall provide user (ADMINISTRATOR) the ability to remove NOA codes from the database.	Mandatory	Shared Service Center
PPA030.17	Functional		Solution must ensure all notifications to employees must be automated, stored, and available for immediate recall when requested so that PERSONNELIST can demonstrate employee receipt of actions.Similarly, employee must be able to see history of received and requested actions.	Optional	Shared Service Center
PPA031	OPM		Ensure authorities conform to the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA031.01	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated authority codes to implement personnel actions on behalf of GSA employees.	Mandatory	Shared Service Center
PPA031.02	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated authority codes to implement personnel actions on behalf of external employees.	Optional	Shared Service Center
PPA031.03	Functional		The solution shall enable user (PERSONNELIST) to select GSA specific authorities to implement personnel actions on behalf of GSA employees.	Optional	Shared Service Center
PPA031.04	Functional		The solution shall enable user (PERSONNELIST) to select GSA specific authorities to implement personnel actions on behalf of GSA external employees.	Optional	Shared Service Center
PPA031.05	Functional		The solution shall automatically insert required associated legal authority codes if a user (PERSONNELIST) selects a specific NOA code (cross-edit capability).	Optional	Shared Service Center
PPA031.06	Functional		The solution shall recommend (optional, selectable) relevant legal authority codes if a user (PERSONNELIST) selects a specific NOA code (in cases where legal authorities may or may not apply or be necessary to include).	Optional	Shared Service Center
PPA031.07	Functional		The solution shall enable user (PERSONNELIST) to select/enter multiple legal authority codes when required.	Optional	Shared Service Center
PPA031.08	Functional		The solution shall provide user (PERSONNELIST) the option to delete any legal authority code from a system automated entry.	Mandatory	Shared Service Center
PPA031.09	Functional		The solution shall provide user (PERSONNELIST) the option to delete any system recommended legal authority code(s).	Mandatory	Shared Service Center
PPA031.10	Functional		The solution shall provide user (PERSONNELIST) the option to manually select any legal authority code(s).	Mandatory	Shared Service Center
PPA031.11	Functional		The solution shall provide user (ADMINISTRATOR) the ability to add legal authority codes to the database.	Mandatory	Shared Service Center
PPA031.12	Functional		The solution shall provide user (ADMINISTRATOR) the ability to remove legal authority codes from the database.	Mandatory	Shared Service Center
PPA032	OPM		Ensure required remark codes conform to the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA032.01	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated remarks codes to implement personnel actions on behalf of GSA employees.	Mandatory	Shared Service Center
PPA032.02	Functional		The solution shall enable user (PERSONNELIST) to select OPM designated remarks codes to implement personnel actions on behalf of external employees.	Optional	Shared Service Center
PPA032.03	Functional		The solution shall enable user (PERSONNELIST) to select GSA specific remarks codes to implement personnel actions on behalf of GSA employees.	Mandatory	Shared Service Center
PPA032.04	Functional		The solution shall enable user (PERSONNELIST) to select GSA specific remarks codes to implement personnel actions on behalf of GSA external employees.	Optional	Shared Service Center
PPA032.05	Functional		The solution shall automatically insert required associated remarks codes if a user (PERSONNELIST) selects a specific NOA code (cross-edit capability).	Optional	Shared Service Center
PPA032.06	Functional		The solution shall recommend (optional, selectable) relevant remarks codes if a user (PERSONNELIST) selects a specific NOA code (in cases where remarks codes may or may not apply or be necessary to include).	Optional	Shared Service Center
PPA032.07	Functional		The solution shall enable user (PERSONNELIST) to enter multiple remarks codes when required.	Mandatory	Shared Service Center
PPA032.08	Functional		The solution shall provide user (PERSONNELIST) the option to delete any remarks codes from a system automated entry.	Mandatory	Shared Service Center
PPA032.09	Functional		The solution shall provide user (PERSONNELIST) the option to delete any system recommended remarks code(s).	Mandatory	Shared Service Center
PPA032.10	Functional		The solution shall provide user (PERSONNELIST) the option to manually select any remarks code(s).	Mandatory	Shared Service Center
PPA032.11	Functional		The solution shall provide user (ADMINISTRATOR) the ability to incorporate legal authorities for phased retirement.	Mandatory	Shared Service Center
PPA032.12	Functional		The solution shall provide user (ADMINISTRATOR) the ability to incorporate remarks codes to account for temporary promotions.	Mandatory	Shared Service Center
PPA032.13	Functional		The solution shall provide user (ADMINISTRATOR) the ability to incorporate remarks for detailed employee processing.	Mandatory	Shared Service Center
PPA032.14	Functional		The solution shall provide user (ADMINISTRATOR) the ability to add remarks codes to the database.	Mandatory	Shared Service Center
PPA032.15	Functional		The solution shall provide user (ADMINISTRATOR) the ability to remove remarks codes from the database.	Mandatory	Shared Service Center
PPA033	OPM		Ensure required remark codes conform to the Guide to HR Data Standards.	Mandatory	Shared Service Center
PPA033.01	Functional		Ensure required remark codes conform to the Guide to HR Data Standards, Part A: Human Resources, Remarks - Pages A439 - A466.	Mandatory	Shared Service Center
PPA034	OPM		Ensure required remarks conform to the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA034.01	Functional		Ensure required remarks conform to the Guide to Processing Personnel Actions, Part A: Human Resources, Remarks -Page A438.	Mandatory	Shared Service Center
PPA035	OPM		Ensure required remarks conform to the Guide to HR Data Standards.	Mandatory	Shared Service Center
PPA035.01	Functional		Ensure required remarks conform to the Guide to HR Data Standards, Part A: Human Resources, Remarks -Page A439 - A466.	Mandatory	Shared Service Center
PPA036	OPM		Complete personnel actions IAW the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA036.01	Functional		Solution shall provide a dashboard for user (PERSONNELIST) to monitor the progress (status) of others such as □ APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST, who must complete required actions □ (unopened, opened, in progress, complete).	Optional	Shared Service Center
PPA036.02	Functional		The solution shall provide a dashboard that shows processing progress (completed actions, pending (current) actions, next actions, and remaining actions) that is □ accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
PPA037	OPM		Complete personnel actions IAW the Guide to Personnel Recordkeeping.	Mandatory	Shared Service Center
PPA037.01	Functional		Complete personnel actions IAW the Guide to Personnel Recordkeeping, Section 3-F: Personnel Actions.	Mandatory	Shared Service Center

PPA038	OPM		Post personnel actions IAW the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA038.01	Functional		Post personnel actions IAW the Guide to Processing Personnel Actions, Chapter 1, 1-3. Documenation of Personnel Actions.	Mandatory	Shared Service Center
PPA039	OPM		Post personnel actions IAW the Guide to Personnel Recordkeeping.	Mandatory	Shared Service Center
PPA039.01	Functional		Post personnel actions IAW the Guide to Personnel Recordkeeping, Section 3-F: Personnel Actions.	Mandatory	Shared Service Center
PPA040	OPM		Establish a procedure for suspense file systems IAW the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA040.01	Functional		The solution shall report front-end errors to users (ALL) in real time and enable users to fix problems as part of initial transaction requests.	Optional	Shared Service Center
PPA040.02	Functional		The solution shall provide user (PERSONNELIST) with front-end edit capability (prior to accepting a transaction) to automatically screen document (forms, screens and documents) for errors.	Optional	Shared Service Center
PPA040.03	Functional		The solution shall provide user (PERSONNELIST) with back-end edit capabilities that notify user of any errors prior to releasing suspensed item.	Optional	Shared Service Center
PPA040.04	Functional		The solution shall provide user (PERSONNELIST) with suspense file reports to confirm transactions.	Optional	Shared Service Center
PPA040.05	Functional		The solution shall provide user (PERSONNELIST) with notifications for any suspense files/reports/items that could not be delivered to any receiving database.	Optional	Shared Service Center
PPA040.06	Functional		Solution must provide user (PERSONNELIST) with suspense files/reports/lists of transactions (with error messages) so the user can 'fix' failed transactions.	Optional	Shared Service Center
PPA041	OPM		Support the preparation of documents IAW the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA041.01	Functional		Support the preparation of documents IAW the Guide to Processing Personnel Actions, Subchapter 1, 1-3. Documentation of Personnel Actions.	Mandatory	Shared Service Center
PPA042	OPM		Distribute supporting documents IAW the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA042.01	Functional		Distribute supporting documents IAW the Guide to Processing Personnel Actions, Subchapter 1, 1-3. Documentation of Personnel Actions.	Mandatory	Shared Service Center
PPA043	OPM		File supporting documents submitted IAW the Guide to Personnel Recordkeeping	Mandatory	Shared Service Center
PPA043.01	Functional		The solution shall enable user (PERSONNELIST) access to documents by type, employee, module, HR Action (package type), and organization.	Optional	Shared Service Center
PPA043.02	Functional		The solution shall enable user to receive notification (alerts, prompts) for missing documents in eOPF.	Optional	Shared Service Center
PPA043.03	Functional		The solution shall enable user to receive notification (alerts, prompts) for missing documents that occur after execution of a personnel action.	Optional	Shared Service Center
PPA043.04	Functional		The solution shall enable user to receive notification (alerts, prompts) for missing documents that are required to be stored.	Optional	Shared Service Center
PPA043.05	Functional		The solution shall enable user (SYSTEM ADMINISTRATOR) to manually set required time limits (timers) for documents that are required to be retained (in accordance with the Guide to Personnel Recordkeeping).	Optional	Shared Service Center
PPA043.06	Functional		The solution shall ensure user (PERSONNELIST) can adequately document all human resource management actions/operations.	Optional	Shared Service Center
PPA043.07	Functional		The solution shall ensure user (PERSONNELIST) can deliver accurate and timely records.	Optional	Shared Service Center
PPA043.08	Functional		The solution shall ensure user (PERSONNELIST) can adequately protect records against loss or unauthorized alteration.	Optional	Shared Service Center
PPA043.09	Functional		The solution shall ensure user (PERSONNELIST) can document the employment history of GSA employees and external employees.	Optional	Shared Service Center
PPA043.10	Functional		The solution shall ensure user (PERSONNELIST) can locate all documents/records in the system when necessary.	Optional	Shared Service Center
PPA043.11	Functional		The solution shall ensure user (PERSONNELIST) can retain records as required by General Records Schedules	Optional	Shared Service Center
PPA043.12	Functional		The solution shall ensure user (PERSONNELIST) can dispose of records as required by the General Records Schedule.	Optional	Shared Service Center
PPA043.13	Functional		The solution shall ensure user (SYSTEM ADMINISTRATOR) can secure records against unauthorized access.	Optional	Shared Service Center
PPA044	OPM		File documents created in connection with personnel actions IAW with the Guide to Personnel Recordkeeping.	Mandatory	Shared Service Center
PPA044.01	Functional		The solution shall enable user to file documents in connection with personnel actions IAW the Guide to Personnel Recordkeeping.	Optional	Shared Service Center
PPA044.02	Functional		The solution shall enable user (PERSONNELIST) to access documents by type, employee, HR Action (package), type + organization.	Optional	Shared Service Center
PPA044.03	Functional		The solution shall notify (prompt, alert) user (PERSONNELIST) for deficiencies where personnel documents are missing from personnel folders.	Optional	Shared Service Center
PPA044.04	Functional		The solution shall enable users (PERSONNELIST) to file temporary files.	Optional	Shared Service Center
PPA044.05	Functional		The solution shall enable users (PERSONNELIST) to file permanent files.	Optional	Shared Service Center
PPA044.06	Functional		The solution shall enable users (SYSTEM ADMINISTRATION) to store temporary files for the life of the personnel folder.	Optional	Shared Service Center
PPA044.07	Functional		The solution shall enable users (SYSTEM ADMINISTRATION) to store permanent files for 115 years.	Optional	Shared Service Center
PPA044.08	Functional		The solution shall enable users (PERSONNELIST) to file temporary documents on the left side of the eOPF.	Optional	Shared Service Center
PPA044.09	Functional		The solution shall enable users (PERSONNELIST) to file permanent documents on the right side of the eOPF.	Mandatory	Shared Service Center
PPA044.10	Functional		The solution shall provide users (PERSONNELISTS) with prompts to detail what documents go on what side of the personnel folder.	Mandatory	Shared Service Center
PPA044.11	Functional		The solution shall enable user to screen for prohibited documents.	Mandatory	Shared Service Center
PPA044.12	Functional		The solution shall enable user (PERSONNELIST) to organize documents in chronological order.	Mandatory	Shared Service Center
PPA045	OPM		Obtain signatures in support of personnel actions IAW the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA045.01	Functional		The solution shall provide users (ALL) with electronic signature capability.	Optional	Shared Service Center
PPA045.02	Functional		The solution shall notify users (PERSONNELIST and EMPLOYEE) of any unsigned electronic documents in personnel records.	Optional	Shared Service Center
PPA046	OPM		Obtain approvals for personnel actions IAW the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA046.01	Functional		The solution shall enable user (PERSONNELIST) to automatically route approval requests through pre-established workflow paths that are derived from organizational structure and supervisory chains (contained within the HR IT System).	Mandatory	Shared Service Center
PPA047	OPM		Obtain approvers for personnel actions IAW the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA047.01	Functional		Obtain approvers for personnel actions IAW the Guide to Processing Personnel Actions, Chapter 1, 1-3. Documentation of Personnel Actions.	Mandatory	Shared Service Center
PPA048	OPM		Obtain all required documents for personnel actions IAW the Guide to Processing Personnel Actions.	Mandatory	Shared Service Center
PPA048.01	Functional		The solution shall provide user (PERSONNELIST) with notifications (prompts, alerts and explanations) when completing screens/form entries.	Optional	Shared Service Center
PPA048.02	Functional		The solution shall provide user (EMPLOYEE) with notifications (context-sensitive prompts and alerts) for completing screens/forms.	Optional	Shared Service Center
PPA048.03	Functional		The solution shall provide user (EMPLOYEE) help button to access on-line context-sensitive help information.	Optional	Shared Service Center
PPA048.04	Functional		The solution shall provide user (EMPLOYEE) help button to access HR help-desk chat.	Optional	Shared Service Center
PPA048.05	Functional		System must provide "help-desk" assistance button that connects user (EMPLOYEE) to help via email.	Optional	Shared Service Center
PPA048.06	Functional		The solution shall provide users (SYSTEM ADMINISTRATION) with ability to modify context-sensitive help prompts.	Optional	Shared Service Center
PPA048.07	Functional		The solution shall notify user (EMPLOYEE) of any incorrect or incomplete fields during the form/document completion process.	Optional	Shared Service Center
PPA048.08	Functional		Solution must notify the user (PERSONNELIST) of any incomplete fields when documents/forms are completed/transmitted by the employee/applicant.	Optional	Shared Service Center

PPA048.09	Functional		Solution must enable user (PERSONNELIST) to screen documents and automatically report incomplete required data fields upon receipt of documents from employees.	Optional	Shared Service Center
PPA048.10	Functional		The solution shall provide a dashboard for user (PERSONNELIST) to monitor (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) progress (status) completing required forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
PPA048.11	Functional		The solution shall provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
PPA060.01	Functional		The solution shall enable user (SYSTEM ADMINISTRATOR) with the ability to switch (on/off) capability to accommodate external agencies who will continue to maintain their own eOPF Requirements.	Optional	Shared Service Center
PPA061	OPM		Support the agency in responding to requests for information on Federal employees IAW Chapter 6 of the Guide to Personnel Recordkeeping.	Mandatory	Shared Service Center
PPA061.01	Functional		Support the agency in responding to requests for information on Federal employees IAW the Guide to Personnel Recordkeeping, Chapter 6, How to Respond to Requests for Information, Page 6-1.	Mandatory	Shared Service Center
PPA062	OPM		Support the agency in responding to requests for information on former employees (for information from Employee Medical Folders and personnel folders) IAW Chapter 6 of the Guide to Personnel Recordkeeping.	Mandatory	Shared Service Center
PPA062.01	Functional		Support the agency in responding to requests for information on former employees (for information from Employee Medical Folders and personnel folders) IAW the Guide to Personnel Recordkeeping, Chapter 6, Page 6-2.	Mandatory	Shared Service Center
PPA066	OPM		Collect data in the format required by the Guide to HR Data Standards.	Mandatory	Shared Service Center
PPA066.01	Non-functional	Technical Specification	The solution shall provide user (PERSONNELIST) with an automated method to flow information between eOPF and HR System.	Optional	Shared Service Center
PPA066.02	Non-functional	Technical Specification	The solution shall provide user (PERSONNELIST) with a centralized automated process to eliminate duplication of effort created by HR system demands and eOPF (OPM) demands. (Currently HR demands and eOPF data and content demands are managed separately which generates a lot of unnecessary parallel manual work.)	Optional	Shared Service Center
PPA066.03	Non-functional	Technical Specification	The solution shall provide an interface or internal capability to enable these two sets of requirements (eOPF data demands and HR data demands) to be managed as one entity so that the PERSONNELIST can source eOPF content and HR content from the same system without having to manually regenerate similar (often identical) content to fulfill data demands from various receivers (employees and OPM).	Optional	Shared Service Center
PPA066.04	Non-functional	Technical Specification	The solution shall enable user (PERSONNELIST) to flow data to eOPF and report required items to OPM as an automated process.	Optional	Shared Service Center
PPA066.05	Non-functional	Technical Specification	The solution shall enable user (PERSONNELIST) to maintain a master schedule (list) of required OPM data items; identifying, extracting, and forwarding these items as an automated process.	Optional	Shared Service Center
PPA066.06	Non-functional	Technical Specification	The solution shall provide user with manual capability to forward items to OPM upon request- either singular items or batch requirements.	Optional	Shared Service Center
PPA066.07	Functional		The solution shall provide user with a dashboard showing workflow of items transmitted and received by OPM. Requirement is for alerts when things are due/transmitted/received.	Optional	Shared Service Center
PPA066.08	Functional		The solution shall provide user (PERSONNELIST) with automated alerts when requirements are due to OPM.	Optional	Shared Service Center
PPA066.09	Functional		The solution shall provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
PPA066.10	Functional		Solution must generate automated reports to meet OPM data demands and report status of reports provided.	Optional	Shared Service Center
PPA067	OPM		Report data IAW the Guide to Human Resources Data Reporting.	Mandatory	Shared Service Center
PPA067.01	Functional		Report data IAW the Guide to Human Resources Data Reporting. OPM Website: https://www.opm.gov/policy-data-oversight/data-analysis-documentation/data-policy-guidance/#url=Data-Reporting-Guidance	Mandatory	Shared Service Center
PPA068	OPM		Edit data IAW the Guide to Human Resources Data Editing.	Mandatory	Shared Service Center
PPA068.01	Functional		Edit data IAW the Guide to Human Resources Data Editing. Data, Analysis & Documentation, Data Standards, OPM Website - https://ehr.nbc.gov/datastandards/list	Mandatory	Shared Service Center
PPA068.02	Functional		The solution shall enable user (PERSONNELIST) with the capability to screen user entries and alert user of potential errors in submission data information in forms/documents.	Optional	Shared Service Center
PPA068.03	Functional		The solution shall enable user (PERSONNELIST) to detect errors through automated system nomination of omissions and incongruent information so errors can be reviewed and resolved as part of initial transaction processing.	Optional	Shared Service Center
PPA068.04	Functional		The solution shall enable user (PERSONNELIST) to detect errors made by the user (submitter/employee/applicant) and to notify the PERSONNELIST of any errors, anomalies and/or incongruent/missing information when data is initially transmitted/received so that problems can be immediately resolved.	Optional	Shared Service Center
PPA068.05	Functional		The solution shall enable user (PERSONNELIST) to receive appropriate alerts/prompts to address due and overdue items.	Optional	Shared Service Center
PPA068.06	Functional		The solution shall provide prompts to users (employees/applicants/managers/supervisors) that are providing information in collected forms so that data collection anomalies can be minimized.	Optional	Shared Service Center
PPA068.07	Functional		The solution shall provide user (ALL) access to a help button that connects to a help-desk capability.	Optional	Shared Service Center
PPA068.08	Functional		The solution shall provide user (PERSONNELIST) manual data edit capability to manually adjust data submitted by employees/applicants/managers/supervisors, when necessary. Access must be controlled by assigned roles.	Optional	Shared Service Center
PPA068.09	Functional		Solution must interface with OPM in order to resolve EHRI files rejections due to errors. (This will require interaction with OPM to determine their expected reporting format and enable OPM and others to review GSA requests in a timely manner.) System needs to provide automated alerts to GSA HR and OPM representatives for processing delays and incomplete information regarding EHRI correction requests.	Optional	Shared Service Center
PPA068.11	Functional		Solution must provide interface capability for data warehousing requirements.	Mandatory	Shared Service Center
PPA069	OPM		Implement Nature of Action changes issued in changes to the Guide to Processing Personnel Actions within 60 days of issuance of the GPPA change.	Mandatory	Shared Service Center
PPA070	OPM		Implement Authority Code changes issued in changes to the Guide to Processing Personnel Actions within 60 days of issuance of the GPPA change.	Mandatory	Shared Service Center
PPA071	OPM		Implement remark changes issued in changes to the Guide to Processing Personnel Actions within 60 days of issuance of the GPPA change.	Mandatory	Shared Service Center
PPA072	OPM		Implement system changes (other than NOA Authority Code and Remark changes) necessitated by changes to the Guide to Processing Personnel Actions within 180 days of issuance of the GPPA change.	Mandatory	Shared Service Center
PPA073	OPM		Implement changes to recordkeeping practices issues in changes to the Guide to Personnel Recordkeeping within 60 days of the issuance of the GPR change.	Mandatory	Shared Service Center
PPA074	OPM		Implement table changes necessitated by changes to the Guide to Data Standards within 60 days of issuance of the GDS change.	Mandatory	Shared Service Center
PPA075	OPM		Implement system changes necessitated by changes to the Guide to Data Standards within 180 days of issuance of the GDS change.	Mandatory	Shared Service Center
PPA075.01	Non-functional	Technical Specification	The solution shall provide ability for users (SYSTEM ADMINISTRATOR) to receive automated notification of changes pending and changes completed.	Optional	Shared Service Center
PPA076	OPM		Implement table changes necessitated by changes to the Guide to HR Reporting within 60 days of issuance of the GHRR change.	Mandatory	Shared Service Center
PPA077	OPM		Implement system changes necessitated by changes to the Guide to HR Reporting within 180 days of issuance of the GHRR change.	Mandatory	Shared Service Center
PPA078	OPM		Implement table changes necessitated by changes to the Guide to Data Edits within 60 days of issuance of the GDE change.	Mandatory	Shared Service Center
PPA079	OPM		Implement system changes necessitated by changes to the Guide to Data Edits within 180 days of issuance of the GDE change.	Mandatory	Shared Service Center
PPA080	OPM		Move candidate data to employee data upon entry of the appointment personnel action.	Mandatory	Shared Service Center
PPA080.01	Functional		The solution shall provide integration between candidate record repository and employee (EMPLOYEE) data repository	Optional	Shared Service Center
PPA080.02	Functional		The solution shall auto-populate available user (EMPLOYEE) personal record from candidate record upon initiation of a new appointment personal action. Personal data shall include name, SSN, Salary level, Start date, Veterans Preference, Employment Type, Gender, Ethnicity, Handicap code, Date of Birth, and Type of Employment.	Mandatory	Shared Service Center

PPA080.03	Functional		The solution shall auto-populate available user (EMPLOYEE) position data from candidate record upon initiation of a new appointment personal action. Position data shall include: Supervisory Status, Entry-Level Code, Work Schedule, Pay Status, Bargaining Unit Status, Pay Table, Personnel Office ID, Employment Category, Position Sensitivity, Key Emergency Essential status, Occupation Category Code, and Functional Class.	Mandatory	Shared Service Center
PPA081	OPM		Automatically delete the WGI due date when an employee converts from a permanent to a temporary appointment .	Mandatory	Shared Service Center
PPA081.01	Functional		Automatically delete the WGI due date when an employee converts from a permanent to a temporary appointment IAW Code of Federal Regulations (CFR) 531.404 - Earning within-grade increase.	Mandatory	Shared Service Center
PPA082	OPM		Allow users to initiate personnel actions in a secure automated solution.	Mandatory	Shared Service Center
PPA082.01	Functional		Solution provides users (EMPLOYEE, SUPERVISOR, PERSONNELIST) ability to self-initiate limited set of personnel actions IAW role based permissions	Optional	Shared Service Center
PPA082.02	Functional		The solution shall be able to uniquely and securely authenticate user (EMPLOYEE) before processing self-service initiated personnel actions.	Optional	Shared Service Center
PPA082.03	Functional		The solution shall support digital signature of self-initiated personnel actions by both the user (EMPLOYEE, SUPERVISOR, PERSONNELIST) and corresponding approving official	Optional	Shared Service Center
PPA082.04	Functional		The solution shall provide secure access to employee data, protecting all PII to appropriate Federal levels.	Mandatory	Shared Service Center
PPA082.05	Functional		The solution shall enforce role based permissions, ensuring a user (EMPLOYEE) has secure access to just their own profile in Self Service Personnel Actions, and SUPERVISOR view/edit access for individuals supervised. The system shall have the capability to support restricting PERSONNELIST access to the lowest level necessary to execute duties.	Optional	Shared Service Center
PPA082.06	Functional		The solution shall support configurable, automated workflow process for complex actions.	Optional	Shared Service Center
PPA082.07	Functional		The solution shall provide a dashboard showing status of personnel actions requested, constraining viewable data IAW role based permissions and user identity (DIRECTORS, PERSONNELISTS, and EMPLOYEES will have different views)	Optional	Shared Service Center
PPA082.08	Functional		The solution is required to automatically route approval requests through pre-established workflow paths that are derived from organizational structure and supervisory chains (contained within the HR IT System). Manual overrides are required to enable support specialists (PERSONNELIST) to provide manual routing when there are system reporting chain errors or other anomalies.	Optional	Shared Service Center
PPA082.09	Functional		The solution shall enable providing Notifications (alerts) to approvers (SUPERVISORS) and PERSONNELISTS as part of routing requirement (to show that requests have been received/approved by the approver).	Optional	Shared Service Center
PPA082.10	Functional		Solution must provide PERSONNELISTS the ability to see all notifications / alerts and approval requests and be alerted when requests are unfulfilled/incomplete. The system shall alert HR of any deficiencies.	Optional	Shared Service Center
PPA082.11	Functional		The solution must provide a dashboard for users (PERSONNELISTS, SUPERVISORS, DIRECTORS) showing the status of approval requests (actions completed and actions remaining). Viewable data shall be constrained IAW role-based permissions	Optional	Shared Service Center
PPA082.12	Functional		Solution provides user (EMPLOYEE) ability to self-initiate the following personnel action: Name Change	Optional	Shared Service Center
PPA082.13	Functional		Solution provides user (EMPLOYEE) ability to self-initiate the following personnel action: Resignation or Retirement	Optional	Shared Service Center
PPA082.14	Functional		Solution provides user (EMPLOYEE) ability to self-initiate requesting the following personnel action: Work Schedule Change	Optional	Shared Service Center
PPA082.15	Functional		Solution provides user (EMPLOYEE) ability to self-initiate the following personnel action: Non-Pay / Duty Status	Optional	Shared Service Center
PPA082.16	Functional		Solution provides user (EMPLOYEE) ability to self-initiate the following personnel action: Return to Duty	Optional	Shared Service Center
PPA082.17	Functional		Solution provides user (EMPLOYEE) ability to self-initiate requesting the following personnel action for Leave without Pay (LWOP): Extension of Not to Exceed (NTE)	Optional	Shared Service Center
PPA082.18	Functional		Solution provides user (MANAGER) ability to self-initiate requesting the following personnel action: Award One-Time Payment	Optional	Shared Service Center
PPA082.19	Functional		Solution provides user (MANAGER) ability to self-initiate requesting the following personnel action: Change to Lower Grade (for conclusion of a temporary promotion)	Optional	Shared Service Center
PPA082.20	Functional		Solution provides user (MANAGER) ability to self-initiate requesting the following personnel action: Reassignment	Optional	Shared Service Center
PPA082.21	Functional		Solution provides user (MANAGER) ability to self-initiate the following personnel action IAW GPPA: Data Element Change	Optional	Shared Service Center
PPA082.22	Functional		Solution provides user (MANAGER) ability to self-initiate requesting the following personnel action: Duty Station Change	Optional	Shared Service Center
PPA082.23	Functional		Solution provides user (EMPLOYEE) ability to view current status of personnel actions which that user has initiated	Optional	Shared Service Center
PPA082.24	Functional		Solution provides user (SUPERVISOR) ability to view current status of personnel actions initiated by direct reports	Optional	Shared Service Center
PPA082.25	Functional		Solution provides user (EMPLOYEE) ability to self-initiate the following personnel action: Request for LWOP	Optional	Shared Service Center
PPA082.26	Functional		Solution provides user (EMPLOYEE) ability to self-initiate requesting the following personnel action: Extension of LWOP	Optional	Shared Service Center
PPA082.27	Functional		Solution provides user (MANAGER, EMPLOYEE) ability to self-initiate requesting the following personnel action: Return to Duty	Optional	Shared Service Center
PPA083	OPM		Allow users to initiate personnel actions in a secure automated web-based solution.	Mandatory	Shared Service Center
PPA083.01	Functional		The solution shall provide users (EMPLOYEE, SUPERVISOR) the ability to initiate personnel actions in a secure automated web-based solution.	Optional	Shared Service Center
PPA084	OPM		Allow users to edit personnel action data to a secure automated solution.	Mandatory	Shared Service Center
PPA084.01	Functional		The solution shall enable a user (EMPLOYEE) to edit their own personnel action data in a secure automated solution.	Optional	Shared Service Center
PPA084.02	Functional		The solution shall enable user (SUPERVISOR) to edit personnel action data in a secure automated solution for employees they supervise	Optional	Shared Service Center
PPA084.03	Functional		The solution shall enable user (PERSONNELIST) to edit personnel action data in a secure automated solution for employees they support.	Optional	Shared Service Center
PPA084.04	Functional		The solution shall support clear association of user names and roles with edits made to the personnel actions, and shall be capable of supporting future audit requirements	Optional	Shared Service Center
PPA085	OPM		Allow users to edit personnel action data to a secure automated web-based solution.	Optional	Shared Service Center
PPA085.01	Functional		The solution shall provide users (EMPLOYEE, SUPERVISOR, PERSONNELISTS) the ability to edit personnel action data in a secure automated web-based solution.	Optional	Shared Service Center
PPA085.02	Functional		The system shall provide the ability to restrict fields that can be edited by user role (EMPLOYEE, SUPERVISOR, DIRECTOR, PERSONNELIST, HR IT SPECIALIST)	Optional	Shared Service Center
PPA085.03	Functional		The solution shall support automated workflow process for complex actions.	Optional	Shared Service Center
PPA085.04	Functional		The solution shall provide SUPERUSERS the capability to determine which data fields can be altered by a USER after SUPERVISOR-approval, and associate a workflow process to approve changes	Optional	Shared Service Center
PPA085.05	Functional		The solution shall provide a dashboard showing the status of edit/ approval requests (actions completed and actions remaining).	Optional	Shared Service Center
PPA086	OPM		Display information tailored to the role of the user.	Mandatory	Shared Service Center
PPA086.01	Functional		The solution will provide the ability to display information IAW various user types (EMPLOYEE, SUPERVISOR, DIRECTOR, PERSONNELIST, SUPERUSER, HR IT SPECIALIST), constraining PII access accordingly	Optional	Shared Service Center
PPA086.02	Functional		The solution will provide the ability for SUPERUSERS to grant / restrict access to system modules IAW role-based access	Optional	Shared Service Center
PPA086.03	Functional		The solution will provide the ability for SUPERUSERS to grant / restrict access to specific Views or screens within system modules IAW role-based access	Optional	Shared Service Center
PPA086.04	Functional		The solution will provide the ability for SUPERUSERS to grant / restrict access to specific data fields within system modules IAW role-based access	Optional	Shared Service Center
PPA086.05	Functional		The solution will provide SUPERUSERS with ability to add / delete additional roles (beyond EMPLOYEE, SUPERVISOR, DIRECTOR, PERSONNELIST, HR IT SPECIALIST, SUPERUSER), and clearly identify their permissions	Optional	Shared Service Center
PPA086.06	Functional		The solution will provide the ability for SUPERUSERS and HR IT SPECIALISTS to view all roles and associated permissions, and generate report of this data	Optional	Shared Service Center

PPA086.07	Functional		The solution will support role-based configuration and generation of reports	Optional	Shared Service Center
PPA086.08	Functional		The solution will provide a dashboard capability for limited users (PERSONNELIST, SUPERUSER) to display user population by roles, and associated population. The dashboard will provide the ability to drill down to specific users associated with each role.	Optional	Shared Service Center
PPA086.09	Functional		The solution shall support ability for SUPERUSER to design and reconfigure a View (data fields displayed and structure of the page) to better support HR needs	Optional	Shared Service Center
PPA087	OPM		Facilitate completion of online personnel action through menu-driven drop down boxes and lists of values with descriptions; values may vary by action.	Optional	Shared Service Center
PPA087.01	Functional		The solution shall enable ability for users (SUPERUSER) to create and associate a list of values with "drop-down box" variables	Optional	Shared Service Center
PPA087.02	Functional		The solution shall provide for ability to define / associate list items with data fields to be delegated by role and individual (e.g. SUPERUSER delegating permission to define a specific variable to an HR IT Specialist).	Optional	Shared Service Center
PPA087.03	Functional		The solution shall enable constraints to limit the number of individuals with the ability to change the definition of any particular drop-down list.	Optional	Shared Service Center
PPA087.04	Functional		The solution shall enable users (EMPLOYEE, SUPERVISOR, PERSONNELIST) to complete online personnel actions by selecting from drop-down boxes and lists	Optional	Shared Service Center
PPA087.05	Functional		The solution shall support capability for selection of one drop-down option to drive auto-population of other fields	Optional	Shared Service Center
PPA088	OPM		Prepopulate existing applicable employee information.	Optional	Shared Service Center
PPA088.01	Functional		The solution will provide the ability to prepopulate existing applicable employee information from the employee records and position management records when initiating / completing personnel actions.	Optional	Shared Service Center
PPA088.02	Functional		The solution will interface the Personnel Action Processing module with the HR personnel records and will support pre-population of applicable EMPLOYEE data into the personnel action record	Optional	Shared Service Center
PPA088.03	Functional		The solution will interface Personnel Action Processing module with the HR personnel records and Position Management module and will support pre-population of applicable SUPERVISOR data into the personnel action record	Optional	Shared Service Center
PPA089	OPM		Prepopulate position data.	Mandatory	Shared Service Center
PPA089.01	Functional		The solution will interface Personnel Action Processing module with the HR personnel records and Position Management module and will support pre-population of applicable position and occupation data into the personnel action record	Optional	Shared Service Center
PPA090	OPM		Integrate personnel data (such as applicant data) with the personnel system.	Optional	Shared Service Center
PPA091	OPM		Display corresponding related legal authorities after NOA is selected.	Mandatory	Shared Service Center
PPA091.01	Functional		The solution shall automatically identify possible corresponding legal authority codes and remarks codes to be included as part of the requested action when a nature of action (NOA) is selected.	Mandatory	Shared Service Center
PPA091.02	Functional		The solution shall enable selection of one or more related legal authority codes and remarks codes when a Nature of Action (NOA) code is selected as part of the requested action.	Mandatory	Shared Service Center
PPA092	OPM		Allow users to select from possible personnel action remarks.	Mandatory	Shared Service Center
PPA092.01	Functional		The solution shall enable user (EMPLOYEE, SUPERVISOR, PERSONNELIST) to select from drop-down list of pre-created personnel action remarks when completing the personnel action.	Optional	Shared Service Center
PPA092.02	Functional		The solution shall maintain association between comment selected and individual selecting it	Optional	Shared Service Center
PPA092.03	Functional		The solution shall provide capability for user (EMPLOYEE, SUPERVISOR, PERSONNELIST) to provide free text if the relevant option is not in the drop-down list	Mandatory	Shared Service Center
PPA092.04	Functional		The solution shall support basic analytics and trend analysis of drop-down data.	Optional	Shared Service Center
PPA092.05	Functional		The solution shall enable reporting to HR SUPERVISORS of personnel actions taken by PERSONNELISTS (e.g. quarterly basis)	Optional	Shared Service Center
PPA093	OPM		Edit data entered against business rules based on previously entered data.	Mandatory	Shared Service Center
PPA093.01	Functional		The solution shall provide limited users (PERSONNELIST, EMPLOYEE) the ability to edit data that has been pre-populated IAW established business rules	Mandatory	Shared Service Center
PPA093.02	Functional		The solution shall maintain a history of changes made to data in a personnel action	Optional	Shared Service Center
PPA093.03	Functional		The solution shall support "cross-editing" between screens and modules, where edits provided in one automatically flow to linked modules (e.g. for NOAs, remarks links, etc.)	Mandatory	Shared Service Center
PPA093.04	Functional		The solution shall provide a review/approve function before accepting conflicting data flowing from a different module.	Optional	Shared Service Center
PPA093.05	Functional		The solution shall be capable of exporting cross-edited data (e.g. supporting unique tables and rules for NCUA)	Mandatory	Shared Service Center
PPA093.06	Functional		The solution shall maintain association between edits in Personnel actions and user making edit	Optional	Shared Service Center
PPA094	OPM		Provide online help.	Mandatory	Shared Service Center
PPA094.01	Functional		The solution shall provide access to online help for supported population (EMPLOYEE, SUPERVISOR, PERSONNELIST, DIRECTOR)	Mandatory	Shared Service Center
PPA094.02	Functional		The solution shall provide infrastructure to support online help targeted to the various tiers and roles of users (EMPLOYEE, SUPERVISOR, PERSONNELIST, DIRECTOR)	Mandatory	Shared Service Center
PPA094.03	Functional		The solution shall provide content to support online help targeted to the various tiers and roles of users (EMPLOYEE, SUPERVISOR, PERSONNELIST, DIRECTOR)	Mandatory	Shared Service Center
PPA095	OPM		Provide online navigation instructions.	Mandatory	Shared Service Center
PPA095.01	Functional		The solution shall provide users (EMPLOYEE, SUPERVISOR) with access to online navigation instructions for accessing, viewing, and utilizing the HR system.	Mandatory	Shared Service Center
PPA095.02	Functional		The solution shall provide users (EMPLOYEE, SUPERVISOR) with online navigation instructions tailored to accessing, viewing, and utilizing the HR system IAW with roles.	Mandatory	Shared Service Center
PPA095.03	Functional		The solution shall provide users (EMPLOYEE, SUPERVISOR) with online navigation instructions tailored to accessing, viewing, and utilizing the various HR modules.	Mandatory	Shared Service Center
PPA095.04	Functional		The solution shall provide online training for processing personnel actions.	Optional	Shared Service Center
PPA095.05	Functional		The solution shall support provision of user guides (on use of the system) for HR system modules requiring user interaction	Optional	Shared Service Center
PPA095.06	Functional		The solution shall support provision of "process training" (training on the process being performed) for HR system modules requiring user interaction.	Optional	Shared Service Center
PPA095.07	Functional		The solution will integrate interactive training components for system usage.	Optional	Shared Service Center
~~PPA095.08~~	~~Functional~~		~~The solution shall provide help desk support for system functions~~	~~Optional~~	~~Shared Service Center~~
PPA096	OPM		Provide online training for processing personnel actions.	Optional	Shared Service Center
PPA096.01	Functional		Provide online training for processing personnel actions as referenced in the Business Reference Model for the following Activity IDs and Activities: 3.6.6 Bring Candidate On Board; 5.3.1 Identify Employees to Receive Pay or Leave Change; 2.1.12 Implement Appeal Decision; 2.1.6 Maintain Positions; 5.2.3 Set Bonus or Award Pay.	Optional	Shared Service Center
PPA097	OPM		Allow a user to save a personnel action in progress at any time prior to completion.	Mandatory	Shared Service Center
PPA097.01	Functional		The solution shall enable a user (EMPLOYEE, SUPERVISOR, PERSONNELIST) to save a personnel action in progress at any time prior to completion.	Mandatory	Shared Service Center
PPA097.02	Functional		The solution shall automatically save a personnel action in progress at any time prior to completion.	Mandatory	Shared Service Center
PPA098	OPM		Allow a user to retrieve a personnel action in progress at any time	Mandatory	Shared Service Center
PPA098.01	Functional		The solution shall enable a user (EMPLOYEE, SUPERVISOR, PERSONNELIST) to retrieve a personnel action in progress at any time	Optional	Shared Service Center
PPA098.02	Functional		The solution shall enable a user (EMPLOYEE, SUPERVISOR, PERSONNELIST) to re-open and edit an incomplete personnel action from the saved point.	Optional	Shared Service Center
PPA098.03	Functional		The solution shall provide user (EMPLOYEE, SUPERVISOR, PERSONNELIST) a report of current personnel actions in-process and their current status (IAW role-based access).	Optional	Shared Service Center
PPA098.04	Functional		The solution shall provide user (EMPLOYEE, SUPERVISOR, PERSONNELIST) with notifications / alerts on incomplete personnel actions that require further action.	Optional	Shared Service Center

PPA098.05	Functional		The solution shall provide a user (EMPLOYEE, SUPERVISOR, PERSONNELIST) with shortcuts to "actions to be completed" from the main screen	Optional	Shared Service Center
PPA098.06	Functional		The solution shall permit multiple users (EMPLOYEE, SUPERVISOR, PERSONNELIST, DIRECTOR, HR IT SPECIALIST) simultaneous view-only access to a single document, based on user roles and permissions as defined by GSA.	Optional	Shared Service Center
PPA098.07	Functional		The solution shall only permit one user to edit a document at a time (i.e. no simultaneous editing), based on user roles and permissions as defined by GSA.	Optional	Shared Service Center
PPA099	OPM		Allow for multiple personnel actions for a single employee in one pay period and/or on the same day.	Mandatory	Shared Service Center
PPA099.01	Functional		The solution shall enable multiple personnel actions to be processed for a single employee in one pay period.	Mandatory	Shared Service Center
PPA099.02	Functional		The solution shall enable multiple personnel actions to be processed for a single employee on the same day.	Mandatory	Shared Service Center
PPA099.03	Functional		The solution shall enable reporting of personnel actions in-progress and completed by pay period	Optional	Shared Service Center
PPA099.04	Functional		The solution shall enable reporting of personnel actions in-progress and completed across pay periods	Optional	Shared Service Center
PPA100	OPM		The system must be able to process personnel actions in accordance with the GPPA.	Mandatory	Shared Service Center
PPA100.01	Functional		The solution shall support role-based access for processing personnel actions in accordance with the OPM Guide to Processing Payroll Actions (GPPA).	Mandatory	Shared Service Center
PPA100.02	Functional		The solution shall provide process workflows for processing personnel actions in accordance with the OPM Guide to Processing Payroll Actions (GPPA).	Mandatory	Shared Service Center
PPA100.03	Functional		The solution shall be able to process personnel actions in accordance with the OPM Guide to Personnel Data Standards	Mandatory	Shared Service Center
PPA100.04	Functional		The solution shall be able to process personnel actions in accordance with the OPM Guide to Personnel Record Keeping	Mandatory	Shared Service Center
PPA101	OPM		Allow for verification of reinstatement eligibility of former Federal employees.	Mandatory	Shared Service Center
PPA101.01	Functional		The solution shall support verification of reinstatement eligibility of former Federal employees who have a) held a "career or career-conditional appointment at some time in the past" and b) qualify for Veterans preference	Optional	Shared Service Center
PPA101.02	Functional		The solution shall support verification of reinstatement eligibility of former Federal employees who have a) held a "career or career-conditional appointment at some time in the past" and b) acquired career tenure by completing 3 years of substantially continuous creditable service	Optional	Shared Service Center
PPA101.03	Functional		The solution shall support verification of reinstatement eligibility of former Federal employees who have eligibility extended in accordance with OPM Hiring Authority: Reinstatement" guidance	Optional	Shared Service Center
PPA101.04	Functional		The solution shall enable former Federal employees who have been verified as "reinstatement eligible" to apply for Federal jobs open only to status candidates.	Optional	Shared Service Center
PPA101.05	Functional		The solution shall enable former Federal employees who have been verified as "reinstatement eligible" to have access to existing services for reentering the Federal competitive service workforce without competing with the public	Optional	Shared Service Center
PPA102	OPM		Allow for integration of prior military service (EOD).	Mandatory	Shared Service Center
PPA102.01	Functional		The solution shall support integration of prior military service records into the eOPF during Entrance on Duty (EOD) processing and onboarding	Mandatory	Shared Service Center
PPA102.02	Functional		The solution shall support EOD self-certification requirements and Interconnection Security Agreement requirements	Mandatory	Shared Service Center
PPA102.03	Functional		The solution shall format data IAW EOD Requirements specifications prior to transmitting data for EOD	Mandatory	Shared Service Center
PPA102.04	Functional		The solution shall integrate variables based on prior service (e.g. longer leave accruals, impact to Service Computation Dates for leave and retirement) during EOD.	Mandatory	Shared Service Center
PPA103	OPM		Support transfer of multiple employees from one agency to another (e.g."transfer of function").	Mandatory	Shared Service Center
PPA103.01	Functional		The solution shall provide a method to identify (tag) a block of multiple employees for a future personnel action, by an identifying characteristic (e.g. organization, office, supervisor, occupational series, etc.)	Optional	Shared Service Center
PPA103.02	Functional		The solution shall provide a method to individually identify (tag) multiple employees for a future personnel action	Optional	Shared Service Center
PPA103.03	Functional		The solution shall provide a capability for select users (identified via Role-based permissions) to transfer multiple employees that have been "tagged" for a group personnel action between agencies.	Optional	Shared Service Center
PPA103.04	Functional		The solution shall provide select users (PERSONNELISTS, SUPERUSERS) with the role-based permissions to transfer multiple employees between organizations	Mandatory	Shared Service Center
PPA103.05	Functional		The solution shall support initiation and execution of an automated process workflow when employees transfer between agencies to out-process them from the losing organization	Optional	Shared Service Center
PPA103.06	Functional		The solution shall support initiation and execution of an automated process workflow when employees transfer between agencies to in-process them to the gaining organization	Optional	Shared Service Center
PPA103.07	Functional		The solution shall support summary reporting of all personnel actions associated with the transfer of multiple employees	Optional	Shared Service Center
PPA103.08	Functional		The solution shall provide notifications / alerts to relevant processing offices (PERSONNELISTS) associated with process workflows to out-process/in-process employees when transferring employees between agencies	Optional	Shared Service Center
PPA104	OPM		Support all types of employment (e.g. full-time part-time etc.).	Mandatory	Shared Service Center
PPA104.01	Functional		The solution shall support personnel actions for full-time General Schedule (GS, GM, GL, GP, GR) employees	Mandatory	Shared Service Center
PPA104.02	Functional		The solution shall support personnel actions for part-time General Schedule (GS, GM, GL, GP, GR) employees	Mandatory	Shared Service Center
PPA104.03	Functional		The solution shall support personnel actions for intermittent General Schedule (GS, GM, GL, GP, GR) employees	Mandatory	Shared Service Center
PPA104.04	Functional		The solution shall support personnel actions for Federal Wage System (FWS) employees (corresponding pay plans include WS, WG, WL).	Mandatory	Shared Service Center
PPA104.05	Functional		The solution shall support personnel actions for Senior Executive Service (SES) employees	Mandatory	Shared Service Center
PPA104.06	Functional		The solution shall support personnel actions for scientific and professional (ST) employees	Mandatory	Shared Service Center
PPA104.07	Functional		The solution shall support personnel actions for Senior Level (SL) employees	Mandatory	Shared Service Center
PPA104.08	Functional		The solution shall support personnel actions for all Title V employees	Mandatory	Shared Service Center
PPA104.09	Functional		The solution shall support data flows for position management between an organization providing an employee "on detail" (from organization) and the organization receiving the employee (home organization)	Optional	Shared Service Center
PPA104.10	Functional		The solution shall support personnel actions for employees "on detail" from one organization to another	Mandatory	Shared Service Center
PPA104.11	Functional		The solution shall support position management reporting of employees on detail.	Optional	Shared Service Center
PPA104.12	Functional		The solution shall support data flows for reporting of employees on detail and personnel actions associated.	Optional	Shared Service Center
PPA105	OPM		Support assignments to all Federal jobs (e.g. competitive excepted foreign nationals).	Mandatory	Shared Service Center
PPA105.01	Functional		The solution shall support job assignment processing and workflows for employees being assigned within the system	Mandatory	Shared Service Center
PPA105.02	Functional		The solution shall support job assignment processing and workflows for applicants being assigned within the system as part of onboarding	Optional	Shared Service Center
PPA106	OPM		Automatically generate personnel actions based on suspense dates.	Mandatory	Shared Service Center
PPA106.01	Functional		The solution shall automatically initiate personnel actions based on suspense dates.	Mandatory	Shared Service Center
PPA106.02	Functional		The solution shall support limited automatically generated personnel actions based on suspense dates (e.g. WGIs, change to lower grade upon termination of temporary appointment, suspensions, return to duty)	Optional	Shared Service Center
PPA106.03	Functional		The solution shall initiate automated process workflows for the personnel action initiated on the basis of suspense date.	Optional	Shared Service Center

PPA106.04	Functional		The solution shall integrate alerts / notifications to responsible parties as part of automated process workflow initiated for personnel actions	Optional	Shared Service Center
PPA107	OPM		Handle mass change actions via list (e.g. reorganization transfer work pay adjustment).	Mandatory	Shared Service Center
PPA107.01	Functional		The solution will provide select users (SUPERUSERS, PERSONNELISTS) the ability to transfer groups of employees between organizations via upload of a list	Mandatory	Shared Service Center
PPA107.02	Functional		The solution shall provide a method to identify (tag) a block of multiple employees for a future personnel action, by an identifying characteristic (e. g. organization, office, supervisor, occupational series, etc.)	Optional	Shared Service Center
PPA107.03	Functional		The solution shall provide a method to individually identify (tag) multiple employees for a future personnel action	Optional	Shared Service Center
PPA107.04	Functional		The solution shall provide a capability for select users (identified via Role-based permissions) to transfer multiple employees that have been "tagged" for a group personnel action between organizations.	Optional	Shared Service Center
PPA107.05	Functional		The solution shall provide select users (SUPERUSERS) the ability to transfer a sub-group (group of positions) to another organization	Optional	Shared Service Center
PPA107.06	Functional		The solution shall support automatically transferring the group of assigned personnel when a group of positions is transferred between organizations	Optional	Shared Service Center
PPA107.07	Functional		The solution shall support reporting of all personnel actions involved in a bulk transfer of employees	Optional	Shared Service Center
PPA108	OPM		Permit personnel actions with future effective dates to be entered.	Mandatory	Shared Service Center
PPA108.01	Functional		The solution shall permit PERSONNELISTS to enter personnel actions with future effective dates.	Mandatory	Shared Service Center
PPA109	OPM		Permit personnel actions with future effective dates to be processed.	Mandatory	Shared Service Center
PPA109.01	Functional		The solution shall permit support personnel (PERSONNELIST, FINANCE SPECIALIST) to process personnel actions with future effective dates.	Mandatory	Shared Service Center
PPA109.02	Functional		The solution shall automatically update the personnel action when an entered "Future Effective Date" is reached	Mandatory	Shared Service Center
PPA110	OPM		Permit retroactive personnel actions to be entered without manually reentering actions already on file.	Optional	Shared Service Center
PPA110.01	Functional		The solution shall enable user (PERSONNELIST) to complete retroactive personnel actions without manually reentering actions already on file.	Optional	Shared Service Center
PPA110.02	Functional		The solution shall enable user to complete retroactive personnel actions (historical correction of records) as a manual process option.	Optional	Shared Service Center
PPA110.03	Functional		Solution must maintain data records (such as pay and benefits for the previous 50 years) in order for user (PERSONNELIST) to complete retroactive HR and pay/benefits actions as an automated process.	Optional	Shared Service Center
PPA111	OPM		Permit retroactive personnel actions to be processed without manually reentering actions already on file.	Optional	Shared Service Center
PPA111.01	Functional		The solution shall enable user (PERSONNELIST) to complete retroactive personnel actions without manually reentering actions already on file.	Optional	Shared Service Center
PPA111.02	Functional		The solution shall enable user to complete retroactive personnel actions (historical correction of records) as a manual process option.	Optional	Shared Service Center
PPA111.03	Functional		Solution must maintain data records (such as pay and benefits for the previous 50 years) in order for user (PERSONNELIST) to complete retroactive HR and pay/benefits actions as an automated process.	Optional	Shared Service Center
PPA112	OPM		Assign a unique processing number to each personnel action for identification and tracking purposes.	Mandatory	Shared Service Center
PPA112.01	Functional		The solution shall support automated creation and assignment of unique processing numbers to each personnel action for identification and tracking purposes.	Mandatory	Shared Service Center
PPA112.02	Functional		The solution shall enable GSA to utilize its own numbering convention for assigning unique tracking numbers to personnel actions.	Mandatory	Shared Service Center
PPA112.03	Functional		The solution shall enable GSA to change the numbering convention for creating/assigning unique tracking numbers to personnel actions, as needed to support GSA objectives.	Mandatory	Shared Service Center
PPA112.04	Functional		The solution shall support a centralized system that supports all of GSA (e.g. FAS, PBS) within a single numbering system and numbering convention.	Mandatory	Shared Service Center
PPA112.05	Functional		The solution shall support reports that can show all Requests for Personnel Action (SF52) by regional Centers of Excellence (COE)	Optional	Shared Service Center
PPA112.06	Functional		The solution shall support reports that can show all Requests for Personnel Action (SF52) by the SUPERUSER who created the SF52	Optional	Shared Service Center
PPA112.07	Functional		The solution shall support reports that can show all Requests for Personnel Action (SF52) by the regional location of the EMPLOYEES described within the SF52s	Optional	Shared Service Center
PPA112.08	Functional		The solution shall be able to support application of different numbering conventions by different agencies/organizations being supported	Optional	Shared Service Center
PPA112.09	Functional		The solution shall be able to support reports that can show all Requests for Personnel Action (SF52) by Agency supported	Optional	Shared Service Center
PPA112.10	Functional		The solution shall enable users (PERSONNELIST) to be able to search for and find personnel actions by unique tracking number	Mandatory	Shared Service Center
PPA112.11	Functional		The solution shall be enable users (PERSONNELIST) to access personnel actions by unique tracking number	Mandatory	Shared Service Center
PPA113	OPM		Capture employee name in the specified format.	Mandatory	Shared Service Center
PPA113.01	Functional		The solution shall capture an EMPLOYEE name in the following format: Last Name, First Name, Middle Initial	Mandatory	Shared Service Center
PPA114	OPM		Display the approving official's name.	Mandatory	Shared Service Center
PPA114.01	Functional		The solution shall be able to display the APPROVING OFFICIAL's name (Last, First, Middle Initial) when a personnel action is displayed to users (EMPLOYEE, SUPERVISOR, PERSONNELIST, DIRECTOR, SUPERUSER)	Mandatory	Shared Service Center
PPA114.02	Functional		The solution shall be able to prepopulate the APPROVING OFFICIAL's name from a centralized organizational hierarchy (position management module) and centralized employee records (when appropriate)	Optional	Shared Service Center
PPA114.03	Functional		The solution shall support routing personnel actions to a group of potential APPROVAL AUTHORITIES, each of whom will have the ability to select an action to approve (i.e. the action will be available to any individual assigned to that role)	Optional	Shared Service Center
PPA115	OPM		Display the approving official's title.	Mandatory	Shared Service Center
PPA115.01	Functional		The solution shall be able to display the APPROVING OFFICIAL's title when a personnel action is displayed to users (EMPLOYEE, SUPERVISOR, PERSONNELIST, DIRECTOR, SUPERUSER)	Mandatory	Shared Service Center
PPA116	OPM		Maintain employee personnel action history.	Mandatory	Shared Service Center
PPA116.01	Functional		The solution shall maintain a history of all previous personnel actions associated with an EMPLOYEE	Mandatory	Shared Service Center
PPA116.02	Functional		Select users (EMPLOYEE, PERSONNELIST, SUPERUSERS) shall be able to query an EMPLOYEE's personnel action history (real-time)	Optional	Shared Service Center
PPA116.03	Functional		The solution must enable select users (EMPLOYEE, PERSONNELIST, SUPERUSERS) shall be able to access an EMPLOYEE's personnel action history (respecting role-based access)	Mandatory	Shared Service Center
PPA116.04	Functional		The solution shall provide data management of all personnel actions associated with an EMPLOYEE (including those migrated from a prior system)	Mandatory	Shared Service Center
PPA116.05	Functional		The solution shall provide access to all personnel actions associated with an EMPLOYEE (including those migrated from a prior system)	Mandatory	Shared Service Center
PPA116.06	Functional		The solution shall be able to flag data elements to be retained for different time durations, in accordance with guidance received from GSA	Mandatory	Shared Service Center
PPA116.07	Functional		Solution must ensure any data elements flagged for deletion from the system shall be disposed of IAW Federal guidelines to protect all personal data	Mandatory	Shared Service Center
PPA117	OPM		Capture all employee data necessary to document a personnel action.	Mandatory	Shared Service Center
PPA118	OPM		Capture position data.	Mandatory	Shared Service Center
PPA118.01	Functional		The solution shall use Position Identification Numbers that will uniquely identify each funded and unfunded position in the position management hierarchy	Mandatory	Shared Service Center
PPA118.02	Functional		The solution shall enable associating the following position data with each Position Identification Number: Position Name	Mandatory	Shared Service Center
PPA118.03	Functional		The solution shall enable associating the following position data with each Position Identification Number: Organization	Mandatory	Shared Service Center

PPA118.04	Functional		The solution shall enable associating the following position data with each Position Identification Number: Office Symbol	Mandatory	Shared Service Center
PPA118.05	Functional		The solution shall enable associating the following position data with each Position Identification Number: Position Title	Mandatory	Shared Service Center
PPA118.06	Functional		The solution shall enable associating the following position data with each Position Identification Number: Location	Mandatory	Shared Service Center
PPA118.07	Functional		The solution shall enable associating the following position data with each Position Identification Number: Position Description Number	Mandatory	Shared Service Center
PPA118.08	Functional		The solution shall enable associating the following position data with each Position Identification Number: Security Access	Mandatory	Shared Service Center
PPA118.09	Functional		The solution shall enable associating the following position data with each Position Identification Number: Personnel Office ID	Mandatory	Shared Service Center
PPA118.10	Functional		The solution shall enable associating the following position data with each Position Identification Number: Occupation Category	Mandatory	Shared Service Center
PPA118.11	Functional		The solution shall enable associating the following position data with each Position Identification Number: Bargaining Unit Status	Mandatory	Shared Service Center
PPA118.12	Functional		The solution shall enable associating the following position data with each Position Identification Number: Functional Class	Mandatory	Shared Service Center
PPA118.13	Functional		The solution shall enable associating the following position data with each Position Identification Number: Work Schedule (e.g. Full Time)	Mandatory	Shared Service Center
PPA118.14	Functional		The solution shall enable associating the following position data with each Position Identification Number: Entry Level Grade	Mandatory	Shared Service Center
PPA118.15	Functional		The solution shall enable associating the following position data with each Position Identification Number: Valid Grade	Mandatory	Shared Service Center
PPA118.16	Functional		The solution shall enable associating the following position data with each Position Identification Number: Target Grade	Mandatory	Shared Service Center
PPA118.17	Functional		The solution shall enable associating the following position data with each Position Identification Number: Pay Basis (e.g. Per Annum)	Mandatory	Shared Service Center
PPA118.18	Functional		The solution shall enable associating the following position data with each Position Identification Number: Supervisory Status	Mandatory	Shared Service Center
PPA118.19	Functional		The solution shall enable associating the following position data with each Position Identification Number: Competitive Level	Mandatory	Shared Service Center
PPA118.20	Functional		The solution shall enable associating the following position data with each Position Identification Number: Position Sensitivity	Mandatory	Shared Service Center
PPA118.21	Functional		The solution shall enable associating the following position data with each Position Identification Number: Fair Labor Standards Act (FLSA) Category	Mandatory	Shared Service Center
PPA118.22	Functional		The solution shall enable associating the following position data with each Position Identification Number: Position Occupied status	Mandatory	Shared Service Center
PPA118.23	Functional		The solution shall enable associating the following position data with each Position Identification Number: Agency code and sub-element	Mandatory	Shared Service Center
PPA118.24	Functional		The solution shall enable associating the following position data with each Position Identification Number: Position Control Number Indicator	Mandatory	Shared Service Center
PPA118.25	Functional		The solution shall enable select users (PERSONNELIST, SUPERUSERS) to access the organizational history of a position by generating a list of all changes to position definition associated with a Position Identification Number	Optional	Shared Service Center
PPA118.26	Functional		The solution shall enable select users (PERSONNELIST, SUPERUSERS) to access the EMPLOYEE history of a position by generating a list of all personnel actions associated with a Position Identification Number	Optional	Shared Service Center
PPA119	OPM		Allow multiple incumbency of positions (for example, employee is on extended sick leave for six months the assignment is still active but HR may detail an employee or process a temporary appointment).	Mandatory	Shared Service Center
PPA119.01	Functional		The solution shall provide user (PERSONNELIST) with an automated process to detail employees.	Mandatory	Shared Service Center
PPA119.02	Functional		The solution shall enable user (PERSONNELIST) to manage detail assignment process for eligible employees.	Mandatory	Shared Service Center
PPA119.03	Functional		The solution shall provide capability for the user (PERSONNELIST) to manage employees in detail status by aligning them to separate (temporary) position control numbers while keeping their permanent (current) position control number intact/reserved.	Mandatory	Shared Service Center
PPA119.04	Functional		The solution shall enable user (PERSONNELIST) to specify and renew (modify) detail periods upon expiration.	Mandatory	Shared Service Center
PPA119.05	Functional		The solution shall enable user (PERSONNELIST) to assign the appropriate supervisory chain for the detailed employee as part of the detail assignment process.	Mandatory	Shared Service Center
PPA119.06	Functional		The solution shall provide notification and get electronic agreement from both the permanent (EMPLOYEE MANAGER) and detailed (EMPLOYEE MANAGER) supervisory chain that identifies the appropriate employee supervisory chain.	Mandatory	Shared Service Center
PPA119.07	Functional		The solution shall provide capability for the user (PERSONNELIST) to continuously monitor/manage/access/confirm supervisory chain for detailed employees.	Mandatory	Shared Service Center
PPA119.08	Functional		The solution shall provide capability for the user (PERSONNELIST) to ensure/confirm "ownership" of supervisory responsibilities for detailed employees ensuring that the employee is supervised and performance appraisals are appropriately completed.	Mandatory	Shared Service Center
PPA119.09	Functional		The solution shall enable limited users (PERSONNELIST, SUPERUSERS) to assign dual-occupancy of a position (assign the same PCN to two EMPLOYEES) when the primary individual has been detailed to another position for an extended period of time	Mandatory	Shared Service Center
PPA119.10	Functional		The solution shall enable limited users (PERSONNELIST, SUPERUSERS) to assign dual-occupancy of a position (assign the same PCN to two EMPLOYEES) when the primary individual will be permanently vacating the position (e.g. retiring) in the near future and the organization desires seamless transition	Mandatory	Shared Service Center
PPA119.11	Functional		The solution shall enable limited users (PERSONNELIST, SUPERUSERS) to assign the same PCN to two positions as part of a career ladder	Mandatory	Shared Service Center
PPA120	OPM		Capture reason for separation using Nature of Action codes.	Mandatory	Shared Service Center
PPA120.01	Functional		The solution shall support capture of an EMPLOYEE's reason for separation using Nature of Action codes (Remarks Code: R) on the SF 50	Mandatory	Shared Service Center
PPA120.02	Functional		The solution shall support capture of an AGENCY's comments on an EMPLOYEE's reason for separation using Nature of Action codes (Remarks Code: S) on the SF 50	Mandatory	Shared Service Center
PPA120.03	Functional		The solution shall ensure that remarks associated with captured reasons for separation in employee records are viewable in reporting tool for HR users	Optional	Shared Service Center
PPA120.04	Functional		The solution shall ensure that captured reasons for separation in employee records are viewable in reporting tool for HR users (e.g. for employee engagement assessments)	Optional	Shared Service Center
PPA121	OPM		Identify employees who have been granted internal return rights (this relates to internal return rights - not external like IPAs and ICAOs).	Optional	Shared Service Center
PPA121.01	Functional		The solution shall provide a method to identify or flag employees who have been granted internal return rights (this relates to internal return rights - not external like IPAs and ICAOs).	Optional	Shared Service Center
PPA121.02	Functional		The solution shall provide limited users (SUPERUSERS, PERSONNELISTS) the ability to generate reports of employees who have been granted internal return rights	Optional	Shared Service Center
PPA121.03	Functional		The solution shall provide limited users (SUPERUSERS, PERSONNELISTS) the ability to generate historical usage reports of employees who have been granted internal return rights in prior time periods	Optional	Shared Service Center
PPA122	OPM		Capture priority consideration for employees.	Optional	Shared Service Center
PPA122.01	Functional		The solution shall provide a method to identify or tag EMPLOYEES eligible for priority consideration	Optional	Shared Service Center
PPA122.02	Functional		The solution shall provide a report of EMPLOYEEs tagged as eligible for priority consideration	Optional	Shared Service Center
PPA122.03	Functional		The solution shall enable capture of EMPLOYEE data for EMPLOYEE's eligible for priority consideration	Optional	Shared Service Center
PPA122.04	Functional		The solution shall enable display of an EMPLOYEE's eligibility for priority consideration in candidate selection process	Optional	Shared Service Center
PPA123	OPM		Route personnel actions based on workflow	Mandatory	Shared Service Center
PPA123.01	Functional		The solution shall route personnel actions based on defined workflow processes.	Mandatory	Shared Service Center
PPA123.02	Functional		The solution shall allow for future modification of personnel action workflows, in reflection of future policy or guidance changes	Optional	Shared Service Center
PPA123.03	Functional		The solution shall enable personnel action workflow processes to be tailorable for regions (e.g. incorporating specific regional individuals)	Optional	Shared Service Center
PPA124	OPM		Tailor the workflow routing to the action (e.g. NOA code user authority monetary thresholds agency-specific rules).	Mandatory	Shared Service Center

PPA124.01	Functional		The solution shall support tailoring workflow routing to the action (e.g. NOA code, user authority, monetary thresholds, agency-specific rules).	Mandatory	Shared Service Center
PPA124.02	Functional		The solution shall allow for future modification of personnel action workflows, in reflection of future policy or guidance changes	Optional	Shared Service Center
PPA124.03	Functional		The solution shall enable personnel action workflow processes to be tailorable for regions (e.g. incorporating specific regional individuals)	Optional	Shared Service Center
PPA125	OPM		Route personnel actions to appropriate alternate parties when workflow routing is affected by "out of office" situations.	Optional	Shared Service Center
PPA125.01	Functional		The solution shall enable assignment of alternate APPROVING OFFICIALS	Optional	Shared Service Center
PPA125.02	Functional		The solution shall enable assignment of personnel actions to a "group box" or group role for alternate approval processing (any individual assigned to that role would be able to act as an APPROVING OFFICIAL)	Optional	Shared Service Center
PPA126	OPM		Notify individuals based on the role of the individual.	Mandatory	Shared Service Center
PPA126.01	Functional		Notify individuals based on the role of the individual as referenced in the Business Reference Model for the following Activity IDs and Activities: 3.6.6 Bring Candidate On Board; 5.3.1 Identify Employees to Receive Pay or Leave Change; 2.1.12 Implement Appeal Decision; 2.1.6 Maintain Positions; 5.2.3 Set Bonus or Award Pay.	Mandatory	Shared Service Center
PPA127	OPM		Notify employee about initiated personnel action when applicable.	Mandatory	Shared Service Center
PPA127.01	Functional		Notify employee about initiated personnel action when applicable as referenced in the Business Reference Model for the following Activity IDs and Activities: 3.6.6 Bring Candidate On Board; 5.3.1 Identify Employees to Receive Pay or Leave Change; 2.1.12 Implement Appeal Decision; 2.1.6 Maintain Positions; 5.2.3 Set Bonus or Award Pay.	Mandatory	Shared Service Center
PPA128	OPM		Notify employee about completed personnel action.	Mandatory	Shared Service Center
PPA128.01	Functional		Notify employee about completed personnel action as referenced in the Business Reference Model for the following Activity IDs and Activities: 3.6.6 Bring Candidate On Board; 5.3.1 Identify Employees to Receive Pay or Leave Change; 2.1.12 Implement Appeal Decision; 2.1.6 Maintain Positions; 5.2.3 Set Bonus or Award Pay.	Mandatory	Shared Service Center
PPA129	OPM		Provide access to personnel action data to the employee affected by the personnel action within a specified time period of the personnel action.	Mandatory	Shared Service Center
PPA129.01	Functional		The solution shall allow HR to define a specified time period within which EMPLOYEEs shall be provided access to personnel action records impacting them	Mandatory	Shared Service Center
PPA129.02	Functional		The solution shall support generating reports of all EMPLOYEEs impacted by personnel actions within a specified time frame	Mandatory	Shared Service Center
PPA129.03	Functional		The solution shall support generating alerts / notifications to EMPLOYEEs when a personnel action concerning them has been identified as being within the system in a specified time period	Mandatory	Shared Service Center
PPA129.04	Functional		The solution shall provide impacted EMPLOYEEs access to personnel action data within a specified time period of the personnel action	Mandatory	Shared Service Center
PPA129.05	Functional		The solution shall provide EMPLOYEEs the ability to search for personnel actions they have in which they are the impacted party IAW role-based access	Mandatory	Shared Service Center
PPA129.06	Functional		The solution shall provide EMPLOYEEs the ability to generate reports of personnel actions where they are the impacted party IAW role-based access	Optional	Shared Service Center
PPA130	OPM		Track personnel actions through workflow stages (role based).	Mandatory	Shared Service Center
PPA130.01	Functional		The solution shall enable users (EMPLOYEE, PERSONNELISTS, SUPERVISOR, SUPERUSER) to track personnel actions through workflow stages IAW role-based access	Optional	Shared Service Center
PPA130.02	Functional		The solution shall enable configuration to display duration (time) a personnel action spends at each workflow stage	Optional	Shared Service Center
PPA130.03	Functional		The solution shall enable basic data analysis and trending of personnel actions throughout the workflow stages (e.g. time spent at each stage, number of actions at each stage, throughput)	Optional	Shared Service Center
PPA130.04	Functional		The solution shall enable users (EMPLOYEE, PERSONNELISTS, SUPERVISOR, SUPERUSER) to query current status/ workflow stage of a personnel action IAW role-based access	Optional	Shared Service Center
PPA130.05	Functional		The solution shall be capable of providing PERSONNELISTS with a dashboard to display user personnel actions by workflow stage. The dashboard shall provide the ability to drill down to specific users associated with each role.	Optional	Shared Service Center
PPA131	OPM		Track past personnel actions including effective dates (role based).	Mandatory	Shared Service Center
PPA131.01	Functional		The solution shall maintain data for all past personnel actions (including effective dates)	Mandatory	Shared Service Center
PPA131.02	Functional		The solution shall ensure access by authorized users (EMPLOYEE, SUPERVISOR, PERSONNELIST, SUPERUSERS) IAW role-based access to all past personnel actions (including effective dates)	Mandatory	Shared Service Center
PPA131.03	Functional		The solution shall enable authorized users (EMPLOYEE, SUPERVISOR, PERSONNELIST, SUPERUSER) IAW role-based access to generate reports for past personnel actions (including effective dates)	Mandatory	Shared Service Center
PPA132	OPM		Track current personnel actions including effective dates (role based).	Mandatory	Shared Service Center
PPA132.01	Functional		The solution shall maintain data for all current personnel actions (including effective dates)	Mandatory	Shared Service Center
PPA132.02	Functional		The solution shall ensure access by authorized users (EMPLOYEE, SUPERVISOR, PERSONNELIST, SUPERUSERS) IAW role-based access to all current personnel actions (including effective dates)	Mandatory	Shared Service Center
PPA132.03	Functional		The solution shall enable authorized users (EMPLOYEE, SUPERVISOR, PERSONNELIST, SUPERUSER) IAW role-based access to generate reports for current personnel actions (including effective dates)	Mandatory	Shared Service Center
PPA133	OPM		Track future dated personnel actions including effective dates (role based).	Mandatory	Shared Service Center
PPA133.01	Functional		The solution shall maintain data for all future-dated personnel actions (including effective dates)	Mandatory	Shared Service Center
PPA133.02	Functional		The solution shall ensure access by authorized users (EMPLOYEE, SUPERVISOR, PERSONNELIST, SUPERUSERS) IAW role-based access to all future-dated personnel actions (including effective dates)	Mandatory	Shared Service Center
PPA133.03	Functional		The solution shall enable authorized users (EMPLOYEE, SUPERVISOR, PERSONNELIST, SUPERUSER) IAW role-based access to generate reports for future-dated personnel actions (including effective dates)	Mandatory	Shared Service Center
PPA133.04	Functional		The solution shall update future-dated personnel actions once the effective date has been reached	Mandatory	Shared Service Center
PPA134	OPM		Track status of all personnel action requests (role based).	Mandatory	Shared Service Center
PPA134.01	Functional		The solution shall associate a status field with all personnel action requests, tied to workflow stage	Mandatory	Shared Service Center
PPA134.02	Functional		The solution shall enable GSA definition of possible "statuses" that can apply to personnel actions	Mandatory	Shared Service Center
PPA134.03	Functional		The solution shall provide flexibility to define distinct "statuses" on the basis of personnel action type	Mandatory	Shared Service Center
PPA134.04	Functional		The solution shall enable integration between possible defined statuses for a personnel action and the status field used in automated workflows of the personnel action	Optional	Shared Service Center
PPA134.05	Functional		The solution shall enable authorized users (EMPLOYEE, SUPERVISOR, PERSONNELIST, SUPERUSER) IAW role-based access to generate reports by status of personnel actions.	Mandatory	Shared Service Center
PPA134.06	Functional		The solution shall provide a dashboard capability to authorized users (PERSONNELIST, DIRECTOR, SUPERUSER) to display user personnel actions by status.	Optional	Shared Service Center
PPA135	OPM		Track all time-limited actions (define time-limited).	Mandatory	Shared Service Center
PPA135.01	Functional		The solution shall maintain data for all time-limited personnel actions (e.g. temporary promotions, NTE appointments).	Mandatory	Shared Service Center
PPA135.02	Functional		The solution shall provide select users (PERSONNELISTS, SUPERUSERS) ability to generate reports on time-limited actions to which they have role-based access	Mandatory	Shared Service Center
PPA135.03	Functional		The solution shall provide select users (PERSONNELISTS, SUPERUSERS) ability to generate reports on historical use / processing of time-limited actions	Optional	Shared Service Center
PPA136	OPM		Track temporary employees nearing certain hours thresholds.	Mandatory	Shared Service Center
PPA136.01	Functional		The solution shall provide ability for HR to track the number of hours accrued by temporary employees.	Mandatory	Shared Service Center

PPA136.02	Functional		The solution shall provide ability for HR to track the number of hours accrued by intermittent employees.	Mandatory	Shared Service Center
PPA136.03	Functional		The solution shall provide select users (PERSONNELISTS, SUPERUSERS) ability to generate reports on temporary employees, hours accrued, and hours thresholds	Mandatory	Shared Service Center
PPA136.04	Functional		The solution shall provide select users (PERSONNELISTS, SUPERUSERS) ability to generate reports on intermittent employees, hours accrued, and hours thresholds	Mandatory	Shared Service Center
PPA136.05	Functional		The solution shall provide HR (SUPERUSERS) ability to generate basic data analytics on temporary / intermittent employees approaching hours thresholds	Optional	Shared Service Center
PPA136.06	Functional		The solution shall provide limited users (SUPERUSERS) ability to generate reports on employees approaching hours thresholds during prior periods (historic data)	Optional	Shared Service Center
PPA137	OPM		Notify individuals of temporary employees nearing certain hours thresholds.	Mandatory	Shared Service Center
PPA137.01	Functional		Notify individuals of temporary employees nearing certain hours thresholds as referenced in the Business Reference Model for the following Activity IDs and Activities: 3.6.6 Bring Candidate On Board; 5.3.1 Identify Employees to Receive Pay or Leave Change; 2.1.12 Implement Appeal Decision; 2.1.6 Maintain Positions; 5.2.3 Set Bonus or Award Pay.	Mandatory	Shared Service Center
PPA138	OPM		Automatically produce notification for a time-sensitive action triggered by elapsed time (e.g. completion of probationary period, completion of temporary appointment within-grade salary increase).	Mandatory	Shared Service Center
PPA138.01	Functional		The solution shall automatically produce notifications of status change to impacted parties (EMPLOYEE, SUPERVISOR, PERSONNELISTS) for a time-sensitive action triggered by elapsed time (e.g. completion of probationary period completion of temporary appointment within-grade salary increase).	Mandatory	Shared Service Center
PPA138.02	Functional		The solution shall automatically produce notifications for next workflow step to impacted parties (EMPLOYEE, SUPERVISOR, PERSONNELIST) for a time-sensitive action triggered by elapsed time (e.g. completion of probationary period completion of temporary appointment within-grade salary increase).	Optional	Shared Service Center
PPA138.03	Functional		The solution shall provide automated notifications triggered by elapsed time that clearly distinguish between "ACTION REQUIRED" and "INFORMATIONAL"	Optional	Shared Service Center
PPA138.04	Functional		The solution shall enable providing notifications to SUPERVISORS when deadlines are approaching or missed on time-sensitive personnel actions. This function shall be configurable to provide best impact for GSA (i.e. avoid inundating stakeholders with excessive notifications or notices at the wrong process step)	Mandatory	Shared Service Center
PPA139	OPM		Notify other organization units of new hire start date.	Mandatory	Shared Service Center
PPA139.01	Functional		Notify other organization units that are impacted by an employee new hire start date as referenced in the Business Reference Model for the following Activity IDs and Activities: 3.6.6 Bring Candidate On Board; 5.3.1 Identify Employees to Receive Pay or Leave Change; 2.1.12 Implement Appeal Decision; 2.1.6 Maintain Positions; 5.2.3 Set Bonus or Award Pay.	Mandatory	Shared Service Center
PPA140	OPM		Vary notification by position for other organization units of new hire start date.	Mandatory	Shared Service Center
PPA140.01	Functional		Vary notification by position for other organization units impacted by an employee new hire start date as referenced in the Business Reference Model for the □ following Activity IDs and Activities: 3.6.6 Bring Candidate On Board; 5.3.1 Identify Employees to Receive Pay or Leave Change; 2.1.12 Implement Appeal Decision; □ 2.1.6 Maintain Positions; 5.2.3 Set Bonus or Award Pay.	Mandatory	Shared Service Center
PPA141	OPM		Vary notification by role for other organization units of new hire start date.	Mandatory	Shared Service Center
PPA141.01	Functional		Vary notification by role for other organization units of new hire start date as referenced in the Business Reference Model for the following Activity IDs and □ Activities: 3.6.6 Bring Candidate On Board; 5.3.1 Identify Employees to Receive Pay or Leave Change; 2.1.12 Implement Appeal Decision; 2.1.6 Maintain Positions; □ 5.2.3 Set Bonus or Award Pay.	Mandatory	Shared Service Center
PPA142	OPM		Vary notification by agency-specific requirements.	Mandatory	Shared Service Center
PPA142.01	Functional		Vary notification by agency-specific requirements for an employee new hire start date as referenced in the Business Reference Model for the following Activity □ IDs and Activities: 3.6.6 Bring Candidate On Board; 5.3.1 Identify Employees to Receive Pay or Leave Change; 2.1.12 Implement Appeal Decision; 2.1.6 Maintain □ Positions; 5.2.3 Set Bonus or Award Pay.	Mandatory	Shared Service Center
PPA143	OPM		Notify individuals of employees who have been granted return rights (role based).	Mandatory	Shared Service Center
PPA143.01	Functional		The solution shall enable user (PERSONNELIST) to provide automated messages to employees who have been granted return rights.	Optional	Shared Service Center
PPA143.02	Functional		The solution shall enable user (PERSONNELIST) to execute automated onboarding processes for returning employees.	Optional	Shared Service Center
PPA144	OPM		Provide for online approval of personnel actions.	Mandatory	Shared Service Center
PPA144.01	Functional		The solution shall enable approving officials (SUPERVISORS, PERSONNELISTS) to approve personnel actions online (web-enabled)	Mandatory	Shared Service Center
PPA144.02	Functional		The solution shall ensure user authentication of approving officials (SUPERVISORS, PERSONNELISTS) remotely approving personnel actions	Mandatory	Shared Service Center
PPA144.03	Functional		The solution shall support digital signature of approving officials (SUPERVISORS, PERSONNELISTS) in approving personnel actions online (web-enabled)	Optional	Shared Service Center
PPA144.04	Functional		The solution shall provide approving officials (SUPERVISORS, PERSONNELISTS, DIRECTORS, SUPERUSERS) with list of "Personnel Actions awaiting action" for that particular approving official via online access	Optional	Shared Service Center
PPA144.05	Functional		The solution shall support online approval by an alternate Approving Official, as designated in the system	Optional	Shared Service Center
PPA145	OPM		Provide for online disapproval of personnel actions.	Mandatory	Shared Service Center
PPA145.01	Functional		The solution shall enable approving officials (SUPERVISORS, PERSONNELISTS) to disapprove personnel actions online (web-enabled)	Mandatory	Shared Service Center
PPA145.02	Functional		The solution shall ensure user authentication of approving officials (SUPERVISORS, PERSONNELISTS) remotely disapproving personnel actions	Mandatory	Shared Service Center
PPA145.03	Functional		The solution shall support digital signature of approving officials (SUPERVISORS, PERSONNELISTS) in disapproving personnel actions online (web-enabled)	Optional	Shared Service Center
PPA145.04	Functional		The solution shall provide approving officials (SUPERVISORS, PERSONNELISTS, DIRECTORS, SUPERUSERS) with list of "Personnel Actions awaiting action" via online access	Optional	Shared Service Center
PPA145.05	Functional		The solution shall support online approval/disapproval by an alternate Approving Official, as designated in the system	Mandatory	Shared Service Center
PPA146	OPM		Allow personnel action activity analysis for all NOAs (reporting).	Mandatory	Shared Service Center
PPA146.01	Functional		The solution shall support personnel action activity analysis for reporting for all NOAs	Mandatory	Shared Service Center
PPA146.02	Functional		The solution shall be capable of providing an interface to a specified business intelligence (BI) system to support personnel action activity analysis for reporting for all NOAs	Mandatory	Shared Service Center
PPA147	OPM		Allow personnel action activity analysis for each NOA (reporting).	Mandatory	Shared Service Center
PPA147.01	Functional		The solution shall support personnel action activity analysis for reporting on each NOA	Mandatory	Shared Service Center
PPA147.02	Functional		The solution shall be capable of providing an interface to a specified business intelligence (BI) system to support personnel action activity analysis for reporting on each NOA	Mandatory	Shared Service Center
PPA148	OPM		Allow personnel action activity reporting for all NOAs (reporting).	Mandatory	Shared Service Center
PPA148.01	Functional		The solution shall support personnel action activity reporting for all NOAs	Mandatory	Shared Service Center
PPA148.02	Functional		The solution shall be capable of providing an interface to a specified business intelligence (BI) system to support personnel action activity reporting for all NOAs	Mandatory	Shared Service Center
PPA149	OPM		Allow personnel action activity reporting for each NOA (reporting).	Mandatory	Shared Service Center
PPA149.01	Functional		The solution shall support personnel action activity reporting for each NOA	Mandatory	Shared Service Center
PPA149.02	Functional		The solution shall be capable of providing an interface to a specified business intelligence (BI) system to support personnel action activity reporting for each NOA	Mandatory	Shared Service Center
PPA150	OPM		Produce compliance report (reporting).	Mandatory	Shared Service Center

PPA150.01	Functional		The solution shall support producing compliance reports supporting various system modules	Mandatory	Shared Service Center
PPA150.02	Functional		The solution shall be capable of integrating with external business intelligence tool for producing compliance reports	Mandatory	Shared Service Center
PPA150.03	Functional		The solution shall be able to support alterations to standardized reports	Mandatory	Shared Service Center
PPA150.04	Functional		The solution shall have the agility to support adding / deleting compliance reports for various components	Mandatory	Shared Service Center
PPA150.05	Functional		The solution shall support automated workflows to generate compliance reports IAW recurring timeframes	Mandatory	Shared Service Center
PPA150.06	Functional		The solution shall maintain the agility to adapt to future changes in legal requirements and business rules as to what shall be deleted and when	Mandatory	Shared Service Center
PPA152.01	Functional		The solution shall enable automated deletion of specific history records (determined via business rules), based on legal requirements	Optional	Shared Service Center
PPA152.02	Functional		The solution shall support "assisted automated" deletion of specific history records (determined via business rules), based on legal requirements. "Assisted automated" is defined as records that are automatically identified and queued for deletion but require final approval from an authorized user (SUPERUSER)	Optional	Shared Service Center
PPA153.01	Functional		The solution shall enable automated deletion of specific history records (determined via business rules), based on settlement requirements	Optional	Shared Service Center
PPA153.02	Functional		The solution shall support "assisted automated" deletion of specific history records (determined via business rules), based on settlement requirements. "Assisted automated" is defined as records that are automatically identified and queued for deletion but require final approval from an authorized user (SUPERUSER)	Optional	Shared Service Center
PPA153.03	Functional		The solution shall maintain the agility to adapt to future changes in legal requirements for settlement agreements and business rules as to what shall be deleted and when	Mandatory	Shared Service Center
PPA154	OPM		Associate aggregate employee demographic data for each NOA (reporting).	Mandatory	Shared Service Center
PPA154.01	Functional		The solution shall support aggregate demographics reports relating to various system modules	Mandatory	Shared Service Center
PPA154.02	Functional		The solution shall be able to support future alterations to standardized aggregate demographics reports	Mandatory	Shared Service Center
PPA155	OPM		Generate employee hire checklist.	Optional	Shared Service Center
PPA155.01	Functional		The solution shall support OPM hire processes for new hires	Optional	Shared Service Center
PPA155.02	Functional		The solution shall support GSA-specific alterations to the process for new hires	Optional	Shared Service Center
PPA155.03	Functional		The solution will implement an automated workflow process for the "employee hire checklist"	Optional	Shared Service Center
PPA155.04	Functional		The solution will integrate automatic notifications / alerts for impacted parties as part of the new employee checklist automation	Optional	Shared Service Center
PPA155.05	Functional		The solution shall permit HR (SUPERUSER) to modify the "employee hire checklist" and associated automatic workflow	Mandatory	Shared Service Center
PPA155.06	Functional		The solution shall ensure integration between the automated workflow associated with the "employee hire checklist" and recruiting / staffing processes	Mandatory	Shared Service Center
PPA156	OPM		Trigger hire event tracking (pre-employment) (e.g. medical security clearance).	Optional	Shared Service Center
PPA156.01	Functional		The solution shall initiate pre-employment event tracking (for items such as medical security clearance) IAW the employee hire checklist workflow	Optional	Shared Service Center
PPA156.02	Functional		The solution shall support pre-employment event tracking (for items such as medical security clearance) IAW the employee hire checklist workflow	Optional	Shared Service Center
PPA158	OPM		Request office space for new hire.	Optional	Shared Service Center
PPA158.01	Functional		The solution shall enable user (PERSONNELIST) to execute automated onboarding processes for returning employees.	Optional	Shared Service Center
PPA158.02	Functional		The solution shall enable user (PERSONNELIST) an automated capability (or interface to an automated system) to assign office space to new employees.	Optional	Shared Service Center
PPA158.03	Functional		Solution must provide all facilities and desk locations (options) and allow user (onboarding specialist) to assign all employees to office spaces. (Exceptions include hoteling locations.)	Optional	Shared Service Center
PPA158.04	Functional		The solution shall provide user (PERSONNELIST) with the ability to view office space occupied or vacant.	Optional	Shared Service Center
PPA158.05	Functional		Solution must provide all facilities and desk locations (options) and allow user (onboarding specialist) to assign all employees to office spaces. (Exceptions include hoteling locations.)	Optional	Shared Service Center
PPA159	OPM		Request system logon ID(s) for new hire.	Optional	Shared Service Center
PPA159.01	Functional		The solution shall interface with Service Now to automate process for user (employee/applicant) to get a logon ID and password as part of the structured onboarding process.	Optional	Shared Service Center
PPA160	OPM		Request company property for new hire.	Optional	Shared Service Center
PPA160.01	Functional		The solution shall interface with Service Now to automate process for user (employee/applicant) to be issued GSA property (laptop computers, cell phones, tablets etc.) as part of the structured onboarding process.	Optional	Shared Service Center
PPA161	OPM		Trigger enrollment in orientation N days after hire date.	Optional	Shared Service Center
PPA161.01	Functional		Trigger enrollment in mandatory training N weeks after hire date as required in the Business Reference Model process 3.6.6, Bringing an Employee Onboard. Employees would be enrolled in mandatory new hire training in a specified number of weeks after their hire date.	Optional	Shared Service Center
PPA162	OPM		Trigger enrollment in mandatory training N weeks after hire date.	Mandatory	Shared Service Center
PPA162.01	Functional		The solution shall identify new hires for mandatory training N weeks after hire date	Mandatory	Shared Service Center
PPA162.02	Functional		The solution shall trigger enrollment of new EMPLOYEES in mandatory training N weeks after hire date	Mandatory	Shared Service Center
PPA162.03	Functional		The solution shall support definition of mandatory training at the enterprise level	Mandatory	Shared Service Center
PPA162.04	Functional		The solution shall support definition of mandatory training at the regional level	Mandatory	Shared Service Center
PPA162.05	Functional		The solution shall support definition of mandatory training at the functional level	Mandatory	Shared Service Center
PPA162.06	Functional		The solution shall support reporting to specific users (PERSONNELISTS, SUPERVISORS) on status of mandatory training completion for new hires	Mandatory	Shared Service Center
PPA162.07	Functional		The solution shall provide an agency with the option to disable/discontinue automatic triggering of enrollment	Mandatory	Shared Service Center
PPA162.08	Functional		The solution shall provide a dashboard capability to authorized users (PERSONNELIST, DIRECTOR, SUPERUSER) to display status and statistics of mandatory training completion for new hires	Optional	Shared Service Center
PPA163	OPM		Trigger the closing of the requisition when the hire personnel action is completed.	Mandatory	Shared Service Center
PPA163.01	Functional		The solution shall support automatic initiation ("triggering") of requisition closure when a hire personnel action is completed	Mandatory	Shared Service Center
PPA163.02	Functional		The solution shall support automated workflow processes for closing a requisition when a hire action is completed	Optional	Shared Service Center
PPA163.03	Functional		The solution shall provide alerts/notifications to parties that must take action when closing a requisition	Optional	Shared Service Center
PPA163.04	Functional		The solution shall provide specific users (PERSONNELISTS, SUPERUSERS) reporting on status and numbers of requisition closures	Mandatory	Shared Service Center
PPA164	OPM		Produce employee checklist as required.	Optional	Shared Service Center
PPA164.01	Functional		Produce a new employee checklist as required in the Business Reference Model process 3.6.6, Bringing an Employee Onboard. The Checklist would include Pre-Employment processes and requirements to ensure an employee is in compliance (new hire forms for completion, security clearance, space request, badge request, equipment, special needs, etc.).	Optional	Shared Service Center
PPA165	OPM		Notify appropriate personnel - including HR staff management EEO IT security - of tasks to be performed.	Optional	Shared Service Center
PPA165.01	Functional		The solution shall support initiation of an automated workflow to support integration of a new employee checklist	Optional	Shared Service Center

PPA166	OPM		Capture aggregate employee demographic data.	Mandatory	Shared Service Center
PPA166.01	Functional		The solution shall be capable of aggregating employee demographic data	Mandatory	Shared Service Center
PPA166.02	Functional		The solution shall have the agility to enable users (PERSONNELISTS, SUPERUSER) to alter the level of aggregation for employee demographic data (e.g. region, office, function)	Mandatory	Shared Service Center
PPA166.03	Functional		The solution shall be capable of visually displaying aggregated demographic data	Optional	Shared Service Center
PPA166.04	Functional		The solution shall be able to generate reports on aggregate employee demographic data	Mandatory	Shared Service Center
PPA166.05	Functional		The solution shall maintain role-based access to granular employee demographic data	Mandatory	Shared Service Center
PPA167	OPM		Archive personnel action.	Mandatory	Shared Service Center
PPA167.01	Non-functional	Technical Specification	The solution needs to be able to produce reports from historical archive (data warehouse) plus live, active data inside the HR system	Mandatory	Shared Service Center
PPA169	OPM		Retain historical data.	Mandatory	Shared Service Center
PPA170	OPM		Allow retrieval of historical data (role based).	Mandatory	Shared Service Center
PPA170.01	Functional		The solution shall support retrieval of historical personnel action data IAW role-based access	Mandatory	Shared Service Center
PPA170.02	Functional		The solution shall be capable of generating reports from the historical archive (data warehouse)	Mandatory	Shared Service Center
PPA170.03	Functional		The solution shall be capable of generating reports from current personnel action data	Mandatory	Shared Service Center
PPA170.04	Functional		The solution shall be capable of generating reports that combine data from the historical archive (data warehouse) and current personnel action data	Mandatory	Shared Service Center
PPA172	OPM		Issue notices to retiring employees IAW the Job Aid (Notice Requirements When an Employee Retires) in Chapter 30 of the Guide to Processing Personnel Actions.	Optional	Shared Service Center
PPA173	OPM		Provide an Entrance on Duty service consistent with the description and requirements found in the Entrance on Duty Concept of Operations	Optional	Shared Service Center
PPA173.01	Functional		The solution shall make use of automation (such as auto-population of common data) during EOD processing to minimize duplicative entry.	Optional	Shared Service Center
PPA173.02	Functional		The solution shall enable automated workflow processes to support EOD requirements	Optional	Shared Service Center
PPA173.03	Functional		The solution shall provide configurable role-based access to align with and support the EOD service delivery model	Optional	Shared Service Center
PPA175	OPM		Provide EHRI error reports to agencies within 30 days after receipt from EHRI.	Mandatory	Shared Service Center/Agency
PPA175.01	Functional		The SSC shall provide user (PERSONNELIST, HR ADMINISTRATOR) with an automated dashboard to track status of EHRI activity/errors.	Mandatory	Shared Service Center
PPA175.02	Functional		The SSC shall provide user (PERSONNELIST, HR ADMINISTRATOR) continuous access to EHRI reports.	Mandatory	Shared Service Center
PPA46.02	Functional		The solution shall enable user (PERSONNELIST) to manually override automated routing to provide manual routing when there are system reporting chain errors or other anomalies.	Optional	Shared Service Center
					TOTAL

Requirement Number	Requirement Type	Non-Functional Type	Description	Mandatory / Optional	Who	In The Box	Extension	Customization
SS001	Functional		The solution shall allow for synchronizing of position hierarchy information and Manager views. Manager views shall show all the direct reportees based on the position hierarchy, including contract employees	Optional	Shared Service Center			
SS002	Functional		The solution shall provide manager with the ability to view subordinate employee information (for employees assigned to them)	Mandatory	Shared Service Center			
SS002.01	Functional		The solution shall provide users (MANAGERS) with the ability to view subordinate personal data such as education, veterans status, service computation date.	Mandatory	Shared Service Center			
SS002.02	Functional		The solution shall provide users (MANAGERS) with the ability to view subordinate assignment information (position data, probation periods, career conversion and retained grade data).	Mandatory	Shared Service Center			
SS002.03	Functional		The solution shall provide users (MANAGERS) with the ability to view subordinate pay and benefits information (salary and retirement).	Mandatory	Shared Service Center			
SS002.04	Functional		The solution shall provide users (MANAGERS) with the ability to view subordinate leave information (leave category and balances).	Mandatory	Shared Service Center			
SS002.06	Functional		The solution shall provide users (MANAGERS) with the ability to view subordinate performance ratings and performance status (in process, etc.). Access to performance ratings must be limited to those submitted by the supervisor and designated OPM limits (that are currently being changed). Since limits are subject to change, assigned limits need to be modifiable.	Mandatory	Shared Service Center			
SS002.07	Functional		The solution shall provide users (MANAGERS) with the ability to view subordinate awards history.	Mandatory	Shared Service Center			
SS002.08	Functional		The solution shall provide users (MANAGERS) with the ability to view personnel action history and individual Notifications of Personnel Actions (SF-50s)	Mandatory	Shared Service Center			
SS002.09	Non-functional	Security	The solution shall screen to provide only non-PII employee information to users (MANAGER)	Mandatory	Shared Service Center			
SS002.10	Functional		The solution shall provide the same information to any user (MANAGER, DIVISION CHIEF, DIRECTOR) that is in the supervisory chain of the employee.	Optional	Shared Service Center			
SS002.11	Functional		The solution shall assign pre-determined user roles (EMPLOYEE, MANAGER, PERSONNELIST) to limit access to data.	Mandatory	Shared Service Center			
SS003	Functional		The solution shall provide the manager with the ability to view filled positions (existing employees) and vacant positions (funded/unfunded) that reportdirectly to a supervisor under the manager's hierarchy.	Optional	Shared Service Center			
SS003.01	Non-functional	Integration	The solution shall interface with the Staff Acquisition system to derive vacancy announcement status.	Optional	Shared Service Center			
SS003.02	Functional		The solution shall include the ability for users (PERSONNELIST, SUPERVISORS, MANAGERS, DIRECTORS) to review the vacancy announcement status as part of the position review requirements.	Optional	Shared Service Center			
SS003.03	Non-functional	Technical Specification	The solution shall derive information from a centralized database so that data re-entry requirements are eliminated.	Optional	Shared Service Center			
SS004	Functional		The solution shall provide the manager the capability to perform search functionality.(e.g. Employee Name, Position, Person Type, Employee ID Number) - NON-PII ONLY	Mandatory	Shared Service Center			
SS005	Functional		The solution shall provide the capability for manager/supervisor to view employee workforce information (singular record or multiple records at a time).	Mandatory	Shared Service Center			
SS006	Functional		The solution shall restrict manager access to view subordinate employee sensitive information in accordance with GSA policies. Managers are required to have access to funded/funded vacancies within their organization.(e.g. RNO)	Mandatory	Shared Service Center			
SS007	Functional		The solution shall provide manager self service functionality based on supervisor status code assigned for the position definition.(e.g. Codes 2, 4, 5)	Mandatory	Shared Service Center			
SS008	Functional		The solution shall enable self-service capability for users (EMPLOYEES, PERSONNELISTS, PAYROLL SPECIALISTS) to perform retirement annuity calculations using employee personnel data.	Optional	Shared Service Center			
SS009	Non-functional	Integration	The solution shall have an executable function that will enable the user to capture and transmit employee Individual Retirement Record (IRR) data through an interface to OPM.	Optional	Shared Service Center			
SS010	Functional		The solution shall have the ability for employees to print or save as PDF either their individual Notifications of Personnel Actions (SF-50), award history, performance history, benefits record, position assignment record or personal data record.	Mandatory	Shared Service Center			
SS010.01	Functional		The solution shall provide users (EMPLOYEES) with the ability to view, print, save individual Notifications of Personnel Actions (SF-50 actions)	Mandatory	Shared Service Center			
SS010.02	Functional		The solution shall provide users (EMPLOYEES) with the ability to view, print, save award history.	Mandatory	Shared Service Center			
SS010.03	Functional		The solution shall provide users (EMPLOYEES) with the ability to view, print, and save benefits records.	Mandatory	Shared Service Center			
SS010.04	Functional		The solution shall provide users (EMPLOYEES) with the ability to view, print, save position assignment records.	Mandatory	Shared Service Center			
SS010.05	Functional		The solution shall provide users (EMPLOYEES) with the ability to view, print, save personal data records.	Mandatory	Shared Service Center			
SS011	Functional		The solution shall provide all employees with view access to their personal information.	Mandatory	Shared Service Center			
SS011.01	Functional		The solution shall provide GSA employees with view access to all personal information contained within the HR system.	Mandatory	Shared Service Center			
SS011.02	Functional		The solution shall provide users (EMPLOYEES) with view access to their personal information; Assignment History.	Mandatory	Shared Service Center			
SS011.03	Functional		The solution shall provide users (EMPLOYEES) with view access to their personal information; Position Information.	Mandatory	Shared Service Center			
SS011.04	Functional		The solution shall provide users (EMPLOYEES) with view access to their personal information; Obligation Dates.	Mandatory	Shared Service Center			
SS011.05	Functional		The solution shall provide users (EMPLOYEES) with view access to their personal information; Salary. (Requires interface with payroll)	Mandatory	Shared Service Center			
SS011.06	Functional		The solution shall provide users (EMPLOYEES) with view access to their personal information; Awards and Bonuses.	Mandatory	Shared Service Center			
SS011.07	Functional		The solution shall provide users (EMPLOYEES) with view access to their personal information; Performance Information. (Requires interface with Performance Management System)	Mandatory	Shared Service Center			
SS011.08	Functional		The solution shall provide users (EMPLOYEES) with view access to their personal information; Personnel Actions.	Mandatory	Shared Service Center			
SS011.09	Functional		The solution shall provide users (EMPLOYEES) with view access to their personal information; Clearance Information and status. (Requires interface with GCIMS.)	Mandatory	Shared Service Center			
SS011.10	Functional		The solution shall provide users (EMPLOYEES) with view access to their personal information; Training Information. (Requires interface with OLU)	Mandatory	Shared Service Center			
SS011.11	Functional		The solution shall provide users (EMPLOYEES) with view access to their personal information; Leave Information.	Mandatory	Shared Service Center			
SS012	Functional		The solution shall provide all employees the capability to be able to change their current system profile information.(e.g. Workflow Notification Type)	Mandatory	Shared Service Center			
SS013	Functional		The solution shall have the ability to provide real-time self-service capabilities to the employee and supervisor/manager.	Mandatory	Shared Service Center			
SS014	Functional		The solution shall provide users (EMPLOYEES, MANAGER EMPLOYEES, DIRECTOR EMPLOYEES) with integrated self-service and management capabilities.	Optional	Shared Service Center			
					TOTAL			

Requirement Number	Requirement Type	Non-Functional Type	Description	Mandatory / Optional	Who	In The Box	Extension	Customization
GSEP001	Functional		The solution shall provide automated employment verification and separation information to users (EMPLOYEE) as a self-service component of the HR IT System (through self-service request buttons).	Optional	Shared Service Center			
~~GSEP002~~	~~Non-functional~~	~~Integration~~	~~Solution is for users HELP DESK REPRESENTATIVES) to be able to get employee employment verification information through TALX system (or within HR IT System [decision pending])~~	~~Optional~~	~~Shared Service Center~~			
GSEP003	Non-functional	Integration	Solution must transmit separation records to eOPF as required.	Optional	Shared Service Center			
GSEP004	Non-functional	Integration	System must retain separation records that are not required in the eOPF for two years (per OPM guidance).	Optional	Shared Service Center			
SEP001	OPM		Provide documentation of separation actions to OPM IAW 5 USC 2951.	Mandatory	Shared Service Center/Agency			
SEP002	OPM		Accept an employee's resignation IAW 5 CFR 715.202.	Optional	Shared Service Center/Agency			
SEP002.01	Functional		Solution must fulfill all 5 CFR 715.202 requirements.	Optional	Shared Service Center			
SEP002.02	Functional		Solution must enable user (individual employee) to initiate the resignation process.	Optional	Shared Service Center			
SEP002.03	Functional		The solution shall notify employee's supervisor/manager before resignation process is initiated in HR.	Optional	Shared Service Center			
SEP002.04	Functional		The solution shall notify HR of employee generated request to resign.	Optional	Shared Service Center			
SEP002.05	Functional		Solution must assemble required retirement activities (form and instructions) in the HR system that can be reviewed and modified by the user (PERSONNELIST) before being sent to resigning employee. System must provide notifications to supporting offices for out processing to ensure the supporting offices can support the offboarding process for the resigning employee. System must provide workflow capability that sequences required resignation/separation activities in a logical pre-set (modifiable) order. System must provide workflow capability to initiate and manage the transactions from employee to notify supervisor and then process through HR.	Optional	Shared Service Center			
SEP002.06	Functional		The solution must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions).	Optional	Shared Service Center			
SEP002.07	Functional		Solution must provide user (PERSONNELIST) with the ability to contact resigning/separating employee at non-GSA email address and home address.	Optional	Shared Service Center			
SEP002.08	Functional		Solution must enable user (PERSONNELIST) to be able to identify, review, and manage resigning employees benefits through a selectable menu and be able to make changes where appropriate.	Optional	Shared Service Center			
SEP002.09	Functional		Solution must automatically generate and distribute letters and emails that explain all the benefits/entitlements to the resigning/separating employee.	Optional	Shared Service Center			
SEP003	OPM		Accept an employee's application for retirement IAW 5 USC Chapters 83 and 84.	Optional	Shared Service Center/Agency			
SEP003.01	Functional		Accept an employee's application for retirement IAW 5 USC Chapters 83 and 84 and 5 USC chapters 83 and 84; 5 USC 8336, 8347, 8412, 8453, and 8466; 5 CFR parts 831, 841-844, 850; 5 CFR 831.104, 831.501 831.1203 and 1204, 5 CFR 844.103, 844.201-204.	Optional	Shared Service Center			
SEP003.02	Functional		Solution must enable user (individual employee) to initiate the retirement process.	Optional	Shared Service Center			
SEP003.03	Functional		The solution shall notify employee's supervisor/manager before retirement process is initiated in HR.	Optional	Shared Service Center			
SEP003.04	Functional		The solution shall notify HR of employee generated request to retire.	Optional	Shared Service Center			
SEP003.05	Functional		Solution must assemble required retirement activities (form and instructions) in the HR system that can be reviewed and modified by the user (PERSONNELIST) before being sent to resigning employee. System must provide notifications to supporting offices for out processing to ensure the supporting offices can support the offboarding process for the resigning employee. System must provide workflow capability that sequences required retirement/resignation/separation activities in a logical pre-set (modifiable) order. System must provide workflow capability to initiate and manage the transactions from employee to notify supervisor and then process through HR.	Optional	Shared Service Center			
SEP003.06	Functional		The solution must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions).	Optional	Shared Service Center			
SEP003.07	Functional		Solution must provide user (PERSONNELIST) with the ability to contact resigning/separating employee at non-GSA email address and home address.	Optional	Shared Service Center			
SEP003.08	Functional		Solution must enable user (PERSONNELIST) to be able to identify, review, and manage resigning employees benefits through a selectable menu and be able to make changes where appropriate.	Optional	Shared Service Center			
SEP003.09	Functional		Solution must automatically generate and distribute letters and emails that explain all the benefits/entitlements to the resigning/separating employee.	Optional	Shared Service Center			
SEP004	OPM		Support the Agency in an employee's termination during a probationary/trial period IAW 5 CFR 315.804 and 315.805.	Mandatory	Shared Service Center/Agency			
SEP004.01	Functional		Solution must enable user (Supervisor) to initiate the termination process. Requirement is for HR to be notified of supervisor/manager generated request to terminate employee. Need workflow capability to initiate and manage the transactions from supervisor and then process through HR and provide appropriate notifications back to employee. Requirement is for dashboard to show status of actions.	Mandatory	Shared Service Center			
SEP004.02	Functional		Solution must assemble required employee termination requirements (forms and instructions) in the HR system that can be reviewed and modified by the user (PERSONNELIST) before being sent to employee. System must provide notifications to supporting offices for out processing to ensure the supporting offices can support the offboarding process for the terminated employee. System must provide workflow capability that sequences required separation activities in a logical pre-set (modifiable) order. System must provide workflow capability to initiate and manage the transactions from employee to notify supervisor and then process through HR.	Mandatory	Shared Service Center			
SEP004.03	Functional		The solution must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions).	Optional	Shared Service Center			
SEP004.04	Functional		Solution must provide user (PERSONNELIST) with the ability to contact separating employee at non-GSA email address and home address.	Mandatory	Shared Service Center			
SEP004.05	Functional		Solution must enable user (PERSONNELIST) to be able to identify, review, and manage resigning employees benefits through a selectable menu and be able to make changes where appropriate.	Optional	Shared Service Center			
SEP004.06	Functional		Solution must automatically generate and distribute letters and emails that explain all the benefits/entitlements to the separating/terminated employee.	Mandatory	Shared Service Center			
SEP005	OPM		Detail an employee to an international organization IAW 5 CFR 352 Subpart C.	Mandatory	Shared Service Center/Agency			
SEP006	OPM		Transfer an employee to an international organization IAW 5 CFR 352 Subpart C.	Mandatory	Shared Service Center/Agency			
SEP006.01	Functional		Transfer an employee to an international organization IAW 5 CFR 352 Subpart C and 5 CFR 352.304,307, and 309.	Mandatory	Shared Service Center			
SEP007.02	Functional		Solution must provide fully automated capability for user (PERSONNELIST) to provide reemployment rights to employees. System must provide manual override capability for user (PERSONNELIST) to be able to modify or cancel this notification.	Mandatory	Shared Service Center			
SEP009.02	Functional		Solution must enable PERSONNELIST to fulfill 5 CFR 353 and USERRA requirements for military service personnel that are separated in order to fulfill military service obligations. (There are no unique GSA requirements.)	Optional	Shared Service Center			
SEP009.03	Functional		Solution must allow users (employees who are activated on military orders) to enter military service obligation dates in the selected HR IT System. System must show military activation periods input by the activated employee.	Optional	Shared Service Center			
SEP009.04	Functional		Solution must allow the user (PERSONNELIST) to be able to recognize military personnel (Air National Guard, Army National Guard, Air Force Reserve, Army Reserve, Naval Reserve, Marine Corps Reserve) on military activation (active duty orders) through an automated select button acknowledging receipt of notification of military activation.	Optional	Shared Service Center			
SEP009.05	Functional		Solution must allow user (PERSONNELIST) to be able to manage HR Actions in support of the activated employee:Continue within grade increases for qualifying employee (serving on active duty military orders).Continue Health Insurance (selectable); HR IT System must provide the user (separating uniformed service employee) with the ability to select Tri-Care or retain Government insurance.Show individual on LWOP as appropriate.Remove from required performance reports/appraisals due/overdue, required training due/overdue and any other automated report system so these individuals are not errantly reported as due/overdue for actions that are not required as a result of their active duty service.	Optional	Shared Service Center			

SEP009.06	Functional		Solution must provide automated workflow process with appropriate (modifiable) sequencing of separation actions. System must provide a check box for users (PERSONNELIST) to generates a selectable menu of required actions to turn off and required benefits to turn on that it can be forwarded to the activated employee who can then acknowledge the actions and select the optional available actions (such as health insurance).	Optional	Shared Service Center
SEP009.07	Functional		Solution must ensure that automated letters and emails notifications to the employee shall be generated prior to activation, after menu selections have been completed, and once the employee is activated and/or separated.	Optional	Shared Service Center
SEP009.08	Functional		Solution must ensure that required notifications/instructions to employee must be modifiable.	Optional	Shared Service Center
SEP009.09	Functional		Solution must have electronic signature capability for the users (activated employee, PERSONNELIST, and supervisor).	Optional	Shared Service Center
SEP009.10	Functional		The solution shall instruct activated employee to complete required actions prior to activation.	Optional	Shared Service Center
SEP009.11	Functional		The solution must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions).	Optional	Shared Service Center
SEP010	OPM		Remove a career Senior Executive Service appointee from the SES IAW 5 CFR 359.	Mandatory	Shared Service Center/Agency
SEP010.01	Functional		Solution must provide a dashboard that shows applicant progress (status) completing required actions (unopened, opened, in progress, complete).	Optional	Shared Service Center
SEP010.02	Functional		Solution must enable user (PERSONNELIST) to initiate and execute SES removal process in a fully automated format. System must enable user (PERSONNELIST) to be able to transmit appropriate form/records to the gaining organization.	Optional	Shared Service Center
SEP010.04	Functional		The solution must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions). Dashboard displays must be aligned according to predefined user role (employee, PERSONNELIST, supervisor, director). Dashboard access and role assignments must be controlled by HR System/Database Administrators.	Optional	Shared Service Center
SEP010.05	Functional		Solution must provide user (PERSONNELIST) with the ability to provide automated 30 day written notice of a furlough to SES.	Optional	Shared Service Center
SEP011	OPM		Separate an employee subject to the mandatory separation provisions IAW 5 USC Chapters 83 and 84.	Mandatory	Shared Service Center/Agency
SEP011.01	Functional		Separate an employee subject to the mandatory separation provisions IAW 5 USC Chapters 83 and 84: 5 USC, 8335 and 8425; 5 CFR 831.502, 831.908, 831.808, 842.806, 842.908	Mandatory	Shared Service Center
SEP011.02	Functional		Solution must ensure separation process is fully automated; system must enable user (PERSONNELIST) to initiate and execute employee separation in a fully automated format.	Optional	Shared Service Center
SEP011.03	Functional		Solution must provide user (PERSONNELIST) with the ability to consolidate all required mandatory separation forms in one location prior to transmission to employee for completion.	Optional	Shared Service Center
SEP011.04	Functional		Solution must provide user (PERSONNELIST) with the ability to manually deselect any form (item) that is not required. System must provide the user (PERSONNELIST) with the ability to add any additional forms as required (either through system or upload)	Optional	Shared Service Center
SEP011.05	Functional		Solution must provide a dashboard that shows applicant progress (status) completing required forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
SEP011.07	Functional		Solution must provide manual override capability for the user (PERSONNELIST).	Optional	Shared Service Center
SEP011.08	Functional		Solution must generate a separation package which includes all required separation documentation.	Optional	Shared Service Center
SEP011.09	Functional		The Solution must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions). Dashboard displays must be aligned according to predefined user role (employee, PERSONNELIST, supervisor, director). Dashboard access and role assignments must be controlled by HR System/Database Administrators.	Optional	Shared Service Center
SEP011.10	Functional		Solution must ensure a PERSONNELIST is able to select from a menu of options (ex: FEHB, FEGLI, TSP, leave) and automatically generate physical notification letter (Removal Letter) that can be provided to employee in accordance with GSA notification processes. Removal letter must fully explain rights to employee.	Optional	Shared Service Center
SEP011.11	Functional		Solution must generate required follow-up separation information to be provided to employee via formal letter and email.	Optional	Shared Service Center
SEP011.12	Functional		Solution must maintain home address and home email address for all employees.	Optional	Shared Service Center
SEP011.13	Functional		Solution needs to ensure all related documents are automatically updated as part of the separation process.	Optional	Shared Service Center
SEP011.14	Functional		The automated written notice shall enable user (PERSONNELIST) to provide the following details in the written notice: 1. The reason for the agency decision to take the furlough action, 2. The expected duration of the furlough and the effective dates. 3. The basis for selecting the appointee for furlough when some but not all Senior Executive Service appointees in a given organizational unit are being furloughed; 4.The reason if the notice period is less than 30 days; 5. The place where the appointee may inspect the regulations and records pertinent to the action; and 6. The appointee's appeal rights, including the time limit for the appeal and the location of the Merit Systems Protection Board office to which the appeal should be sent.	Mandatory	Shared Service Center
SEP012.02	Functional		Solution must ensure the separation process to be fully automated; system must enable user (PERSONNELIST) to initiate and execute employee separation in a fully automated format. System must provide automated workflow process with appropriate (modifiable) sequencing of separation actions.	Optional	Shared Service Center
SEP012.03	Functional		Solution must provide a dashboard that shows applicant progress (status) completing required forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
SEP012.04	Functional		Solution must generate a separation package which includes all required separation documentation.	Optional	Shared Service Center
SEP012.05	Functional		The solution must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions). Dashboard displays must be aligned according to predefined user role (employee, PERSONNELIST, supervisor, director). Dashboard access and role assignments must be controlled by HR System/Database Administrators.	Optional	Shared Service Center
SEP012.06	Functional		Solution must ensure PERSONNELIST to be able to select from a menu of options (ex: FEHB, FEGLI, TSP, leave) and automatically generate physical notification letter (Removal Letter) that can be provided to employee in accordance with GSA notification processes. Removal letter must fully explain rights to employee.	Optional	Shared Service Center
SEP012.07	Functional		Solution must generate required follow-up separation information to be provided to employee via formal letter and email.	Optional	Shared Service Center
SEP012.08	Functional		Solution must maintain home address and home email address for all employees.	Optional	Shared Service Center
SEP012.09	Functional		Solution needs to ensure all related documents are automatically updated as part of the separation process.	Optional	Shared Service Center
SEP013	OPM		Maintain records for all injured employees IAW 5 CFR 353 and DOL Publication CA 810.	Mandatory	Shared Service Center/Agency
SEP013.01	Functional		Maintain records for all injured employees IAW 5 CFR 353.105: DOL Publication CA 810.	Mandatory	Shared Service Center
SEP014	OPM		File an employee or agency-initiated application for disability retirement IAW 5 USC Chapters 83 and 84.	Mandatory	Shared Service Center/Agency
SEP014.01	Functional		File an employee or agency-initiated application for disability retirement IAW 5 USC Chapters 83 and 84: 5 CFR 831.1205 and 844.202.	Mandatory	Shared Service Center
SEP014.02	Functional		Solution must provide automated workflow application process.	Optional	Shared Service Center
SEP014.03	Functional		Solution must provide a dashboard show status (completed actions, pending actions, and remaining actions).	Optional	Shared Service Center
SEP015	OPM		Process a proposed separation action IAW 5 CFR 731 and 5 USC 7513.	Mandatory	Shared Service Center/Agency
SEP015.01	Functional		Process a proposed separation action IAW 5 CFR 731.302, 304, 402; 5 CFR 752.403 and 432.105;5 USC 4303 and 7513 ;5 USC 7521; 5 CFR 930.214; 5 CFR 731.404.	Mandatory	Shared Service Center
SEP015.02	Functional		Solution must ensure process to be fully automated; system must enable user (PERSONNELIST) to initiate and execute employee separation in a fully automated format. System must provide automated workflow process with appropriate (modifiable) sequencing of separation actions.	Optional	Shared Service Center
SEP015.03	Functional		Solution must provide a dashboard that shows applicant progress (status) completing required forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
SEP015.04	Functional		Solutino must generate a separation package which includes all required separation documentation.	Optional	Shared Service Center
SEP015.05	Functional		The solution must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions). Dashboard displays must be aligned according to predefined user role (employee, PERSONNELIST, supervisor, director). Dashboard access and role assignments must be controlled by HR System/Database Administrators.	Optional	Shared Service Center

SEP015.06	Functional		Solution must ensure a PERSONNELIST to be able to select from a menu of options (ex: FEHB, FEGLI, TSP, leave) and automatically generate physical notification letter (Removal Letter) that can be provided to employee in accordance with GSA notification processes. Removal letter must fully explain rights to employee.	Optional	Shared Service Center
SEP015.07	Functional		Solution must generate required follow-up separation information to be provided to employee via formal letter and email.	Optional	Shared Service Center
SEP015.08	Functional		Solution must maintain home address and home email address for all employees.	Optional	Shared Service Center
SEP015.09	Functional		Solution needs to ensure all related documents are automatically updated as part of the separation process.	Optional	Shared Service Center
SEP016	OPM		Assist in RIF procedures resulting from A-76 studies IAW the Federal Activities Reform Act of 1998 and 5 USC.	Mandatory	Shared Service Center/Agency
SEP016.01	Functional		Assist in RIF procedures resulting from A-76 studies IAW the Federal Activities Reform Act of 1998 and IAW P.L 105-270;5 USC5 USC.	Mandatory	Shared Service Center
SEP017	OPM		Process reduction in force of SES IAW 5 CFR 359.	Mandatory	Shared Service Center/Agency
SEP017.01	Functional		Process reduction in force of SES IAW 5 CFR 359.602 and 603.	Mandatory	Shared Service Center
SEP017.02	Functional		Solution must ensure the process to be fully automated; system must enable user (PERSONNELIST) to initiate and execute employee RIF action in a fully automated format. System must provide automated workflow process with appropriate (modifiable) sequencing of required RIF actions.	Optional	Shared Service Center
SEP017.03	Functional		Solution must provide a dashboard that shows applicant progress (status) completing required forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
SEP017.04	Functional		Solution must generate a RIF package which includes all required separation documentation.	Optional	Shared Service Center
SEP017.05	Functional		The solution must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions). Dashboard displays must be aligned according to predefined user role (employee, PERSONNELIST, supervisor, director). Dashboard access and role assignments must be controlled by HR System/Database Administrators.	Optional	Shared Service Center
SEP017.06	Functional		Solution must ensure a PERSONNELIST to be able to select from a menu of options (ex: FEHB, FEGLI, TSP, leave) and automatically generate physical RIF letter (Removal Letter) that can be provided to employee in accordance with GSA notification processes. Removal letter must fully explain rights to employee.	Optional	Shared Service Center
SEP017.07	Functional		Solution must generate required follow-up separation information to be provided to employee via formal letter and email.	Optional	Shared Service Center
SEP017.08	Functional		Solution must maintain home address and home email address for all employees.	Optional	Shared Service Center
SEP017.09	Functional		Solution needs to ensure all related documents are automatically updated as part of the separation process.	Optional	Shared Service Center
SEP018	OPM		Complete an interagency transfer of function IAW 5 CFR 351.	Mandatory	Shared Service Center/Agency
SEP018.01	Functional		Complete an interagency transfer of function IAW 5 CFR 351 Subpart C.	Mandatory	Shared Service Center
SEP018.02	Functional		Requirement is for process to be fully automated; system must enable user (PERSONNELIST) to initiate and execute interagency transfer of function in a fully automated format. System must provide automated workflow process with appropriate (modifiable) sequencing of transfer actions.	Optional	Shared Service Center
SEP018.03	Functional		System must provide PERSONNELIST with the ability to pre-identify positions of competing employees who are included in the transfer process.	Optional	Shared Service Center
SEP018.04	Functional		System must provide PERSONNELIST with the ability to generate an automated canvass letter to employee to ask whether the employee wishes to transfer with the function when the function transfers to a different local commuting area. The canvass letter must give the employee information concerning entitlements available to the employee if the employee accepts the offer to transfer, and if the employee declines the offer to transfer.	Optional	Shared Service Center
SEP018.05	Functional		System must provide employees an automated selectable opportunity to decide whether to transfer as a result of the transfer of function decision.	Optional	Shared Service Center
SEP018.06	Functional		System must provide electronic signature capability for employee to confirm decision.	Optional	Shared Service Center
SEP018.07	Functional		System must generate a transfer of function package which includes all required transfer of function documentation.	Optional	Shared Service Center
SEP018.08	Functional		The system must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions). Dashboard displays must be aligned according to predefined user role (employee, PERSONNELIST, supervisor, director). Dashboard access and role assignments must be controlled by HR System/Database Administrators.	Optional	Shared Service Center
SEP019	OPM		Support a reduction in force IAW 5 CFR 351 and any other appropriate regulations.	Mandatory	Shared Service Center/Agency
SEP019.01	Functional		Support a reduction in force IAW 5 CFR 351 and 353 and any other appropriate regulations.	Mandatory	Shared Service Center
SEP019.02	Functional		Requirement is for process to be fully automated; system must enable user (PERSONNELIST) to initiate and execute a reduction in force in a fully automated format. System must provide automated workflow process with appropriate (modifiable) sequencing of actions.	Optional	Shared Service Center
SEP020	OPM		Support a reduction in force for administrative law judges IAW 5 CFR 930.215 and any other appropriate regulations.	Mandatory	Shared Service Center/Agency
SEP021	OPM		Process personnel actions (including leave) for employees on duty with the uniformed services or who have sustained compensable injuries.	Mandatory	Shared Service Center/Agency
SEP021.01	Functional		Process personnel actions (including leave) for employees on duty with the uniformed services or who have sustained compensable injuries IAW 5 USC, Chapter 63; 5 CFR 353.106 and 208.	Mandatory	Shared Service Center
SEP021.02	Functional		The selected HR IT System must allow users (employees who are activated on military orders) to enter military service obligation dates in the selected HR IT System. System must show military activation periods input by the activated employee.	Optional	Shared Service Center
SEP021.03	Functional		HR IT System must allow the user (PERSONNELIST) to be able to recognize military personnel (Air National Guard, Army National Guard, Air Force Reserve, Army Reserve, Naval Reserve, Marine Corps Reserve) on military activation (active duty orders) through an automated select button acknowledging receipt of notification of military activation.	Optional	Shared Service Center
SEP021.04	Functional		System must allow user (PERSONNELIST) to be able to manage HR Actions in support of the activated employee:	Optional	Shared Service Center
SEP021.05	Functional		Continue within grade increases for qualifying employee (serving on active duty military orders).	Optional	Shared Service Center
SEP021.06	Functional		Continue Health Insurance (selectable); HR IT System must provide the user (separating uniformed service employee) with the ability to select Tri-Care or retain Government insurance.	Optional	Shared Service Center
SEP021.07	Functional		Show individual on LWOP as appropriate.	Optional	Shared Service Center
SEP021.08	Functional		Remove from required performance reports/appraisals due/overdue, required training due/overdue and any other automated report system so these individuals are not errantly reported as due/overdue for actions that are not required as a result of their active duty service.	Optional	Shared Service Center
SEP021.09	Functional		System must provide automated workflow process with appropriate (modifiable) sequencing of separation actions. System must provide a check box for users (PERSONNELIST) to generates a selectable menu of required actions to turn off and required benefits to turn on that it can be forwarded to the activated employee who can then acknowledge the actions and select the optional available actions (such as health insurance).	Optional	Shared Service Center
SEP021.10	Functional		Automated letters and emails notifications to the employee shall be generated prior to activation, after menu selections have been completed, and once the employee is activated and/or separated.	Optional	Shared Service Center
SEP021.11	Functional		Required notifications/instructions to employee must be modifiable.	Optional	Shared Service Center
SEP021.12	Functional		System must have electronic signature capability for the users (activated employee, PERSONNELIST, and supervisor).	Optional	Shared Service Center
SEP021.13	Functional		Need system to instruct activated employee to complete required actions prior to activation.	Optional	Shared Service Center
SEP021.14	Functional		The system must provide a dashboard that shows process progress (completed actions, pending actions and remaining actions).	Mandatory	Shared Service Center
SEP022	OPM		Provide support for the uniformed service provisions found in 5 CFR Part 353 Subpart B.	Optional	Shared Service Center/Agency

SEP022.01	Functional		The selected HR IT System must provide for employees who are reemployed following uniformed service or recovery from compensable injuries, (Upon reemployment, an employee absent because of uniformed service or compensable injury is generally entitled to be treated as though he or she had never left. In addition, agencies have an obligation to consider employees absent on military duty for any incident or advantage of employment that they may have been entitled to had they not been absent.)	Optional	Shared Service Center
SEP022.02	Functional		Selected HR IT System must provide a mechanism by which employees who are absent because of compensable injury or uniformed service can be considered for promotion.	Optional	Shared Service Center
SEP022.03	Functional		Selected HR IT System must ensure employee receives credit for the entire period of the absence; system must provide for continuation of seniority and service accrual, including within-grade increases, careertenure, completion of probation, leave rate accrual, and severance pay during military activation or following compensable injuries.	Optional	Shared Service Center
SEP024	OPM		Notify payroll of an employee's known outstanding debts to the Government upon separation of the employee.	Optional	Shared Service Center/Agency
SEP024.01	Functional		Notify payroll of an employee's known outstanding debts to the Government upon separation of the employee IAW 5 USC 5514; 5 CFR 179.	Optional	Shared Service Center
SEP024.02	Functional		Requirement is for system to be fully integrated where HR and Pay are not separate entities so that outstanding debts of individuals are centrally managed, providing notification to Payroll, HR, supervisors and individuals all at the same time or in sequence (as required). Requirement is to eliminate any manual process that requires HR to "notify" Payroll or vice versa.	Optional	Shared Service Center
SEP024.03	Functional		Requirement is to integrate a separation/clearance checklist so that all agencies are notified of clearance action and that offices can confirm actions have been completed. Requirement is for a sequenced workflow process with appropriate dashboard real-time updates to view progress of separating employee.	Optional	Shared Service Center
SEP025.02	Functional		System must generate an automated letter notifying employee of his rights, obligations, and benefits.	Optional	Shared Service Center
SEP026	OPM		Process claims for the compensation due a beneficiary of a deceased employee IAW 5 CFR 178.	Mandatory	Shared Service Center/Agency
SEP026.01	Functional		The HR IT System must recommend the required forms based on the claim action requested by the user (PERSONNELIST and/or BENEFICIARY)	Optional	Shared Service Center
SEP026.02	Functional		System must provide user (PERSONNELIST) with the ability to consolidate (or access and sequentially order) all required mandatory claims forms that a user (BENEFICIARY CLAIMANT) will be required to complete in order to file a claim).	Optional	Shared Service Center
SEP026.03	Functional		System must provide user (PERSONNELIST) with the ability to manually deselect any form (item) that is not required.	Optional	Shared Service Center
SEP026.04	Functional		System must provide the user (PERSONNELIST) with the ability to add any additional forms as required (either from a picklist within the HR IT system or through system or upload)	Optional	Shared Service Center
SEP026.05	Functional		System must automatically sequence forms in a pre-specified order so they can be routed (transmitted) by the user (PERSONNELIST) to the user (BENEFICIARY/CLAIMANT) in the order they are required to be completed. (System must allow manual adjustment of sequencing by the user [PERSONNELIST]).	Optional	Shared Service Center
SEP026.06	Functional		System must enable user (PERSONNELIST) to route forms and required tasks to user (BENEFICIARY). (Requirement is for process to be fully automated; system must enable user (PERSONNELIST) to execute claims process by hitting a button that routes tasks to user (BENEFICIARY/CLAIMANT).	Optional	Shared Service Center
SEP026.07	Functional		System must provide workflow capabilities for forms that require supervisory review.	Optional	Shared Service Center
SEP026.08	Functional		Distribution of forms from user (PERSONNELIST) to user (BENEFICIARY) must be distributed in a pre-specified (modifiable) order.	Optional	Shared Service Center
SEP026.09	Functional		System must enable user (APPLICANT or EMPLOYEE) to receive, access, and complete forms provided by user (PERSONNELIST).	Optional	Shared Service Center
SEP026.10	Functional		System must maintain a sequence of activities (that is modifiable by the user [PERSONNELIST] that ensures all required secondary actions created by the requested action can be initiated and or completed.	Optional	Shared Service Center
SEP026.11	Functional		System must provide user (PERSONNELIST) with ability to create a module that consolidates all associated actions with the requested claims action to ensure all actions are completed at the same time or in a logical pre-specified sequence.	Optional	Shared Service Center
SEP026.12	Functional		System must provide a dashboard that shows user (BENEFICIARY APPLICANT) progress (status) completing required forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
SEP026.13	Functional		The system must provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions).	Optional	Shared Service Center
SEP026.14	Functional		Dashboard displays must be customized to meet the needs of the user (BENEFICIARY and PERSONNELIST).	Optional	Shared Service Center
SEP026.15	Functional		Dashboard access and role assignments must be controlled by HR System/Database Administrators.	Optional	Shared Service Center
SEP026.16	Functional		System must provide manual override capability for the user (PERSONNELIST) to cancel actions.	Optional	Shared Service Center
SEP026.17	Functional		User (PERSONNELIST) must be able to modify the order in which forms/documents are transmitted.	Optional	Shared Service Center
SEP026.18	Functional		User (PERSONNELIST) must be able to modify incorrect document entries on completed forms.	Optional	Shared Service Center
SEP026.19	Functional		System must provide user (BENEFICIARY APPLICANT) and user (PERSONNELIST) capability to use approved electronic signatures (IAW Chapter 3 Subchapter 3 of the Guide to Processing Personnel Actions.)	Optional	Shared Service Center
SEP026.20	Functional		System must ensure that all documents are electronically signed by the user (BENEFICIARY) prior to transmission.	Optional	Shared Service Center
SEP026.21	Functional		System must provide user (BENEFICIARY) the ability to re-sign a document that has been corrected or revised by the user (EMPLOYEE) or by the user (SUPERVISOR) or by the user (PERSONNELIST)	Optional	Shared Service Center
SEP026.22	Functional		Requirement is for the user (PERSONNELIST) to be able to select from a menu of options to select ITEMS that apply to the claims request.	Optional	Shared Service Center
SEP026.23	Functional		Requirement is for the system to provide the user (PERSONNELIST) with the option to select required actions from a pre-specified list of required actions (in a drop down menu).	Optional	Shared Service Center
SEP026.24	Functional		The system must recommend actions to be taken based on the personnel action requested by the user (PERSONNELIST) from a pre-specified list of actions (options). (System must enable user (HR IT SPECIALIST) to manage list of recommended actions within the HR IT System.)	Optional	Shared Service Center
SEP026.25	Functional		The system must enable the user (PERSONNELIST) to select appropriate/required actions from a drop down menu.	Optional	Shared Service Center
SEP026.26	Functional		Requirement is for system to maintain home address and home email address for all employees.	Optional	Shared Service Center
SEP026.27	Functional		Requirement is for system to generate required follow-up information to be provided to user (BENEFICIARY) via formal letter and email.	Optional	Shared Service Center
SEP026.28	Functional		The solution shall facilitate easy removal of future timecards and payment information from the system upon the separation of an employee, so that time is not submitted to payroll after separation and the employee is not paid	Optional	Shared Service Center
SEP026.29	Functional		The solution shall give supervisors access to a separation indicator in case HR is not alerted of the separation until a later time	Optional	Shared Service Center
SEP027.01	Functional		The solution shall provide automated checklist for user (PERSONNELIST) to provide to user (EMPLOYEE) to follow to complete exit processing and separation activities.	Optional	Shared Service Center
SEP027.04	Functional		The solution shall enable user (PERSONNELIST) to provide directions to user (SEPARATING EMPLOYEE) for equipment return, network removal and transfer of Google documents.	Optional	Shared Service Center
SEP027.05	Functional		The solution shall interface with GCIMS to remove user (SEPARATING EMPLOYEE) facility access and resolve user (SEPARATING EMPLOYEE) clearance status as a result of separation.	Optional	Shared Service Center
SEP027.06	Functional		The solution shall provide notifications to users (OFFICES) that a user (EMPLOYEE) is separating.	Optional	Shared Service Center
SEP027.07	Functional		Requirement is for system to direct government property/equipment turn-in with prompts/alerts to receivers to confirm receipt of equipment using e-signature capability.	Optional	Shared Service Center
SEP027.08	Functional		The solution shall provide user (SECURITY OFFICE) with the ability to update separation and outprocessing checklist when user (EMPLOYEE) turns in ID Card.	Optional	Shared Service Center
SEP027.09	Functional		The solution shall provide user (HSPD-12 POC) with the ability to update separation and outprocessing checklist when user (EMPLOYEE) is removed from GCIMS.	Optional	Shared Service Center
SEP027.10	Functional		The solution shall provide user (PERSONNELIST) with a dashboard showing user (EMPLOYEE) separation and exit processing actions complete and remaining.	Optional	Shared Service Center
SEP027.11	Functional		Requirement is for process to generate automated workflow and dashboard type tracking and sequencing of required actions and full integration with required exit processing and separation touchpoints.	Optional	Shared Service Center
SEP027.12	Functional		Requirement is for exit interview process to be automated. Automated system needs to be aligned with existing manual checklists and directives.	Optional	Shared Service Center

SEP027.13	Functional		The solution shall enable user (HR INFORMATION TECHNOLOGY SPECIALIST) the option to customize and modify pre-specified list of required and recommended forms associated with a separation/exit processing action.	Optional	Shared Service Center
SEP027.14	Functional		The solution shall enable user (PERSONNELIST) access to pre-specified menu of recommended/required forms required to complete separation/exit processing action.	Optional	Shared Service Center
SEP027.15	Functional		The solution shall allow user (PERSONNELIST) to review all selected separation/exit processing action in a module prior to release (initiation).	Optional	Shared Service Center
SEP027.16	Functional		The solution shall provide the user (PERSONNELIST) options to select from a pre-specified menu (drop-down menu) of required and recommended separation/exit processing tasks (PERSONNEL ACTIONS) and assign instructions (COORDINATE, APPROVE, REVIEW, COMPLETE, OTHER) to users (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, SUPPORTING OFFICE).	Optional	Shared Service Center
SEP027.17	Functional		The solution shall provide modular consolidation of separation/exit processing action sub-tasks to enable user (PERSONNELIST) to confirm that a specified separation/exit processing action does not result in duplicated work, unforeseen circumstances, or incomplete work elsewhere in the system.	Optional	Shared Service Center
SEP027.18	Functional		The solution shall ensure all required secondary actions created by the separation/exit processing action are initiated/completed and that appropriate staff (OTHER PERSONNELISTS) are notified of the required secondary actions.	Optional	Shared Service Center
SEP027.19	Functional		The solution shall provide a dashboard for user (PERSONNELIST) to monitor (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) progress (status) completing required separation/exit processing forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
SEP027.20	Functional		The solution shall provide a dashboard that shows separation/exit processing process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
SEP027.21	Functional		Dashboard displays must be customized to meet the needs of the user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
SEP027.22	Functional		The solution shall enable user (EMPLOYEE) to enter and maintain home address for the duration of employment. System must maintain last known address for no less than 30 years following separation. The solution shall allow user (SEPARATED EMPLOYEE) to update home address.	Optional	Shared Service Center
SEP027.23	Functional		The solution shall enable user (EMPLOYEE) to enter and maintain home email address for the duration of employment. System must maintain last known email address for no less than 30 years following separation. The solution shall allow user (SEPARATED EMPLOYEE) to update home email address.	Optional	Shared Service Center
SEP027.24	Functional		The solution shall enable user (PERSONNELIST) to generate required follow-up separation information to be provided to employee via formal letter and email.	Optional	Shared Service Center
SEP028	OPM		Support activities associated with a reduction in force.	Mandatory	Shared Service Center/Agency
SEP028.01	Functional		Support activities associated with a reduction in force IAW 5 USC, 3502;5 CFR 351.	Mandatory	Shared Service Center
SEP028.02	Functional		The solution shall support summary reporting of activities associated with a reduction in force (RIF).	Optional	Shared Service Center
SEP028.03	Functional		The solution shall be capable of providing a dashboard summarizing activities associated with a Reduction in Force (RIF)	Optional	Shared Service Center
SEP029	OPM		Allow a career employee to use accrued annual leave and remain on the agency's rolls after the effective date the employee would otherwise have been separated due to a reduction in force or because of the employee's decision to decline □ relocation if the employeeâ€™s retention would allow the employee to attain eligibility for an immediate annuity and/or establish eligibility to continue health benefits into retirement.	Mandatory	Shared Service Center/Agency
SEP029.01	Functional		Allow a career employee to use accrued annual leave and remain on the agency's rolls after the effective date the employee would otherwise have been separated due to a reduction in force or because of the employee's decision to decline relocation if the employee's retention would allow the employee to attain eligibility for an immediate annuity and/or establish eligibility to continue health benefits into retirement IAW 5 USC 6302(g); 5 CFR 630.212; 5 CFR 351.606(b)(1) and (2).	Mandatory	Shared Service Center
SEP029.02	Functional		The solution shall allow a career employee to use accrued annual leave and remain on the agency's rolls after the effective date the employee would otherwise have been separated due to a reduction in force (RIF), if the employee's retention would allow the employee to attain eligibility for an immediate annuity	Mandatory	Shared Service Center
SEP029.03	Functional		The solution shall allow a career employee to use accrued annual leave and remain on the agency's rolls after the effective date the employee would otherwise have been separated due to a reduction in force (RIF), if the employee's retention would allow the employee to establish eligibility to continue health benefits into retirement.	Mandatory	Shared Service Center
SEP029.04	Functional		The solution shall allow a career employee to use accrued annual leave and remain on the agency's rolls after the effective date the employee would otherwise have been separated because of the employee's decision to decline relocation if the employee's retention would allow the employee to attain eligibility for an immediate annuity.	Mandatory	Shared Service Center
SEP029.05	Functional		The solution shall allow a career employee to use accrued annual leave and remain on the agency's rolls after the effective date the employee would otherwise have been separated because of the employee's decision to decline relocation if the employee's retention would allow the employee to establish eligibility to continue health benefits into retirement.	Mandatory	Shared Service Center
SEP029.06	Functional		The solution shall provide the ability to track separated employees annuity/benefits entitlements.	Mandatory	Shared Service Center
SEP029.07	Functional		The solution shall provide the ability to track separated employees annuity/benefits status.	Mandatory	Shared Service Center
SEP029.08	Functional		The solution shall provide limited users (PERSONNELISTS, SUPERUSERS) the ability to generate reports on separated employees that are eligible to use accrued leave post separation.	Mandatory	Shared Service Center
SEP029.09	Functional		The solution shall provide limited users (PERSONNELISTS, SUPERUSERS) the ability to generate reports on benefits provided to separated employees that are eligible to use accrued leave post separation.	Mandatory	Shared Service Center
SEP030	OPM		Track a separation date.	Mandatory	Shared Service Center/Agency
SEP030.01	Functional		The solution shall support tracking separation dates of EMPLOYEES	Mandatory	Shared Service Center
SEP032	OPM		Support severance pay per eligibility guidelines.	Mandatory	Shared Service Center/Agency
SEP032.01	Functional		The solution shall be capable of implementing automated workflows to assist in initiating severance pay.	Optional	Shared Service Center
SEP032.02	Functional		The solution shall support identification of individuals receiving severance pay per eligibility guidelines.	Mandatory	Shared Service Center
SEP032.03	Functional		The solution shall support reporting on severance pay for limited users (SUPERUSERS, FINANCE)	Mandatory	Shared Service Center
SEP033	OPM		Communicate to employees that they are eligible to file for unemployment compensation.	Optional	Shared Service Center/Agency
SEP033.01	Functional		The solution shall provide reminders / notificaiton to user (PERSONNELIST) to notify users (SEPARATING EMPLOYEES) who are or may be eligible for unemployment □ compensation.	Optional	Shared Service Center
SEP033.02	Functional		The solution shall enable user (PERSONNELIST) to generate an automated letter to send to user (SEPARATING EMPLOYEE) that that they are eligible for unemployment compensation.	Optional	Shared Service Center
SEP033.03	Functional		The solution shall show confirmed receipt of letter by user (SEPARATING EMPLOYEE) to the user (PERSONNELIST).	Optional	Shared Service Center
SEP033.04	Functional		The solution shall enable user (PERSONNELIST) to select this as an optional requirement (integrated) in GSA automated separations/exit processing process for users (EMPLOYEES).	Optional	Shared Service Center
SEP034.01	Functional		The solution shall enable user (PERSONNELIST) to generate an automated letter to send to user (SEPARATING EMPLOYEE) that that they are eligible for unemployment compensation.	Optional	Shared Service Center
SEP034.02	Functional		The solution shall provide user (SEPARATING EMPLOYEE) with a tailored letter that is aligned with individual State unemployment compensation requirements that reflect state unemployment compensation rules, policies, and laws.	Optional	Shared Service Center
SEP034.03	Functional		The solution shall auto-generate unemployment compensation letters/instructions based on employee address.	Optional	Shared Service Center
SEP034.04	Functional		The solution shall show confirmed receipt of letter by user (SEPARATING EMPLOYEE) to the user (PERSONNELIST).	Optional	Shared Service Center
SEP034.05	Functional		The solution shall enable user (PERSONNELIST) to select this as an optional requirement (integrated) in GSA automated separations/exit processing process for users (EMPLOYEES).	Optional	Shared Service Center
SEP034.06	Functional		The solution shall provide a dashboard for user (PERSONNELIST) to monitor (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) progress (status) completing required forms (unopened, opened, in progress, complete).	Optional	Shared Service Center

SEP034.07	Functional		The solution shall provide a dashboard that shows process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
SEP034.08	Functional		Dashboard displays must be customized to meet the needs of the user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
SEP035.01	Functional		The solution shall support capturing an EMPLOYEE's position data as part of separation processing	Mandatory	Shared Service Center
SEP035.02	Functional		The solution shall support capturing an EMPLOYEE's organizational hierarchy data as part of separation processing	Mandatory	Shared Service Center
SEP035.03	Functional		The solution shall support capturing an EMPLOYEE's relevant intellectual capital as part of separation processing.	Optional	Shared Service Center
SEP035.04	Functional		The solution shall support capturing an EMPLOYEE's relevant job-related information as part of separation processing.	Optional	Shared Service Center
SEP036	OPM		Notify appropriate personnel of separation tasks to be performed.	Mandatory	Shared Service Center/Agency
SEP036.01	Functional		The solution shall provide automated checklist for user (PERSONNELIST) to provide to user (EMPLOYEE) to follow to complete exit processing and separation activities.	Optional	Shared Service Center
SEP036.04	Functional		The solution shall enable user (PERSONNELIST) to provide directions to user (SEPARATING EMPLOYEE) for equipment return, network removal and transfer of Google documents.	Optional	Shared Service Center
SEP036.05	Functional		The solution shall interface with GCIMS to remove user (SEPARATING EMPLOYEE) facility access and resolve user (SEPARATING EMPLOYEE) clearance status as a result of separation.	Optional	Shared Service Center
SEP036.06	Functional		The solution shall provide notifications to users (OFFICES) that a user (EMPLOYEE) is separating.	Optional	Shared Service Center
SEP036.07	Functional		Requirement is for system to direct government property/equipment turn-in with prompts/alerts to receivers to confirm receipt of equipment using e-signature capability.	Optional	Shared Service Center
SEP036.08	Functional		The solution shall provide user (SECURITY OFFICE) with the ability to update separation and outprocessing checklist when user (EMPLOYEE) turns in ID Card.	Optional	Shared Service Center
SEP036.09	Functional		The solution shall provide user (HSPD-12 POC) with the ability to update separation and outprocessing checklist when user (EMPLOYEE) is removed from GCIMS.	Optional	Shared Service Center
SEP036.10	Functional		The solution shall provide user (PERSONNELIST) with a dashboard showing user (EMPLOYEE) separation and exit processing actions complete and remaining.	Optional	Shared Service Center
SEP036.11	Functional		Requirement is for process to generate automated workflow and dashboard type tracking and sequencing of required actions and full integration with required exit processing and separation touchpoints.	Optional	Shared Service Center
SEP036.12	Functional		Requirement is for exit interview process to be automated. Automated system needs to be aligned with existing manual checklists and directives.	Optional	Shared Service Center
SEP036.13	Functional		The solution shall provide workflow that routes separation/exit processing forms for supervisory review/signature; from user (PERSONNELIST) to user (SUPERVISOR or DIRECTOR) and returns to user (PERSONNELIST).	Optional	Shared Service Center
SEP036.14	Functional		The solution shall enable the user (PERSONNELIST) to modify the order in which forms/documents are routed (transmitted).	Optional	Shared Service Center
SEP036.15	Functional		The solution shall enable user (PERSONNELIST) to select a separation/exit processing action to generate a pre-specified menu of recommended/required tasks (ITEMS) that can be selected and assigned (routed) to users (OTHER PERSONNELISTS, APPLICANTS, EMPLOYEES, SUPERVISORS, DIRECTORS) for action.	Optional	Shared Service Center
SEP036.16	Functional		The solution shall allow user (PERSONNELIST) to review all selected separation/exit processing actions in a module prior to release (initiation).	Optional	Shared Service Center
SEP036.17	Functional		The solution shall provide the user (PERSONNELIST) options to select from a pre-specified menu (drop-down menu) of required and recommended separation/exit processing tasks (PERSONNEL ACTIONS) and assign instructions (COORDINATE, APPROVE, REVIEW, COMPLETE, OTHER) to users (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, SUPPORTING OFFICE).	Optional	Shared Service Center
SEP036.18	Functional		The solution shall provide a dashboard for user (PERSONNELIST) to monitor (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST) progress (status) completing required separation/exit processing forms (unopened, opened, in progress, complete).	Optional	Shared Service Center
SEP036.19	Functional		The solution shall provide a dashboard that shows separation/exit processing process progress (completed actions, pending (current) actions, next actions, and remaining actions)that is accessible by role (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
SEP036.20	Functional		Dashboard displays must be customized to meet the needs of the user (APPLICANT, EMPLOYEE, SUPERVISOR, DIRECTOR, or OTHER PERSONNELIST).	Optional	Shared Service Center
SEP036.21	Functional		The solution shall enable users (HR SYSTEM/DATABASE ADMINISTRATORS) to control dashboard access through designated role assignments for users (EMPLOYEE, SUPERVISOR, DIRECTOR, PERSONNELIST).	Optional	Shared Service Center
SEP036.22	Functional		The solution shall enable user (EMPLOYEE) to enter and maintain home email address for the duration of employment. System must maintain last known email address for no less than 30 years following separation. The solution shall allow user (SEPARATED EMPLOYEE) to update home email address.	Optional	Shared Service Center
SEP037.01	Functional		The solution shall support EMPLOYEE exit processes IAW the GSA Separation checklist	Optional	Shared Service Center
SEP037.02	Functional		The solution shall support an automated streamlined process to limit manual steps during the EMPLOYEE separation process.	Optional	Shared Service Center
SEP037.03	Functional		The solution's automated workflow shall reflect results of detailed process analysis discussion with vendor selected, and use of completed exit checklist.	Optional	Shared Service Center
SEP037.04	Functional		The solution shall be capable of supporting summary reporting to HR on separation process (e.g. completion rate of steps, and duration at various step)	Optional	Shared Service Center
					TOTAL

PART #	PARAGRAPH #	PARAGRAPH TITLE
RFQ1117146	1.2.2	First Option Period: 12-Month Option Period to start when CLIN 1 is completed.
1.2		SERVICES AND PRICES
1.2		SERVICES AND PRICES
1.2		SERVICES AND PRICES
1.2	1.2.3	SECOND OPTION PERIOD: 6-Month Option
1.2	1.2.3	SECOND OPTION PERIOD: 6-Month Option
RFQ1117146	2.2	Scope
RFQ1117146 and Attachment L -System Requirements	Section 2.2	Scope
2.5	2.5.2	TASK 2 – CONDUCT FIT GAP ANALYSIS, EXECUTE A PROOF OF CONCEPT, AND BEGIN BPR PLANNING
2.5	2.5.2.1 2.5.3.2	SUBTASK 1 – ESTABLISH A FIT/GAP AND PROOF OF CONCEPT ENVIRONMENT SUBTASK 2 – INSTALL AND CONFIGURE APPLICATION/SYSTEM

2.5	2.5.2.2 2.5.3-2.5.4	TASK & SUBTASK Alignments & Numbering
RFQ1117146	Section 2.5.3	Task 3 - ESTABLISH AND MANAGE A PRE-MIGRATION HOSTING ENVIRONMENT
2.5	2.5.3.6	Support Penetration Testing
RFQ1117146	Section 2.5.4, 2.5.5, 2.5.6	2.5.4 TASK 3 – PRE-MIGRATION PREPARATION OF SYSTEMS
RFQ1117146	2.5.6.4	Subtask 4 – Provide Post-Migration Customer Support
2.5	2.5.7.7	Subtask 7 – Provide Help Desk Services
2.5	2.5.7.7	Subtask 7 – Provide Help Desk Services
2.5	2.5.8	Task 8: Provide Security Management
5.1		PERIOD OF PERFORMANCE
5.3		Task Order Schedule and Milestone Dates (Data Cleanup Plan)
7.1	7.1.2 7.1.3	MIGRATION MANAGER FUNCTIONAL LEAD
7.1	7.1.5 & 7.1.7	Managed Services Lead/PM and Enhancement Lead

7.8 and 7.9	N/A	ODCs & Commercial Supplier Agreements
RFQ1117146	7.9.2	Commercial Supplier Agreements
11.7	N/A	Submission of Offerors
RFQ1117146	Section 11.11.5.1	Management Approach (Topic 1)
12.8	12.8.3	Factor 3: Key Personnel and Project Staffing
RFQ1117146	Attachment Z	Pricing Workbook
RFQ1117146	Attachment Z	Pricing Workbook
RFQ1117146	Attachment K	CABS, AGENCIES, INDEPENDENT GOV'T CORPS THAT MAY SELECT ANY SERVICE PROVIDER
General Question – Uptime per month metric		Uptime per Month
General Question – GAMS system		
System Requirements	COMP001.01	

System Requirements	COMP003.03	
System Requirements	COMP141	
System Requirements	COMP155.09	
System Requirements	COMP155.10	
System Requirements	COMP351	
System Requirements	COMP352	
System Requirements	GCOMP259	
System Requirements	GCOMP193	
System Requirements	GCOMP172	
SYSTEM REQUIREMENTS	GNFR044	
SYSTEM REQUIREMENTS	BEN033	
SYSTEM REQUIREMENTS	HRD111.01	
SYSTEM REQUIREMENTS	HRS028.02	
SYSTEM REQUIREMENTS	HRS028.04	
SYSTEM REQUIREMENTS	ORGP052.05	

SYSTEM REQUIREMENTS	GPM023	
SYSTEM REQUIREMENTS	GPM030	
SYSTEM REQUIREMENTS	GPPA140	
SYSTEM REQUIREMENTS	PPA009.03	
SYSTEM REQUIREMENTS	PPA011.07	
SYSTEM REQUIREMENTS	PPA080	
SYSTEM REQUIREMENTS	PPA146.02	
SYSTEM REQUIREMENTS	PPA167.01	
SYSTEM REQUIREMENTS	BEN074.02	
SYSTEM REQUIREMENTS	GHRS009	
SYSTEM REQUIREMENTS	GORGP065	
SYSTEM REQUIREMENTS	GORGP066	
System Requirements	GPPA006	

System Requirements	GPPA085	
System Requirements	GPPA149	
RFQ1117146 Attachment L -System Requirements	Non-Functional	Requirement GNFR035

QUESTION
Can the Government please confirm CLIN 1002 is a Mandatory T&M CLIN?
Attachment K distinguishes CABs that “must be supported by GSA” and others that “may select any service provider”. For initial pricing purposes for the x0003 GSA Managed Services CLINs, is it correct to assume that the offeror will only support those users included in the “CABS that must be supported by GSA.”?
CLIN 2003 is listed as optional in section 1.2.3 and in section 1.2.4, CLIN x003 is mandatory. Please clarify if these mandatory and optional designators for these CLINs are correct.
Should all references to Task 9 be replaced with Task 8, and Task 10 replaced with Task 9?
For CLIN 2008 is the contractor to provide a table similar to that for CLIN 2002 for specific labor categories, hours, and hourly rate?
Are the optional requirements in Attachment L to be staffed and priced under the enhancement CLIN or under implementation?
What is the number of GSA employees and its current customers who will need administrative training? What number require end user training? Would GSA break this out by each of the five entities?
The Attachment L -System Requirements is not consistent with the RFQ - Section 2.2 Scope. Performance Management is not listed as part of the functional requirements scope in the RFQ, while Attachment L includes mandatory Performance Management requirements. Performance Management is not part of the SSC Core HR functionality. Can the government clarify if the Performance Management Non-Core functionality is in scope for this engagement?
Please confirm that 11.11.5.1.h is referring to Section 2.5.2 in the PWS.
It is unclear where the offeror should price the application software licenses and hosting in the base period and 1st Option year period. For the purposes of application software licenses and hosting can the government add 2 FFP CLINs in both the base period and 1st Option period?

The task and subtask numbering seems to be out of sync. 2.5.3 & 2.5.4 are both labeled as Task 3. Please correct the duplication and the following numbers task numbers as well. The Tasks and sub paragraphs are misaligned which would affect correct response. Could the government provide correction of the numbering for clarity?
Will the contractor have access and use of any GSA-provided enterprise-wide licenses to support the solution? For example, will the contractor have access to Oracle database software or security software such as Nessus? If so, would the Government provide a list of the software provided?
The RFP specifies that the contractor shall allow the Government to perform penetration testing of the systems. Is the Government (or their third party contractor) also conducting Security Assessment/Risk Assessment?
Section 2.5.3 is Task 3 – Establish and Manage a Pre-Migration Hosting Environment. Section 2.5.4 is Task 3 – Pre-migration Preparation of Systems. Should task numbering be consistent with the list of tasks in Section 2.5 Tasks? Please clarify.
How many Government sites are expected to receive onsite support?
Can the government clarify if the scope of this task includes only Tier 3 support? The system requirements (Benefits Management, HR Strategy) reference a comprehensive help desk to include Tier 1, Tier 2 and Tier 3 support. However, Attachment O only references Tier 3 support metrics.
Tier 3 Help Desk Phone Response Times described as being the proper response time to the “GSA Help Desk personnel”, whereas Tier 3 Help Desk Response Time is described as being response to “customer inquiries”. Can the Government clarify whether it is intended that customers would be able to contact Tier 3 directly via e-mail?
Please confirm that 11.11.5.2.b is referring to Section 2.5.8 in the PWS.
The government has not specified an assumed start date for this effort. Is October 1, 2016 an appropriate assumption?
There is no reference to the Data Cleanup plan in the RFQ in the cited section (2.5.3.5) or in 2.5.4.2, can you please provide explanation and reference to where it would reside?
Is it correct to assume that the Migration Manager and the Functional Lead are both applicable for only the first 18 months of the Task Order? Would the government consider relaxing the requirement for key personnel for the duration of the contract and require them only through implementation?
Would the government relax the requirement of key personnel to begin work on project start date and consider revise the requirement to begin work at post implementation or option period 3?

In Sections 7.8 and 7.9, the Government contemplates purchase of software components. For example, Section 7.8 provides that the Government may provide contractor with a FAR 51 authorization to allow the contractor to procure off GSA schedules. Further, 7.9 states that licenses must be presented to FEDSIM for approval and contain certain required provisions as outlined. Will the Government clarify when the usage of these clauses apply? Will the Government issue FAR 51 authorization to purchase software required in the initial system set up?
Since the RFQ's purpose is to acquire commercial services as a managed service, would GSA consider removing this requirement from this solicitation? The reason to remove this is because these agreements are established with multiple agencies.
RFP requires Times New Roman. Would the government allow the use of 12 pt. Arial Narrow and 10pt Arial Narrow for graphics and tables in the proposal, as it is cleaner and easier to read?
In Section 11.11.5.1, GSA calls out specific topics to be addressed in the technical write up. Can GSA please clarify the required tasking related to "g. Transitioning-on a new customer within its proposed timeline?" Is the 'customer' referenced one of the five entities referenced, or a net new customer not currently served by GSA?
The text states "In addition, the KPQM will be assessed with respect to Section H.2 criteria as well as…" Can the Government identify/reference the requirements in Section H.2?
The provided pricing templates indicate a cost-plus contract type which is inconsistent with the contract type specified in the RFQ. Would GSA consider modifying the pricing templates to be Time and Materials (T&M) and Firm Fixed Price (FFP) pricing models?
In the 18-month T&M CLIN, the providers are unable to purchase the required hardware, software, and hosting for deployment. Would GSA consider moving the first Firm Fixed Price (FFP) Managed Service CLIN (CLIN 2003) to start within the first three months in order to allow for the purchase of the required software, hardware and hosting services?
U.S. Institute of Peace (Executive) and John F. Kennedy Center for the Performing Arts (Legislative) are listed twice in this table. Please confirm the sub-total and total GSA and customer agencies and CABS.
For the purpose of clarification, can the Government please explain what the difference is between uptime and utilization metrics?
GAMS is absent from the RFP - Is the GAMS service available to provide directory services for GSA users?
Please clarify the types of codes referenced in this requirement - are they specific to labor codes or pay codes (time reporting codes)? What is the maximum number of characters and values?

Please clarify if this is defined as start/end clock t times and translating to HH.M or direct entry time in HH.m or both?
Please clarify what job scheduling is and where the training schedule information is coming from?
Please clarify if the T&A system is expected to integrate with the financial management system or if this information flows through payroll to the FMS system.
Please clarify where the timecard data is to be combined from the integrated T&A system.
Please clarify what systems the T&A solution is expected to interface with.
Please clarify types of transactions and what the internal and external systems that send this information.
Please clarify the difference between a labor card and a timecard.
Please define the expected exception categories.
Is the requirement to use daily entered time to compile a biweekly timesheet for payroll submission or is there something additional that needs to be derived?
It appears the ICD to the GCIMS system is not in the appendix. Could you please provide a copy?
Please clarify what benefits plans are included on the statement? Are dental and vision included on the statement? Is the employer or employee costs included on the statement?
Could the government please clarify the meaning of "knowledge-sharing opportunities". Does this refer to a knowledge-sharing capability as part of knowledge management?
Can the government clarify the specific sources which will require interfaces? It is clear that an interface from the GSA financial system (Pegasys) is required. Are interfaces to other agency financial systems required? If so could you please provide the necessary documentation?
Could the government please clarify whether data from a staff acquisition system needs to integrate with core HR?
It appears the ICD for the Pegasys system was not included in the Appendix. Could the government please provide the necessary documentation?

Does the government expect the new performance management system to integrate with the “awards and recognition system”? If so where does this system reside and who is the current owner of the system.
Please clarify if this is full appraisals or ratings only? Also, could you please provide additional information to clarify the statement, “the appraisals will go through the standard awards-approval process”?
Please clarify the HR system to which the solution should integrate.
Please clarify if the forms referenced in this paragraph relate to Entrance On Duty and SF-52 and SF-50.
Please clarify if the forms referenced in this paragraph are related to Entrance On Duty and the SF52 and SF-50 form.
Please clarify whether there is a staff acquisition system and/or Entrance On Duty system that the HR system needs to integrate with.
Please confirm that the BI system referenced in this paragraph is the existing Business Objects solution.
Is there an existing or envisioned data warehouse for storing historical archive data?
Please confirm that providing certain payroll processing services (outlined in this requirement) is part of the role of the SSC and not a requirement of the agency?
Please clarify whether the government requires an interface to the Position Management Universe (PMU)?
What system is being referenced for this real-time, bi-directional interface?
Does this requirement reference the same position management system that is referenced in requirement GORGP065?
Does this requirement represent a function that the current payroll system does not perform, and therefore is desired in the new HR system?

Does this requirement represent a function that the current payroll system does not perform, and therefore is desired in the new HR system?
Are we correct to assume that the batch nightly updates from OPM's employee express would be to the new HR system instead of the payroll system?
Requirement GNFR035 listed in Attachment L indicates an interface between GCIMS and the SSC as defined in HRT2T Program Interface Control Document (ICD), but there is no GCIMS ICD. Would the government provide the ICD for GCIMS specifications at this time?

GOVERNMENT RESPONSE
See updated Section 1.2.2 of RFQ with added mandatory marking
All customers listed in Attachment K will be supported under managed services for CLINs X003. See updated RFQ Attachment K.
See updated Section 1.2.3 of RFQ with note clarifying CLIN X003
See updated subsections under 1.2 of the RFQ with updated task markings
See updated Section 1.2.3 of RFQ with added Labor Category/Hour/Hourly Rate table
Per the Definitions Tab in the amended Attachment L: "Mandatory requirements must be provided for GSA to accept the system. Optional requirements are those requirements that are useful for GSA or our partner agencies, but can be provided through the offeror's proposed solution or as an enhancement. These have no relation to "optional CLINs / tasks" in the PWS."
Contractors shall propose an appropriate number of administrators that should be designated and trained for each of the five entities, based on the total number of employees that will be supported in each of those environments as defined in Attachment K. The Contractor's solution shall propose an appropriate solution for end user training.
Section 2.2 states that "functionality requirements primarily fall within four HR LOB sub-functions" and that "other sub-function requirements can be found in Section 9 - Attachments L and M". Performance Management is in scope as defined in Attachment L.
See updated Section 11.11.5.1 ; bullet (H) of the RFQ
The Government is acquiring managed services through an OPM approved shared service provider, and therefore does not intend to acquire software licensing or a hosting environment.

See updated heading titles for 2.5.4, 2.5.5, and 2.5.6 in the RFQ.
Any Nessus reports with results of penetration testing performed by GSA would be provided to the contractor for corrective action. However, it is expected that contractors shall have its own software/licenses to perform these actions.
Yes, the Government will perform the penetration testing and system assessment/risk in conjunction with contractor to complete the initial ATO.
See updated heading titles for 2.5.4, 2.5.5, and 2.5.6 in the RFQ.
The Government expects a minimum of two locations; however, an exact number cannot be determined until after migration.
The scope of the referenced subtask includes only Tier 3 systems support. The references to Tier 1 and Tier 2 support have been removed from the requirements in the amended Attachment L.
The Government is responsible for Tier 1 and Tier 2 support personnel and will pass Tier 3 Systems Support issues to the contractor. The Government does not intend for end users to contact the contractor Tier 3 personnel directly.
Yes, 2.5.8 is one section of the RFQ that addresses security management.
The Government anticipates award in the first quarter of Government Fiscal Year 2017
The Deliverable table reference to a Data Cleanup Plan (Deliverable 24) in Section 2.5.3.5 is an error. See the updated Section reference to Section 2.5.4.2. The Data Migration Plan should include the data cleanup plan.
See revision in Section 7.1 of the RFQ.
See updated Sections of RFQ: 11.8 bullet (c), 11.9.1, 11.9.2, and the updated Key Personnel Qualifications Matrix template.

No RFQ changes will be made .
No RFQ changes will be made.
See RFQ Section 11.7 Submission of Offers for submission details. No adjustments will be made at this time.
New customer refers to a new CAB that GSA would be expected to support.
See updated Section 12.8.3 of RFQ with adjustment from Section H.2 to Section 7.1.
See updated RFQ Attachment Z - Pricing Workbook
The Government is acquiring a managed services through an OPM approved shared service provider, and therefore does not intend to acquire software licensing or a hosting environment.
See updated Attachment K in the RFQ, which removed duplicate entries.
Uptime refers to the amount of time the system is operational and accessible. Examples of utilization metrics include the percentage of users on the system at specific times, number of transactions processed in a given period, capacity utilization percentage for the various system resources; utilization metrics align to response time metrics for purposes of analyzing trends and issues
SecureAuth is the preferred authentication method. GAMS is not an available service.
This requirement refers to pay codes and accounting codes. The contractor shall propose a solution to address pay codes and accounting codes. The specific number of characters and values will be discussed during Fit/Gap Analysis

The minutes relates to hours worked per day and shall be restricted to one decimal place designating increments of an hour - i.e. 6.1 hours equals six hours and six minutes of work. This is an OPM defined requirement; please refer to OPM's website for additional information at the following link: https://www.opm.gov/services-for-agencies/hr-line-of-business/enterprise-architecture/#url=Business-Reference-Model
The T&A system will integrate with the payroll system (PAR) and PAR integrates with the financial system. Refer to the PAR ICD for T&A interfaces with the Payroll system.
This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
The T&A system will interface with the payroll system (PAR) and the new HR system acquired through this solicitation.
Please refer to the ICD for the Payroll, Accounting and Reporting System (PAR)
This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
GSA's current ETAMS system categorizes valid T&A exception codes into various categories such as 'Regular Scheduled Hours', 'Hours Used', 'Hours Earned,' 'FMLA', and 'Telework'. Final definitions and configuration values will be determined during Fit/Gap Analysis.
For people entering daily time, the total time must be calculated for the pay period for the payroll submission
See the added Attachment BB - GCIMS ICD, included in the amendment to the RFQ.
This is an OPM defined requirement; please refer to OPM's website for additional information at the following link: https://www.opm.gov/services-for-agencies/hr-line-of-business/enterprise-architecture/#url=Business-Reference-Model
This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
The ICDs attached in the RFQ (Attachments O-T, BB) contain all the necessary interfaces to and from the HR and T&A systems
Yes, data from a staff acquisition system needs to integrate with core HR.
The financial related information is sent from PAR to the HR system, and PAR has the interface with Pegasys. The vendor should review the PAR ICD for financial related information.

Both Performance Management and Awards and Recognition should be part of the HR solution provided by the contractor
The solution shall have the capability to upload full appraisal information and ratings, from data contained in attachments (i.e. spreadsheet), and once successfully loaded into the system, the appraisals should route through a GSA defined workflow approval route and adhere to GSA policy rules.
This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
This is an OPM defined requirement; please refer to OPM's website for additional information at the following link: https://www.opm.gov/services-for-agencies/hr-line-of-business/enterprise-architecture/#url=Business-Reference-Model
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Yes
This refers to a BI system that may be included in the contractor solution as well as a potential new interface with a current or future GSA BI solution.
There is a future data warehouse envisioned.
The requirement BEN074.02 was not contained in Attachments L1 and L2.
This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
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This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
See the added Attachment BB - GCIMS ICD, included in the amendment to the RFQ.

PRICING WORKBOOK - ATTACHMENT Z

Price Quote Labor Hour Workbook Notes & Instructions

General

* Offerors shall add rows to provided worksheets as needed to fulfill the Government's instructions. Offerors may expand cells as needed to allow space to respond. Fold-out documents are permissible for price quote hard copies.
* Offerors shall use the same format for defined fields in the Project Staffing Plan as they use for the corresponding defined fields in the Price Quote - Labor Hour Workbook, (e.g., if the "Post Migration Support" are formatted as a Number with zero decimal places in the Price Quote, then the "Post Migraton Support" in the Project Staffing Plan shall also be formatted as a Number with zero decimal places.)
* To the extent possible, Offerors shall preserve the sequence of rows in the Project Staffing Plan the same as the sequence of corresponding rows in the Price Quote - Labor Hour Workbook.
* Offerors shall use formulas that are visible for Government evaluators and clearly convey the calculations used to determine products, sums, subtotals, totals, and other results. Worksheet cells shall not be locked.
* Offerors shall use explanatory notes to clarify the meaning of the Price Quote Labor Hour Workbook.

BASE PERIOD MANDATORY LABOR SUMMARY (6-Month Period)
Phase 1 - CLIN 0001 (Tasks 1&2)

Labor Category	Number of Hours	GSA Schedule Hourly Rate	Proposed Discount %	Discounted Rate	Total NTE Ceiling (Discounted Rate x Number of Hours)
GRAND TOTAL					

OMB Approval 2700-0042

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE	PAGE	OF	PAGES
	1		1

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. *(If applicable)*
Amendment 02	**August 18, 2016**		**2016007GS**

6. ISSUED BY CODE

General Services Administration
FEDSIM Acquisition/Millicent Hawkins 703 605-3654
1800 F Street, NW
Washington, DC 20405

7. ADMINISTERED BY *(If other than Item 6)* CODE

8. NAME AND ADDRESS OF CONTRACTOR

CODE FACILITY CODE

(☐)

9A. AMENDMENT OF SOLICITATION NO.
GSC-QF0B-16-33040

9B. DATED ***(SEE ITEM 11)***
July26, 2016

10A. MODIFICATION OF CONTRACT/ORDER NO.

10B. DATED ***(SEE ITEM 13)***

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

___ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is [X] extended, [ ] is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:(a) By completing Items 8 and 15, and returning ___ copy of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATA SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and data specified.

12. ACCOUNTING AND APPROPRIATION DATA *(If required)*

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(☐) A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: *(Specify authority)* THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.

B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES *(such as changes in paying office, appropriation date, etc.)* SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).

C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:

D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor ___is not, __ is required to sign this document and return ___ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION *(Organized by UCF section headings, including solicitation/contract subject matter where feasible.)*

The purpose of this amendment is to:

1. Extend the submission date for RFQ Parts I, II, and III <u>only</u> as stated in the RFQ Cover letter.
   The materials listed for **PARTS I, II, and III** shall be submitted no later than **August 30, 2016, 11:00 am** Eastern Time (ET).
   The materials listed for **PART IV,** the submission date remains <u>unchanged</u> at no later than **September 9, 2016, 11:00 am ET.**

All other requirements remain unchanged.

Except at provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER *(Type or print)*		16A. NAME AND TITLE OF CONTRACTING OFFICER *(Type or print)*	
		Mark Santasiero	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA BY	16C. DATE SIGNED
(Signature of person authorized to sign)		*(Signature of Contracting Officer)*	

OMB Approval 2700-0042

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE	PAGE	OF	PAGES
	1		1

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. *(If applicable)*
Amendment 03	**August 22, 2016**		**2016007GS**

6. ISSUED BY CODE

General Services Administration
FEDSIM Acquisition/Millicent Hawkins 703 605-3654
1800 F Street, NW
Washington, DC 20405

7. ADMINISTERED BY *(If other than Item 6)* CODE

8. NAME AND ADDRESS OF CONTRACTOR

CODE FACILITY CODE

(☐)

9A. AMENDMENT OF SOLICITATION NO.

GSC-QF0B-16-33040

9B. DATED ***(SEE ITEM 11)***

July26, 2016

10A. MODIFICATION OF CONTRACT/ORDER NO.

10B. DATED ***(SEE ITEM 13)***

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

___ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is ☐ extended, ☒ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:(a) By completing Items 8 and 15, and returning ___ copy of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATA SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and data specified.

12. ACCOUNTING AND APPROPRIATION DATA *(If required)*

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(☐) A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: *(Specify authority)* THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.

B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES *(such as changes in paying office, appropriation date, etc.)* SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).

C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:

D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor ___is not, __ is required to sign this document and return ___ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION *(Organized by UCF section headings, including solicitation/contract subject matter where feasible.)*

The purpose of this amendment is to:

1. Update the Quantity and Unit for CLINs 1104, 1105, 1106 and 1107.

All other requirements remain unchanged.

Except at provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER *(Type or print)*		16A. NAME AND TITLE OF CONTRACTING OFFICER *(Type or print)*	
		Mark Santasiero	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA BY	16C. DATE SIGNED
(Signature of person authorized to sign)		*(Signature of Contracting Officer)*	

REQUEST FOR QUOTE (RFQ)

GSC-QF0B-16-33040

General Services Administration (GSA) Human Resources (HR) and Time and Attendance (T&A) Systems, Migration and Managed Service Support

in support of:

Office of Human Resource Management (OHRM)

Issued to:
ALL CONTRACTORS UNDER GSA Schedule *738 X*
Special Item Number 595-*22 and 595-26*

The Contractor's Basic GSA Schedule contract is applicable to the Task Order that is awarded under this RFQ

Conducted under FAR 8.4.

Issued by:
General Services Administration
Federal Systems Integration and Management Center (FEDSIM)
1800 F Street, NW
(QF0B)
Washington, D.C. 20405

July 26, 2016

FEDSIM Project Number 2016007GS

1.1 ORDER TYPE

The contractor shall perform the effort required by this Task Order (TO) on a Firm-Fixed-Price (FFP) and Time and Materials (T&M) basis. The work shall be performed in accordance with all Sections of this TO and the offeror's General Services Administration (GSA) Multiple Award Schedule (MAS), under which the resulting TO will be placed. An acronym listing to support this Request for Quote (RFQ) is included in Section 9 - List of Attachments, Attachment B).

1.2 SERVICES AND PRICES

Although long-distance travel may be reimbursed, the contractor shall not be reimbursed for local travel. Local travel is defined as: (1) travel within a 50 mile radius of the job site, (2) 50 miles from the employee's residence, (3) travel to and from the employee's residence and the job site, and (4) travel between the contractor's offices and travel between contractor's office and the work site.

Travel shall be pre-approved by the Federal Systems Integration and Management Center (FEDSIM) Contracting Officer's Representative (COR). For travel reimbursement, the contractor shall submit a Trip Report to include travel expenses to the COR for audit. Travel shall not exceed the awarded not to exceed (NTE) amounts.

The following abbreviations are used in this price schedule:

CABS	Commissions and Boards
CLIN	Contract Line Item Number
FFP	Firm-Fixed-Price
NCUA	National Credit Union Administration
NTE	Not-to-Exceed
ODC	Other Direct Costs
OPM	Office of Personnel Management
RRB	Railroad Retirement Board
T&M	Time and Materials
USIP	United State Institute of Peace

1.2.1 BASE PERIOD: 6-Month Period

MANDATORY T&M CLIN

CLIN	Description	Total Hours	Total NTE Ceiling
0001	Phase 1- Fit/Gap Analysis, Proof of Concept, and BPR Planning (Tasks 1 and 2)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
0009	Long-Distance Travel	NTE	$160,000
0010	ODCs	NTE	$ 3,500

TOTAL BASE PERIOD CLINs: $ _____

1.2.2 FIRST OPTION PERIOD: 12-Month Option Period to start when CLIN 1 is completed.

MANDATORY T&M CLINs

T&M CLINS CLIN	Description	Total Hours	Total NTE Ceiling
1002	Phase 2 – HR and T&A Migration (Tasks 1,3,4,5,6,8)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
1009	Long-Distance Travel	NTE	$200,000
1010	ODCs	NTE	$ 3,500

TOTAL FIRST OPTION PERIOD CLINs: $_____

1.2.3 SECOND OPTION PERIOD: 6-Month Option Period

MANDATORY T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
2002	Post-Migration Support (Tasks 1,3,4,5,6,8)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
2003*	GSA Managed Services (including CABS) (Task 1,7,8)	6	Month	$
2004	OPM Managed Services (Tasks 1,7,8)	6	Month	
2005	NCUA Managed Services (Tasks 1,7,8)	6	Month	
2006	RRB Managed Services (Tasks 1,7,8)	6	Month	
2007	USIP Managed Services (Tasks 1,7,8)	6	Month	

*Note: CLIN X003 will become mandatory in future option periods

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
2008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
2009	Long-Distance Travel	NTE	$192,000
2010	ODCs	NTE	$ 3,500

TOTAL SECOND OPTION PERIOD CLINs: **$_____**

1.2.4 THIRD OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
3003	GSA Managed Services (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
3004	OPM Managed Services (Tasks 1,7,8)	12	Month	
3005	NCUA Managed Services (Tasks 1,7,8)	12	Month	
3006	RRB Managed Services (Tasks 1,7,8)	12	Month	
3007	USIP Managed Services (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
3008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
3009	Long-Distance Travel	NTE	$50,000
3010	ODCs	NTE	$ 3,500

TOTAL THIRD OPTION PERIOD CLINs: **$_____**

1.2.5 FOURTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
4003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
4004	OPM (Tasks 1,7,8)	12	Month	
4005	NCUA (Tasks 1,7,8)	12	Month	
4006	RRB (Tasks 1,7,8)	12	Month	
4007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
4008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
4009	Long-Distance Travel	NTE	$51,500
4010	ODCs	NTE	$ 3,500

TOTAL FOURTH OPTION PERIOD CLINs: $_____

1.2.6 FIFTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
5003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
5004	OPM (Tasks 1,7,8)	12	Month	
5005	NCUA (Tasks 1,7,8)	12	Month	
5006	RRB (Tasks 1,7,8)	12	Month	
5007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
5008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
5009	Long-Distance Travel	NTE	$53,045
5010	ODCs	NTE	$ 3,500

TOTAL FIFTH OPTION PERIOD CLINs: $_____

1.2.7 SIXTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
6003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
6004	OPM (Tasks 1,7,8)	12	Month	
6005	NCUA (Tasks 1,7,8)	12	Month	
6006	RRB (Tasks 1,7,8)	12	Month	
6007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
6008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
6009	Long-Distance Travel	NTE	$54,637
6010	ODCs	NTE	$ 3,500

TOTAL SIXTH OPTION PERIOD CLINs: $_____

1.2.8 SEVENTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
7003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
7004	OPM (Tasks 1,7,8)	12	Month	
7005	NCUA (Tasks 1,7,8)	12	Month	
7006	RRB (Tasks 1,7,8)	12	Month	
7007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
7008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
7009	Long-Distance Travel	NTE	$56,277
7010	ODCs	NTE	$ 3,500

TOTAL SEVENTH OPTION PERIOD CLINs: $_____

1.2.9 EIGHTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
8003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
8004	OPM (Tasks 1,7,8)	12	Month	
8005	NCUA (Tasks 1,7,8)	12	Month	
8006	RRB (Tasks 1,7,8)	12	Month	
8007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
8008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
8009	Long-Distance Travel	NTE	$57,996
8010	ODCs	NTE	$ 3,500

TOTAL EIGHTH OPTION PERIOD CLINs: $_____

1.2.10 NINTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
9003	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
9004	OPM (Tasks 1,7,8)	12	Month	
9005	NCUA (Tasks 1,7,8)	12	Month	
9006	RRB (Tasks 1,7,8)	12	Month	
9007	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
9008	Enhancements, Future System Functionality, and Other Services (Task 9)	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
9009	Long-Distance Travel	NTE	$59,705
9010	ODCs	NTE	$ 3,500

TOTAL NINTH OPTION PERIOD CLINs: $_____

1.2.11 TENTH OPTION PERIOD: 12-Month Option Period

MANDATORY FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
1103	GSA (including CABS) (Task 1,7,8)	12	Month	$

OPTIONAL FFP CLINs

CLIN	Description	QTY	Unit	Total Firm Fixed Price
1104	OPM (Tasks 1,7,8)	12	Month	
1105	NCUA (Tasks 1,7,8)	12	Month	
1106	RRB (Tasks 1,7,8)	12	Month	
1107	USIP (Tasks 1,7,8)	12	Month	

OPTIONAL T&M CLINs

CLIN	Description	Total Hours	Total NTE Ceiling
1108	Enhancements, Future System Functionality, and Other Services (Task 9	Insert total hours for all labor identified below	

Labor Category	Hours	Hourly Rate
List specific labor categories		
TOTAL HOURS		

TRAVEL and ODC CLINs

CLIN	Description		Total NTE Price
1109	Long-Distance Travel	NTE	$61,497
1110	ODCs	NTE	$ 3,500

TOTAL NINTH OPTION PERIOD CLINs: **$_____**

GRAND TOTAL ALL CLINs: **$_____**

1.3 SECTION 1 - SUPPLIES OR SERVICES AND PRICE/COSTS TABLES

1.3.1 INDIRECT/MATERIAL HANDLING RATE

Long-Distance Travel and ODC costs incurred may be burdened with the contractor's indirect/material handling rate in accordance with the contractor's disclosed practices.

a. If no indirect/material handling rate is allowable in accordance with the contractor's disclosed practices, no indirect/material handling rate shall be applied to or reimbursed on these costs.

b. If no rate is specified in the Basic Contract, no indirect rate shall be applied to or reimbursed on these costs.

c. If no rate is specified in the schedule of prices above, no indirect rate shall be applied to or reimbursed on these costs.

The indirect handling rate over the term of the TO shall not exceed the rate specified in the schedule of prices above.

1.3.2 LIMITATION ON OTHER DIRECT COSTS

ODCs incurred on GSA Schedule TOs are limited to a maximum of $3,500 over the life of the TO.

1.3.3 TIME & MATERIAL LABOR MIX AND LEVEL OF EFFORT

The labor mix and level of effort specified in the contractor's quote and incorporated into this Order are for estimation purposes. The contractor may re-allocate, with prior written approval of the FEDSIM COR, the number of hours by labor category, within each labor CLIN as needed to effectively manage the project, provided the total funded labor cost and total hours are not exceeded. Any additional labor categories or increases to total hours or increases to ceilings required during performance must be approved by the Contracting Officer (CO) and added to the TO by modification.

1.4 INCREMENTAL FUNDING

1.4.1 INCREMENTAL FUNDING LIMITATION OF GOVERNMENT'S OBLIGATION

Incremental funding in the amount of $XX,XXX,XXX for CLINs 0001, 0009, and 0010, is currently allotted and available for payment by the Government. Additional incremental funding for these CLINs will be allotted and available for payment by the Government as the funds become available. The estimated period of performance covered by the allotments for the mandatory CLINs is from award through six months. The TO may be modified to add funds incrementally up to the maximum of $***,***,*** over the performance period of this TO. These allotments constitute the estimated cost for the purpose of Federal Acquisition Regulation (FAR) Clause 52.232-22, Limitation of Funds, which applies to this TO on a CLIN-by-CLIN basis.

Incremental Funding Chart

See Section 9, Attachment U - Incremental Funding Chart (Excel Spreadsheet).

2.1 BACKGROUND

For more than half a century, the GSA has carried out a mission of servicing other Federal agencies by providing superior workplaces, quality acquisition services, and expert business solutions. In alignment with the agency mission, GSA requested and received designation in 2010 as a Human Resources (HR) Line of Business (LOB) Shared Service Center (SSC). GSA currently provides HR, Time and Attendance (T&A), payroll systems, and back-office business operational services to GSA and 32 external client agencies, including approximately 21,000 employees. Client agencies include small and medium-size Federal agencies such as Office of Personnel Management (OPM) and small Presidential Commissions and Board Services (CABS). Some of the external agencies and CABS have their own staffs that provide HR and T&A back-office operational services/functions and use GSA's systems, while others are serviced by GSA. In the latter case, GSA employees perform the functions on behalf of the CABS.

The current systems result in delays, handoffs, errors, data inconsistencies, dual data entry, and the implementation of many manual processes to make up for deficient levels of automation. This results in the inefficient use of senior resources to address and correct errors and inconsistencies and respond to employee inquiries about the errors.

In an effort to strengthen its focus on its core missions, GSA made the decision to divest its technology services related to HR LOB Shared Services and procure the services of an Office of Management and Budget (OMB) and OPM-approved private SSC that shall migrate GSA and its 32 external customers to a managed service solution for HR and T&A systems. GSA will retain its Payroll LOB status and will continue to provide back-office business operational services to its current internal and external customers, utilizing the new systems.

GSA is leading the effort to migrate, along with other external entities that it services, from its internal systems to a contractor solution. GSA and the existing entities it services today will migrate to the new solution, segregated into five different future environments in a manner to be designed by the contractor.

Although GSA is managing the migration, the shared services contractor shall serve five distinct entities post-implementation; specifically:

1. GSA (includes CABS and other very small Government Executive organizations)
2. OPM
3. National Credit Union Administration (NCUA)
4. Railroad Retirement Board (RRB)
5. United States Institute of Peace (USIP)

Post-migration, the HR LOB SSC roles and responsibilities move from GSA to the private SSC contractor. GSA will retain its Payroll LOB status and, as such, will continue to provide payroll back-office business operational services to its current internal and external customers, utilizing the new systems in the five environments to do so.

As an HR LOB Shared Services Provider, the contractor shall offer solutions that align to the Chief Human Capital Officers' (CHCO) visions and goals.

2.1.1 FUTURE REQUIREMENTS

GSA envisions a solution to promote economies of scale across the five agencies while allowing each agency the ability to configure in accordance with specific agency requirements.

The new solution must integrate with GSA systems, including payroll and systems of the other four entities, and provide various output files to satisfy reporting and other entity requirements.

Post-migration, each of the five agencies shall be treated as separate entities, leveraging common infrastructure and applications where feasible, while allowing each entity to establish the technical requirements of their environments over the life of the contract. A single solution and TO will be developed and administered by GSA FEDSIM. Once the HR and T&A migration has been completed, GSA and the other four entities may determine the appropriate strategy for replacing or retaining any remaining systems and automating current manual processes. GSA and the other entities may evaluate and potentially add functionality for other HR-related systems available through or from the new SSC, as well as directly from other system contractors. Any of the five entities may engage with the contractor for additional services to assist with any of these or other HR-related technology initiatives.

Although the Government anticipates one solution, the five entities shall each establish the technical requirements of their environments. Implications of establishing five different environments include:

a. If an entity requests the enablement of additional features, reports, or extensions to the software to provide additional functionality (not available through configuration), the requesting development and implementation shall occur in only their environment, unless another entity requests the same change in their environment.
b. No one entity would be impacted by actions of the other entities.
c. Entities can configure and use their own testing, training, and production environments as they see fit.
d. If an entity is implementing a change and has the environment offline, the others are not impacted.
e. If one entity's environment is down, the others may not necessarily be down.
f. Entities can have their own/unique security solution such as single sign-on.
g. Authority to Operate (ATO) requirements would be defined by each entity.
h. Entities will have their own help desk environments and processes as well as incident management processes, including different phone numbers, voice response scripts, help desk electronic mail (email) addresses, etc.

Contractors shall provide a cost-effective solution that allows for variation across the five entity environments.
In addition, over time, any of the five entities may request the expansion of already existing services, such as increasing help desk services, hosting, managed services, or software and tools.

The contractor shall also support GSA with onboarding new CABS to the GSA environment, and likewise, migrating CABS off the GSA environment if they are disbanded or move to another service provider. In some cases, new CABS may be large enough to substantiate a new, separate environment to allow that larger entity to set the future direction of its environment, in the same manner that the original five entities are setting unique directions.

2.1.2 PURPOSE

The purpose of this TO is to provide HR and T&A solutions and associated managed services that shall support GSA core HR and T&A business functions.

2.1.3 AGENCY MISSION

GSA was established by President Harry Truman on July 1, 1949, to streamline the administrative work of the Federal Government. GSA consolidated the National Archives Establishment, the Federal Works Agency, and the Public Buildings Administration; the Bureau of Federal Supply and the Office of Contract Settlement; and the War Assets Administration into one Federal agency tasked with administering supplies and providing workplaces for Federal employees.

Today, through its two largest offices - the Public Buildings Service and the Federal Acquisition Service - and various staff offices, GSA provides workspace to more than one million Federal civilian workers, oversees the preservation of more than 480 historic buildings, and facilitates the Federal Government's purchase of high-quality, low-cost goods and services from quality commercial contractors.

2.2 SCOPE

The general scope for this acquisition is to migrate GSA and its current customers from GSA's internal HR & T&A systems to an OPM- and OMB-approved private SSC contractor-managed shared services solution for the five entities as defined herein (Section 2.1).

a. Phase 1 entails conducting a fit/gap analysis, developing a proof of concept, planning for future Business Process Realignment (BPR) activities, and associated program management tasks.

b. Phase 2 is the migration from GSA's current systems to a contractor-managed solution consisting of five distinct entity environments.

c. Phase 3 is post-migration, and includes the associated managed services that shall support the implemented HR and T&A solutions as well as optional CLINs for potential additional work in the distinctive environments. This phase shall also include post-migration support activities.

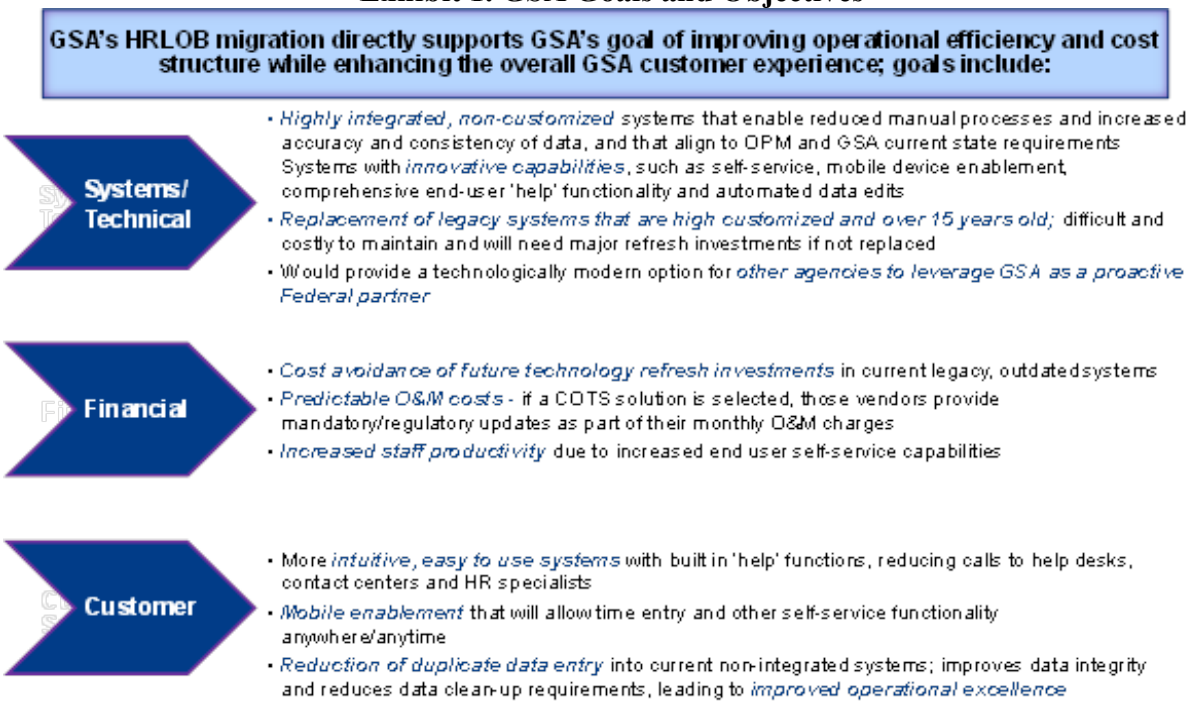
GSA's HR and T&A functional requirements, which define what the system must do, primarily fall within four HR LOB sub-functions—Personnel Action Processing, Benefits Management, Organization and Position Management, and Compensation Management-T&A. In addition, GSA requires interfaces with its HR-related systems, including a payroll system. Other sub-function requirements can be found in Section 9-Attachments L and M.

The contractor shall implement to the maximum extent practicable Commercial Off-the-Shelf (COTS) products tailored through configurations or extensions that reside outside of the base COTS software. The contractor's solution for meeting the HR and T&A system requirements shall accommodate this strategy. The contractor shall follow an Enterprise Program Lifecycle framework applicable for an implementation of this size and complexity (such as a Systems Development Life Cycle (SDLC) tailored for a large Enterprise Program.

The contractor shall perform the tasks and subtasks as defined in Section 1, which shall prepare and then transition GSA and its current customers to the new solution in the five environments. The contractor shall train all employees of GSA and its current customers in its new solutions prior to the final migration. The list of current customers and the number of employees for each system can be found in Section 9 – List of Attachments, Attachment K.

The following sections summarize some of the key functional and nonfunctional requirements. Highlights of GSA's goals and objectives are noted in Exhibit 1.

Exhibit 1. GSA Goals and Objectives



2.2.1 FUNCTIONAL REQUIREMENTS - HR AND T&A

The following sub-sections summarize some of the key functional requirements for HR and T&A. These requirements are to be interpreted in collaboration with the detailed requirements, are defined in attachments to the solicitation, and take precedence over the general descriptions below (Section 9 – List of Attachments, Attachments L, M, O, P, Q, R, S, T). The Attachments contain both requirements that apply to all entities/agencies covered by this procurement and entity-specific requirements. The Attachments clearly note to which entities/agencies the requirements apply. The functional requirements in the Attachments consist of both core and non-core functionality, as defined by OPM's HR LOB Business Reference Model (BRM). The Attachments contain all of the requirements, regardless of designation, in order for GSA to decommission the existing systems that are being replaced by the new contractor solution.

2.2.1.1 PERSONNEL ACTION PROCESSING

OPM Definition: The OPM's Guide to Processing Personnel Actions defines a Personnel Action as "the process necessary to appoint, separate or make other personnel changes." The concept of

personnel action is not specific to a single HR LOB BRM sub-function. Rather, it is a concept converging with multiple activities across the BRM – activities resulting in a change to employee status or other key employee data.

GSA Requirement: The new HR system shall provide a solution that offers the capability to initiate and process a personnel action. The solution shall use automated workflow to route the personnel action through its approval sequence and provide appropriate notifications. It shall seamlessly connect to GSA HR systems and other eGov HR systems.

2.2.1.2 BENEFITS MANAGEMENT

OPM Definition: The HR LOB BRM defines the sub-function Benefits Management as "designs, develops and implements benefit programs to attract, retain and support current and former agency employees. This sub-function includes: establishing and communicating benefits programs, processing benefits actions, and interacting as necessary with third-party benefits providers."

GSA Requirement: The new HR solution shall provide a solution that offers web-based employee self-service capabilities for benefits enrollment. For Government-wide benefits programs, plus selected entity-specific benefits programs, the contractor shall activate benefits enrollments based on predefined business rules and make benefits participation data available to payroll and to benefits providers. The solution shall provide employee access to frequently asked benefit questions and answers that may assist employees during a benefit election period.

2.2.1.3 ORGANIZATION AND POSITION MANAGEMENT

OPM Definition: The HR LOB BRM defines the sub-function Organization and Position Management as "designs, develops and implements organizational and position structures that create a high-performance, competency-driven framework that both advances the agency mission and serves agency human capital needs."

GSA Requirement: The Organization and Position Management sub-function is closely tied to several other sub-functions. Notably, the common job descriptions that result from this sub-function shall be available for use by other BRM sub-functions.

The HR solution shall provide the ability to capture data related to:

a. Standardized skill and competency definitions to the HR Strategy sub-function.
b. Inventories of skills to be embedded in job requirements for the Staff Acquisition sub-function.
c. The competencies and skills that provide a basis for assessing individual performance and identifying individual employee development needs for the Performance Management sub-function.

2.2.1.4 COMPENSATION MANAGEMENT – T&A

OPM Definition: These are scheduling tools that support work schedules and tours of duty, specific employee schedule by time-period, rescheduling, comments, and project labor cost analysis. The solution shall provide a view of scheduled leave across groups of employees and shall identify not-to-exceed exceptions by project, group of employees, or position. The tool shall allow time to be entered electronically (e.g., web-based capability, badge swipes, mobile

devices) and on an exception basis as appropriate. The capability shall exist to associate time, by code or employee, with a project code.

GSA Requirement: The solution shall be a web-based time and overtime entry and approval system that uses electronic workflow to manage the approval process. The solution shall accommodate out-of-office situations, moving the approval through an alternative routing. The solution shall send notifications regarding overdue actions or approvals. It shall make time data available to payroll and the general ledger and provide visibility into time data for employees and managers.

The solution shall facilitate the collection, scheduling, request, and approval of employee leave and attendance. The solution shall be role based, where role definitions can be configured within specific parameters to meet agency business practices and needs and can allow for access at the employee level to input and request time, leave, telework, and schedule changes. Roles shall be defined and limited to view specific assigned employees, agency defined organizations, or a combination of the two.

The solution shall provide a full and complete audit record – date and time stamping – of every action utilized in the application and taken by the end user. In addition, functionality to support Voluntary Leave Transfer Programs is desired. This program lets employees donate annual leave to other employees who are experiencing a medical emergency.

2.2.1.5 COMPENSATION MANAGEMENT – PAYROLL INTERFACE

The HR LOB BRM defines the sub-function Compensation Management as "the adoption of non-discretionary (Government-wide), agency-discretionary and alternative compensation programs that are fair and equitable, and that promote employee retention. Award and bonus payout strategies are devised and administered. Work schedules are established and time worked is recorded and approved. Leave taken is reconciled against leave accrued to determine leave balances. Payroll is processed and reconciled, and employee pay and other third-party disbursements are generated. Labor costs are distributed, as appropriate, to the appropriate cost accounts."

GSA Requirement: GSA currently uses the Payroll Accounting and Reporting (PAR) system for its payroll processing. However, GSA is also considering replacing PAR at a currently undetermined future date. The contractor shall provide interfaces from the new HR and T&A solutions to the payroll system in place at the time of implementation.

2.2.2 OTHER FUNCTIONAL REQUIREMENTS (HR AND T&A)

2.2.2.1 MOBILE ENABLED SOLUTION

The HR and T&A solution shall be mobile enabled and specifically designed and optimized for use on various mobile devices and their respective operating systems, such as tablets and smart phones (Windows, Android, and iOS).

2.2.2.2 SELF-SERVICE CAPABILITIES

GSA would like to enable employees to manage their personnel and payroll information. For example, the solution shall provide access to information related to earnings, taxes, benefits, and

vacation leave balances and allow employees to update information for their tax withholding, direct deposits, and retirement fund allocations.

2.2.2.3 INTEGRATED, CONTEXT-BASED HELP FUNCTIONALITY

To aid in the adoption of self-service functionality, it is important that employees have quick access to content that provides guidance on how to execute a certain function or explain a particular data element. This content shall be available while in the middle of a transaction/function without moving to a separate portion of the system. The help content could be supplemented with content that is more comprehensive in a Knowledge Management capability as described herein.

2.2.2.4 INTEGRATED TRAINING MATERIALS

Users shall have quick access to training material content that provides guidance on how to navigate the system, execute functions, and explain data elements. Users need to refresh the knowledge gained from their initial training class. New employees need a quick way to get up-to-speed on the systems they are expected to use. Training classes may not always be available post-migration so it is important that materials be organized, maintained, and available directly in the system. Training materials shall also be incorporated into a Knowledge Management capability as described below.

2.2.2.5 KNOWLEDGE MANAGEMENT CAPABILITIES

Similar to providing 'Help' and integrated training materials, having access to a broader set of documentation shall aid employees in researching not only how to perform a function in the system (help and training content), but also in locating business process, procedure, and policy-related documentation that they need to perform their jobs. The new solution shall provide a knowledge management repository where agencies can store system specific materials (business process training materials, policies, processes, and procedures, etc.), that supplement the contractor-provided training and help materials.

2.2.2.6 REPORTING, ANALYTICS, AND DASHBOARDS

The contractor shall build out functionality that meets reporting requirements. In addition, the solution shall have ad hoc reporting capabilities with user roles and authorizations that control the levels of report and data access, and reporting functionality, such as the ability to create a report, save as a template, print, download to desktop, export, or view-only.

The contractor shall provide easily configurable dashboards that can graphically represent business metrics and provide business performance measurements, as is common to business intelligence, information technology (IT), and performance management software.

In addition, the contractor shall provide a repository to index and store both production and ad-hoc reports in an organized manner for easy access.

2.2.2.7 SYSTEM INTERFACES AND EXTRACTS

The contractor shall develop, implement, and maintain interfaces and extracts identified and described in interface control and/or design documents provided by GSA (Section 9 – List of Attachments, Attachments O, P, Q, R, S, and T).

2.3 CURRENT IT/NETWORK ENVIRONMENT

The systems described below are the current core systems that shall be replaced by new systems as a result of this acquisition. There are also many ancillary/non-core HR-related systems which are integrated today into the overall HR IT environment, and shall be integrated into the new environment being procured in this solicitation.

2.3.1 CURRENT HR SYSTEM

Today, GSA uses the Comprehensive Human Resources Integrated System (CHRIS) to provide the core HR technology processing activities. CHRIS is based on a COTS product developed by Oracle. GSA purchased the commercial version of the Oracle HR software and in October 1998, purchased the Federal version of the Oracle Federal Human Resources (OFHR) software. OFHR contains the Federal HR functionality and complies with the OPM's Guide to Processing Personnel Actions and the Guide to Personnel Data Standards, as well as other mandated personnel regulations, which change over time. GSA continues to develop customized OFHR functionality to meet GSA and its client agencies' changing business needs and process flow requirements. CHRIS has interfaces to GSA's PAR and supports the hosting of e-Government (eGov) initiatives through direct data feeds to OPM and its service providers. CHRIS interfaces with many other systems to perform the previously described functions.

GSA also provides transactional processing and support from its centers of expertise in personnel action, benefits, and retirement processing, known as the Consolidated Processing Center (CPC) as well as other functional support teams. The CPC offers GSA and its small client agencies a full range of systems and support services for transactional processing, benefits management, worker's compensation, maintenance of Official Personnel Folders (OPFs), and retirement services and retirement counseling. The CPC provides nationwide support and is co-located with GSA's Payroll Services Branch (PSB) for quick reconciliation of incidents. The CPC offers a benefits helpdesk available during business hours via phone or email, which is staffed by experienced retirement and benefits specialists.

2.3.1.1 CURRENT PAYROLL SYSTEM

GSA's current PAR system captures, validates, and processes payroll and disbursement data for a given pay period by gathering data on employee time worked and leave taken, calculating gross pay, and processing deductions and taxes to calculate net pay. Interfaces between the Payroll, HR and T&A systems are real-time.

The PAR System was designed, developed, and is maintained by GSA and has been operational since 1995. The system provides a web-based interface for GSA's PSB personnel to update and maintain payroll accounts. Security is controlled by the PSB team and is sufficiently flexible to support all business processes. The system is table-driven to facilitate real-time data updates and maintenance. PAR is accessible via Oracle Forms launched from a web browser.

2.3.2 CURRENT T&A SYSTEM

GSA currently uses the Electronic Time and Attendance System (ETAMS), a GSA-developed T&A system. Employees input T&A data into ETAMS, and ETAMS then submits the data to PAR electronically. GSA performs the necessary operational reviews of the employee pay and leave information for the current pay period and initiates the final payroll calculation process for

that pay period. The new T&A system shall be able to electronically send and receive information on a real-time basis with GSA's payroll and new HR system and provide robust data edit checking before committing incoming data to the T&A databases.

In addition to requiring a new T&A system, GSA requires functionality similar to its Authorized Leave and Overtime Help Application (ALOHA). ALOHA allows an automated way of capturing leave request and overtime request information without having to save email records or paper forms and have the information stored to meet data retention of such requests in accordance with T&A regulations. The new HR and T&A system shall seamlessly provide this functionality so that ALOHA can be decommissioned.

2.4 OBJECTIVE

The objective of this TO is to provide managed services that support GSA core HR and T&A business functions. The solutions shall provide self-service capabilities supported by widespread, integrated help and knowledge management functionality.

2.5 TASKS

a. Task 1 – Provide Program Management
b. Task 2 – Conduct Fit/Gap Analysis, Execute a Proof of Concept and Begin BPR Planning
c. Task 3 – Establish and Manage a Pre-Migration Hosting Environment
d. Task 4 – Pre-Migration Preparation of Systems
e. Task 5 – Prepare and Deliver Training
f. Task 6 – Migrate, Support, and Stabilize Systems
g. Task 7 – Provide Managed Service Support
h. Task 8 – Provide Security Management
i. Task 9 – Enhancements, Future System Functionality, and Other Services

2.5.1 TASK 1 – PROVIDE PROGRAM MANAGEMENT

The contractor shall provide program management support. This includes the management and oversight of all activities performed by contractor personnel, including subcontractors, to satisfy the requirements identified in this Performance Work Statement (PWS). This also includes program management, schedule management, quality management, change management, communications, and risk and issue management. The contractor shall identify a Program Manager (PM) by name who shall provide management, direction, administration, quality control, and leadership of the execution.

2.5.1.1 SUBTASK 1 – COORDINATE A PROJECT KICK-OFF MEETING

The contractor shall schedule and coordinate a Project Kick-Off Meeting at the location approved by the Government. The meeting shall provide an introduction between the contractor personnel and Government personnel who will be involved with the TO. The meeting shall provide the opportunity to discuss technical, management, and security issues, and travel authorization and reporting procedures. At a minimum, the attendees shall include Key contractor Personnel, representatives from the directorates, other relevant Government personnel, and the FEDSIM COR. The contractor shall provide the following at the Kick-Off Meeting:

a. Draft Project Management Plan (PMP)
b. Final Quality Control Plan (QCP)
c. Spend Plan Draft, which shall include, at a minimum, estimates of planned expenditures for the base year by month.

2.5.1.2 SUBTASK 2 – PREPARE A MONTHLY STATUS REPORT (MSR)

The contractor PM shall develop and provide a Monthly Status Report (MSR) (Section 9 - List of Attachments, Attachment C) using Microsoft (MS) Office Suite applications via email to the Technical Point of Contact (TPOC) and the FEDSIM COR. The MSR shall include the following:

a. Activities during reporting period, by task (include on-going activities, new activities, and activities completed, and progress to date on all above mentioned activities). Each section shall start with a brief description of the task.
b. Problems and corrective actions taken. Also include issues or concerns and proposed resolutions to address them.
c. Personnel gains, losses, and status (security clearance, etc.).
d. Government actions required.
e. Schedule (show major tasks, milestones, and deliverables; planned and actual start and completion dates for each).
f. Summary of trips taken, conferences attended, etc. (attach trip reports to this MSR for reporting period).
g. Accumulated invoiced cost for each CLIN up to the previous month.
h. Projected cost of each CLIN for the current month.
i. Contractor risks and issues related to managing the contract.

2.5.1.3 SUBTASK 3 – CONVENE TECHNICAL STATUS MEETINGS

The contractor PM shall convene weekly Technical Status Meetings with the Government stakeholders. The purpose of this weekly status meeting is to ensure all stakeholders are informed of the project status. The contractor shall provide a Weekly Status Report that includes at minimum:

a. Project Status
b. Schedule changes
c. Key weekly activities
d. Issues and Risks
e. Other pertinent information

2.5.1.4 SUBTASK 4 – PREPARE A PROJECT MANAGEMENT PLAN (PMP)

The contractor shall develop, deliver and update, a PMP that lays out its approach, timeline, and tools to be used in execution of the contract. The PMP shall provide the foundational definitions for managing the program and shall include and reference several other plans, including a Communications Plan, Staffing Management Plan, Risk Management Plan and Issue/Risk Log,

QCP, resource-loaded Integrated Master Schedule (IMS), and Change Management Plan. The plans shall take the form of both a narrative and graphic format that displays the schedule, milestones, risks, and resource support. The PMP shall also include how the contractor shall coordinate and execute planned, routine, and ad hoc data collection reporting requirements, including those required by the contractual deliverables. Where applicable, these plans shall reference similar plans as developed by the entity. The initial baseline PMP shall be concurred upon by the FEDSIM COR and TPOC. Weekly updates of some PMP sections may be required by the Government.

The IMS shall include, when applicable, the deployment/cutover tasks and schedule.

2.5.1.4.1 PREPARE A COMMUNICATIONS PLAN

The contractor shall prepare a Communications Plan that describes in detail the modes, methods, and messages provided to keep entity stakeholders informed of the program's progress. This plan shall identify, at a minimum, individuals or groups, the mode of communication used with each group, the nature of the message (summary and detail), and the frequency and timing of the communication. The contractor shall update the plan upon changes to stakeholder groups or communications needs. The contractor shall prepare communications content and/or materials as defined in the Communications Plan.

In addition, the contractor shall prepare a Migration Communications Plan that addresses the means of communicating specific migration related activities to individual entities.

2.5.1.4.2 STAFFING MANAGEMENT PLAN

The Staffing Management Plan shall include project roles, responsibilities, and reporting relationships in both a table format as well as in an organizational chart. The Staffing Management Plan shall also identify resources utilized throughout the project life cycle. A Responsible, Accountable, Consulted, Informed (RACI) matrix identifying the Key Personnel shall also be included in the plan.

2.5.1.4.3 RISK MANAGEMENT PLAN AND ISSUE/RISK LOG

The contractor shall establish and maintain a Risk Management Plan and a comprehensive Issue/Risk Log to track risks and assign mitigation strategies. Risks are potential future events that, if they occur, would have an impact on the project, or the successful operation of the system, whereas issues are events that have occurred and must be resolved as soon as possible. The contractor shall perform an initial risk assessment jointly with the entities, identifying and assessing the probability and impact severity of all foreseeable programmatic and technical risks, and develop mitigation strategies for high and medium exposure risks.

The Risk Management Plan shall include how risks will be identified, managed, and mitigated. The responsibilities for monitoring and review shall be clearly defined. The monitoring and review processes shall encompass, when applicable, all aspects of the risk management process for the purposes of:

a. Ensuring that controls are effective and efficient in both design and operation.
b. Obtaining further information to improve risk assessment.

c. Analyzing and learning lessons from risk events, including near-misses, changes, trends, successes and failures.
d. Detecting changes in the external and internal context, including changes to risk criteria and to the risks, which may require revision of risk treatments and priorities.
e. Identifying emerging risks.

The plan shall also include a template of the Risk Log that shall be used to track issues and risks and assign mitigation strategies to address each one. The contractor shall maintain the Issue/Risk Log and update it as needed. The Issue/Risk Log is an ongoing tool for the purposes of identifying, triaging, and managing risks. The Risk Log needs to be available, visible, and monitored at least weekly.

The contractor shall maintain and update the Risk Management Plan on an ongoing basis and conduct risk reviews at least bi-weekly during a program and during FFP tasks. The contractor shall assess and mitigate risks as mandated by the National Institute of Standards and Technology (NIST) 800-53 Revision 4, NIST 800-30, and subsequent updates.

When applicable, the contractor shall prepare a Risk Review Report that describes risks to the system and ongoing operations including near-misses, changes, trends, and emerging risks in addition to mitigation strategies and lessons learned from risk events. The report shall also include risk reduction recommendations.

2.5.1.4.4 QUALITY CONTROL PLAN (QCP)

The Government will provide the contractor with a Quality Assurance Surveillance Plan (QASP) that will be used to monitor contractor performance. The contractor shall develop and maintain a QCP that aligns to the QASP and includes performance measures defining the performance targets and metrics necessary to provide the Government with quantitative data to assess the quality of the contractor's performance.

In addition, the QCP shall discuss how the contractor shall improve and maintain quality; specifically, its:

a. Approach to planning, organizing, and managing internal resources and subcontractors, to include lines of authority.
b. Rationale for tracking and reporting progress and costs and integrating the requirements of the TO.
c. Approach to ensure that cost, performance, and schedule comply with task planning.
d. Approach to identification of and resolution of issues and problems, including escalation of procedures.
e. Approach for continuous improvement of processes and procedures used in this task.
f. Rationale for specifically assigning subcontractor responsibilities, functions, and work apportionment.

2.5.1.4.5 INTEGRATED MASTER SCHEDULE (IMS)

The Integrated Master Schedule shall include a decomposition of the major phases of a project into manageable activities and work items and facilitate the assignment of responsibilities and schedule dates to the work items. The IMS should be resource loaded and tasks should be

scheduled according to a timeline agreed upon by the Government. The IMS should include interdependencies across tasks and be able to identify critical paths. Key milestones should be identified for reporting purposes. Key tasks and milestones from projects outside of the one for which the IMS is prepared, that are major interdependencies with the project, should be incorporated and tracked with input from the Government to understand any potential impact on the project. The IMS shall include a WBS at a level of detail sufficient for it to manage work and disclose project effort and progress to the Government for each task. At a minimum the WBS shall be at level 3.

2.5.1.4.6 CHANGE MANAGEMENT PLAN

The contractor shall provide a Change Management Plan. The plan shall define activities and roles to manage and control change during all phases of the project. This shall include changes to project scope, budget, schedule, and plans to manage quality, risk, issues, and change.

2.5.1.5 SUBTASK 5 – DASHBOARDS

The contractor shall develop and maintain dashboards to monitor and report performance targets and metrics of the project and systems implemented during the project. The dashboards shall allow entities to monitor the progress and quality of delivery towards specified outcomes and project benchmarks. The contractor shall develop two types of dashboards: 1) System Performance metrics as defined by an entity and the contractor, and 2) Project Performance metrics.

2.5.1.6 SUBTASK 6 – PREPARE TRIP REPORTS

The Government will identify the need for a Trip Report when the request for travel is submitted. The contractor shall keep a summary of all long-distance travel including the name of the employee, location of travel, duration of trip, and Point of Contact (POC) at travel location.

2.5.1.7 SUBTASK 7 – TRANSITION OUT

The Transition-Out Plan shall facilitate accomplishing a seamless transition from the incumbent to an incoming contractor/Government personnel at the expiration of the TO. The contractor shall provide a Transition-Out Plan No Later Than (NLT) 90 days prior to expiration of the Base Period of Performance (POP) (Section 5 – Deliverables or Performance, Deliverable Table). The contractor shall update the Transition Plan 30 days prior to the end of each exercised option period (Section 5 – Deliverables or Performance, Deliverable Table).

The contractor shall identify how it shall coordinate with the incoming contractor and/or Government personnel to transfer knowledge regarding the following:

a. Project management processes
b. Points of contact
c. Location of technical and project management documentation
d. Status of ongoing technical initiatives
e. Appropriate contractor–to-contractor coordination to ensure a seamless transition
f. Transition of Key Personnel knowledge
g. Schedules and milestones

h. Actions required of the Government

The contractor shall also establish and maintain effective communication with the incoming contractor/Government personnel for the period of the transition via weekly status meetings.

2.5.2 TASK 2 – CONDUCT FIT GAP ANALYSIS, EXECUTE A PROOF OF CONCEPT, AND BEGIN BPR PLANNING

The contractor shall establish and provide an environment and configure the application software as needed to perform a fit/gap analysis for each system (HR and T&A). The contractor shall continue to configure the systems with the business rules identified during fit/gap in order to specify that the each of the systems meet the functional requirements established by the Government for the five entities identified (GSA with CABS, OPM, USIP, RRB, and NCUA). The contractor shall set up the environment in the manner it deems appropriate for the scope of this Task and is not required to establish five environments at this time.

The contractor shall present the results of the fit/gap analysis and produce a final Migration Plan and Schedule based on information learned during this phase. For this Task, if interfaces already exist between the systems and are available at no cost to the Government, they can be implemented to further support the configured system capabilities. At the end of Task 2, the contractor shall update the project management deliverables and IMS based on what was discovered during this Task, including determining key migration milestones for each of the five entities.

2.5.2.1 SUBTASK 1 – ESTABLISH A FIT/GAP AND PROOF OF CONCEPT ENVIRONMENT

The contractor shall install, configure, and operate the necessary hardware, software, and any other items to establish a hosting environment and services required to perform hosting-related services in a contractor-provided facility for the scope of Task 2. This includes applicable application software licenses from third parties and managing the hosting environment during Task 2. If interfaces already exist between the systems and are available at no cost to the Government, they can be implemented to further support the configured system capabilities.

2.5.2.2 SUBTASK 2 – CONDUCT FIT/GAP ANALYSIS

The contractor shall review each identified entity's system requirements and perform a fit/gap analysis against its proposed solution. The fit/gap analysis shall include proof of concept sessions to review the out-of-the-box solution against requirements and business processes and identify the fits and gaps. The contractor shall review the results of the fit/gap analysis to assess the level of effort required to meet the gaps and shall support and generate all activities necessary to conduct the fit/gap analysis for the system, including:

a. Review of functional and other requirements.
b. Identification of potential business process impact areas.
c. Conducting proof of concept sessions and demonstrating the new system capabilities and workflow.
d. Creating fit/gap analysis and comparison reports.

e. Developing the level of effort to configure and enhance (if required through an extension) the system.

The Fit/Gap Analysis Report shall include an executive summary with detailed findings and recommendations. The report shall also include the following elements:

a. Requirements review results (identifying the fits and gaps).
b. Business processes that are impacted and flagged to be part of the BPR activities.
c. Primary users and/or functional groups impacted by the gap.
d. Functional and technical gaps and a proposal for how the contractor can fill the gap (such as through an extension).

The contractor shall deploy, to the extent practicable, configured COTS products without customization of the COTS code. If, during the fit/gap analysis, it is determined that a COTS software product cannot be configured to meet certain entity-specific mandatory requirements, the contractor shall provide a plan to scope, design, develop, test, and implement extensions to the COTS product to accommodate the entity-specific mandatory functionality. These extensions shall reside outside of the COTS product and shall not interfere with or increase the difficulty of implementing future releases, upgrades, and/or patches to the COTS product.

2.5.2.3 SUBTASK 3 – CREATE AND DEMONSTRATE PROOFS OF CONCEPT

The contractor shall configure the systems with the business rules identified during fit/gap analysis in order to demonstrate that each of the systems meet the functional requirements established by the Government for the five entities identified (GSA with CABs, OPM, USIP, RRB, and NCUA). The contractor shall demonstrate configured systems in a proof of concept environment at the appropriate time during fit/gap analysis with participants and conduct a comprehensive demonstration shortly after the end of fit/gap analysis. The final proof of concept demonstration should include a presentation of the plan to scope, design, develop, test and implement each potential extension to the COTS product to accommodate the entity-specific, mandatory functionality identified during fit/gap analysis. Cost estimates shall be provided for each extension to assist the Government in evaluating each potential extension

2.5.2.4 SUBTASK 4 – PLAN FOR BUSINESS PROCESS REALIGNMENT (BPR)

The contractor shall develop a detailed BPR Plan and Schedule for executing the Phase 2 BPR subtask. Information gathered during the fit/gap analysis activities should assist in determining the extent of BPR activities in Phase 2 as well as identifying GSA and other entity stakeholders and participants needed for BPR activities. The BPR Plan and Schedule shall include meetings and working sessions identified in the schedule for the first month of the Phase 2 BPR subtask and shall be scheduled on participant calendars to ensure a quick and smooth transition into Phase 2 for BPR related activities. Materials to support BPR meetings/working sessions shall also be prepared and distributed as appropriate.

2.5.2.5 SUBTASK 5 – PREPARE AN INITIAL MIGRATION PLAN AND SCHEDULE

The contractor shall prepare an initial version of the Migration Plan and Schedule to rollout the new solutions to each entity and its end users. This Migration Plan and Schedule shall

communicate how and when the system and contractor supporting processes (such as the contractor help desk, incident management, and change management functions), where applicable, shall be deployed, installed, and/or transitioned into operation. The purpose of this Migration Plan and Schedule is to ensure all entity stakeholders are aware of the details, requirements, and responsibilities involved in successfully completing this project and migrating the product to the Government's end-users.

The Initial Migration Plan and Schedule shall provide detailed recommendations for key activities and tasks and associated timelines for both the contractor and each entity to execute the deployment of the new solutions to the entity. The plan shall include the following elements:

a. All Key Phase 2 Task and Subtask activities.
b. Recommended resource requirements for both the contractor and the relevant entity.
c. Migration Plan and Schedule aligned with the IMS.

2.5.3 TASK 3 - ESTABLISH AND MANAGE A PRE-MIGRATION HOSTING ENVIRONMENT

The contractor shall install, configure, and operate the necessary hardware, software, and any other items to establish the hosting environments and services required to perform hosting-related services in a contractor-provided facility to support the five entities. This includes purchasing and installing applicable application software licenses from third parties and managing the hosting environments during implementation and migration periods.

2.5.3.1 SUBTASK 1 – ESTABLISH AND OPERATE FACILITIES, HARDWARE, INFRASTRUCTURE, AND SOFTWARE

The contractor shall establish and operate the facilities, hardware, infrastructure, and software necessary to host and support the systems. The contractor shall maintain these environments, administering appropriate patches and upgrades to ensure high-performance service delivery to the Government consistent with industry standards and best practices.

The contractor shall provide a Hosting Setup Plan that includes the following elements:

a. Processes to define and report performance measures, metrics, and status updates on the facilities, hardware, infrastructure, and software supporting the systems to be used to track progress during a program.
b. Processes to perform configuration management activities, including identifying, recording, and reporting on infrastructure components (hardware, software, and associated documentation).
c. Processes to determine performance of the applications in the development, testing, training, and any other environments except for planned maintenance periods.
d. Processes to record events that occur during the backup process.
e. Processes to perform maintenance updates including, infrastructure releases, and hardware upgrades.

The contractor shall provide a Hosting Setup Report, which shall include the architecture, hardware information, software installed and purpose, operating system (OS) security controls, and the application/database security controls implemented.

The contractor shall provide a Performance Report that includes capacity, performance, availability, problem trends, and hardware, software, and facilities status.

2.5.3.2 SUBTASK 2 – INSTALL AND CONFIGURE APPLICATION / SYSTEM

The contractor shall install and technically configure systems into the hosting and infrastructure environment, preparing it for use by the Government during all phases of a project.

2.5.3.3 SUBTASK 3 – MANAGE HOSTING CONFIGURATIONS

The contractor shall perform configuration management activities, including identifying, recording, and reporting on infrastructure components (hardware, software, and associated documentation) associated with each software configuration.

2.5.3.4 SUBTASK 4 – MAINTAIN HOSTING ENVIRONMENT AVAILABILITY

The contractor shall ensure ongoing availability of any systems/applications in the hosted development, testing, and training environments, and any other environment except for planned maintenance periods. The contractor shall provide standard maintenance periods for applying infrastructure releases, including hardware upgrades.

2.5.3.5 SUBTASK 5 – PERFORM SOFTWARE AND DATA BACKUPS

The contractor shall conduct system backups to ensure that data and transactions would not be lost during an event.

2.5.3.6 SUBTASK 6 – SUPPORT PENETRATION TESTING

The contractor shall allow the Government to perform penetration testing of the systems in the hosted environment throughout the TO's POP and provide any access necessary to Government personnel or other third-party personnel as authorized by the Government.

2.5.3.7 SUBTASK 7 – IMPLEMENT INITIAL HELP DESK SERVICES

At an appropriate time during a system implementation or migration project, the contractor shall establish help desk services and publish processes to relevant project participants to facilitate the resolution of technical issues that could be encountered during business configuration, training, testing, and any other activity requiring system access by the Government end-users.

2.5.3.8 SUBTASK 8 – MAINTAIN SYSTEM DOCUMENTATION

The contractor shall develop and update documentation on system technical environments for all instances within two weeks of a change. The contractor shall make this System Documentation Technical Manual documentation available and easily accessible to the Government in an electronic format.

The contractor shall provide a technical manual that contains documentation on the system environments.

2.5.4 TASK 4 – PRE-MIGRATION PREPARATION OF SYSTEMS

The contractor shall perform business analysis, requirements analysis, fit/gap analysis and requirements validation, business process realignment, software package design and

configuration, required interfaces and extensions development, and solutions testing in preparation for migration and rollout. This includes performing any other related technical or integration work.

2.5.4.1 SUBTASK 1 – CONDUCT BUSINESS PROCESS REALIGNMENT (BPR)

The contractor shall conduct an analysis of the Government user functions and processes and work with the Government to identify any potential changes to current business processes and activities that are driven by how the new solutions operate. The contractor shall update the BPR Plan and Schedule as needed during this subtask. The contractor shall work with appropriate Government subject matter experts and/or owners of business processes to discuss how the system operates and provide the necessary system documentation, including business Functional Process Documentation that depicts how the new system performs each function. This will ensure the Government has a basis for updating its processes and assigning roles and responsibilities. The contractor shall produce a BPR Report that summarizes all of the areas within an entity that needs to update its processes, procedures, and other documentation to align to how the new system operates.

2.5.4.2 SUBTASK 2 – PREPARE DATA CLEANUP, DATA CONVERSION, AND DATA MIGRATION PLANS

The contractor shall prepare and deliver a detailed Data Migration plan that addresses its approach for data cleanup, data conversion, and data migration for each entity migrating to a new system, as the contractor shall be responsible for the final conversion and data migration that meets entity requirements. The plan shall include how the contractor will identify and establish all appropriate system setup and configuration tables in preparation for data conversion and migration.

Data from the current systems that is needed to set up and initially populate the systems shall be converted; however, historical transactional data shall not be converted.

The Data Conversion Plan shall include the overall approach, assumptions, tools, and processes that shall be used in the data conversion. It shall include an inventory and cross-reference of source and target data elements, schema, metadata, and all self-describing files; process for data extraction, transformation, and loading for each data source; tools needed to execute the conversion; and strategy for data quality assurance and control.

The Data Conversion and Migration Report shall include analysis and tracking of data conversion and migration results at summary and detailed levels.

2.5.4.3 SUBTASK 3 – FINALIZE THE GOVERNMENT MIGRATION/DEPLOYMENT PLAN

The contractor shall finalize the detailed Migration/Deployment Plan to rollout the new systems to each entity and its end users. This plan shall communicate how and when the system and contractor supporting processes (such as the contractor help desk, incident management, and change management functions), where applicable, shall be deployed, installed, and/or transitioned into operation. The purpose of this plan is to ensure all stakeholders are aware of the details, requirements, and responsibilities involved in successfully completing this project and migrating the product to the Government's end-users.

The Migration Plan shall provide detailed recommendations for all work steps to execute the deployment of a new system to the entity. At a minimum, the plan shall include the following elements:

a. Pre-deployment preparation period activities.
b. Resource requirements for both the contractor and the relevant entity.
c. Deployment timeline for the deployment cutover days.
d. Communication plans for deployment cutover days and post-cutover.
e. Escalation procedures for deployment cutover days.
f. System documentation for all resources involved.
g. Post-deployment review processes.
h. Processes to capture, record, and implement lessons learned.

The detailed migration and deployment/cutover schedule shall include a timeline of the activities to migrate an entity from the current system to the new system. Details on the data clean up approach, data conversion approach, new environment setup, and migration of configurations shall be included.

The Post-Deployment Review Report shall contain assessment information on each deployment including:

a. Summary assessment of deployment activities.
b. Evaluation of the effectiveness of the deployment.
c. Government feedback.

The Lessons Learned Report shall include lessons learned recorded from each deployment and recommendations for future deployments.

2.5.4.4 SUBTASK 4 – DESIGN THE SOLUTION

The contractor shall prepare a design for the new system, enhancements, and related system components that are in scope for a project. The design shall include a detailed description of the solution approach to meeting entity requirements. The design shall address technical and business configuration design, where applicable, of COTS products, interfaces, extracts, extensions, and data conversions.

During the design of ongoing interfaces and data extracts, the contractor shall work with each entity to determine existing applications and strategize on the architectural design of the new interfaces and extracts to ensure compatibility with systems being interfaced. The contractor shall attend technical working group meetings and conference calls as needed with system owners to design interfaces to meet requirements.

For designing any configuration aspects and reports, the contractor may be required to work with appropriate Government-designated subject matter experts to gather the information necessary to prepare the design.

For designing data conversion routines, the Government will make a team of subject matter experts available to the contractor to explain existing data schemas.

The contractor shall design extensions needed to provide functionality required by the Government that are not supported by the COTS software product. For example, during the fit/gap analysis or through other mechanisms if it is determined that the system cannot be configured to meet certain entity specific mandatory requirements, the contractor shall scope and design, and later develop, extensions to the COTS product to accommodate the entity-specific mandatory functionality. These extensions shall reside outside of the COTS product and shall not interfere with the on-going COTS upgrades.

For designing/defining the business rules/configuration rules, the contractor shall work with the Government to determine and document all required rule-allowed values in preparation for future configuration activities.

Upon completion of each design, the contractor shall conduct a design review with each entity. The design review shall indicate the completeness of the designs and how they meet specified requirements.

The contractor shall prepare and deliver a System Design Document (SDD) which details system specifications where applicable, based on the scope of a project. The SDD shall include the following:

a. System architecture, to include at a minimum, data flow and system interconnection diagrams.
b. File and database design.
c. User interface designs.
d. Interface designs and interface control document.
e. Report designs.
f. Any other technical design components.
g. Design completion checklist.

The Interface Control Documents shall include the following elements:

a. Data elements required in the interface and/or extract.
b. Detailed interface requirements.
c. Interface processing time requirements.
d. Definition of the message structure and protocols that govern the interchange of data.
e. The communication paths along which the data are expected to flow.
f. The frequency and timing of the interface or extract.
g. Interdependencies with other automated processes for the system.
h. All other data necessary to manage and control the interface.

The contractor shall create a Requirements Traceability Matrix (RTM) to map each functional requirement to the application sections of the design and maintain the RTM throughout all phases of the project to ensure traceability all the way through testing.

The contractor shall participate in Design Review Sessions to determine completeness of the designs and how well the designed solution meets the specified requirements.

As a part of Design Review, the contractor shall include the following (where applicable based on the scope of the project):

a. The Product Architecture Document: Detailed and easily accessible in order to present the project to any stakeholders or developers in a way that they can easily understand the architecture of the project.
b. The Functional Flow Document: Detailed step-by-step diagram of the system's functional flow.
c. The Hardware Architecture Document: Detail of the software and server configurations of the system.
d. The Topological Architecture Diagram: A schematic that diagrams the connections among nodes in the telecommunications network and any other network-related components of the system and its overall environment.
e. The Node Connectivity Diagram: Detail of the connections between business locations (nodes) as well as the information being exchanged.

The contractor shall maintain a Version Description Document that contains a summary of the features and contents of the software for each environment in which it is configured (test, training, pre-production, production, etc.). It must be used to track and control different versions of software to be released to each of the operational environments.

The contractor shall deliver Configuration Files with detailed system configuration and parameters. The contractor shall also deliver a System Architecture Document that provides a comprehensive architectural overview of the system, system components, and the relationships between them to assist the entity in understanding and documenting interrelationships between the contractor solution and other internal and external systems.

2.5.4.5 SUBTASK 5 – MANAGE SYSTEM CONFIGURATION CHANGES

At a point in time during the pre-migration preparation of systems, the contractor shall lock down the applicable system software and manage all changes to it in a controlled manner. When this occurs, the contractor shall follow a formal process, as defined in a System Change Control Plan, to introduce on-going system configuration and in-scope changes to the system. This includes understanding Government priorities and controlling how changes are introduced into the system(s) in a coordinated manner.

2.5.4.5.1 SYSTEM CONFIGURATION

The contractor shall manage the necessary COTS configuration changes, such as updating pay plans to allow for modifications from OPM that occur during the program. For configuration changes, the contractor shall develop a process that defines who approves the change and who implements the change (contractor or Government). Decisions must be made on whether extensive change control process, which may require approvals and testing, shall be followed, or whether abbreviated processes can be adopted for some changes.

The contractor shall prepare and deliver a Configuration Management Plan that includes configuration management responsibilities of the entity and includes the processes for how the entity will maintain and verify the completeness and correctness of configuration items throughout the project lifecycle.

The contractor shall prepare and deliver a Security Configuration Checklist, which contains verification that the system has been configured properly, and adheres to the required security standards.

2.5.4.5.2 CHANGE CONTROL MANAGEMENT

The contractor shall develop a System Configuration and Change Control Governance Plan that defines, during a migration, the contractor's governance approach and structure (as a Shared Services Provider), identifies stakeholders, and defines roles and responsibilities of the contractor and entities governing the five new environments and the specific processes that align to the approach.

The contractor shall develop change control processes and procedures that define how it shall manage in-scope change requests during an implementation/migration project. In-scope change requests include defect fixes, in-scope changes resulting from fit/gap analysis, testing or training activities, and approved and funded external requests that cannot be deferred until after cutover. The change control process and procedures include:

a. How users/organizations request changes.
b. How the governing bodies review, approve, and prioritize changes.
c. How change control activities are coordinated with software configuration management activities.
d. How change control activities are communicated to stakeholders.
e. How tested and released.

2.5.4.6 SUBTASK 6 – CONFIGURE BUSINESS RULES IN THE SYSTEM

The contractor shall complete the configurations necessary to incorporate the Government's business rules, workflows, best practices, and standard procedures as defined in the requirements.

2.5.4.7 SUBTASK 7 – DEVELOP REPORTS

The contractor shall develop custom reports as defined by the Government. Reports include queries, charts, graphs, and dashboards.

2.5.4.8 SUBTASK 8 – DEVELOP DATA CONVERSION PROGRAMS

The contractor shall develop the data conversion routines necessary to transform and convert Government data into the new database schemas as defined in the new system.

2.5.4.9 SUBTASK 9 – DEVELOP INTERFACES AND EXTRACTS

The contractor shall develop interfaces and extracts as defined by the Government in order to facilitate integration with other systems. The other systems could include ones already hosted by the contractor, hosted by the Government, or hosted by a third party. The contractor shall develop the interfaces according to agreed-upon design specifications.

2.5.4.10 SUBTASK 10 – DEVELOP EXTENSIONS

The contractor shall develop approved extensions necessary to accommodate functionality required by the Government that is not supported by the COTS software product. These extensions shall reside outside of the COTS product and shall not interfere with or significantly increase the level of effort to upgrade the COTS software as needed to support new releases and patches.

2.5.4.11 SUBTASK 11 – TEST THE SYSTEM

There are various activities to support that the new system meets the Government's functional and technical requirements and processes and calculates data in the same manner as the Government's relevant current system (if applicable) or as defined by test cases. Testing shall ensure all components of the systems are working properly.

2.5.4.11.1 PREPARE A TEST PLAN

The contractor shall prepare a comprehensive test plan that includes the testing of both technical and business configurations, extensions, interfaces, data conversion routines, reports, and any and all other testable components. The test plan shall encompass, when applicable for the project, the following testing types:

a. Unit testing
b. System testing
c. Integration testing
d. Interface testing with internal and external entities/environments
e. Regression testing (End to end testing)
f. User acceptance testing

The test plan shall incorporate the broader view of how testing shall occur, the tools being used to manage test scenarios, test cases, test scripts, and test results. The Test Plan shall also describe how defects shall be tracked and reported and the process for integrating defect repair with configuration and release management processes and plans. The test plan shall also account for how test cases shall be traced back to the RTM.

2.5.4.11.2 DEVELOP TEST SCENARIOS, TEST SCRIPTS, AND TEST CASES

The contractor shall create test scenarios, test scripts, test cases, and obtain Government input and approval on the initial draft test scenarios and scripts as well as the final completed test scenarios and scripts. Test scripts shall include each element to be tested with mapping to the Government requirements, as well as a pass/fail indication. The contractor shall maintain a separate, fully configured test system to which specified Government personnel would have access.

The testing phase incorporates one or more test readiness checkpoints. Test readiness assesses the completeness of the configured software, developed interfaces and extensions, and testing materials. The contractor shall conduct a test readiness review after development and test preparation is complete. The test readiness review shall occur at an agreed upon number of days prior to the commencement of text execution. The contractor shall collaborate with the

Government to identify critical areas to develop go/no-go decision criteria and complete a Test Readiness Go/No-Go Form.

2.5.4.11.3 EXECUTE TESTING

The contractor shall execute tests according to the agreed upon test plan, including testing of both technical and business configurations, extensions, interfaces, data conversion routines, reports and any and all other testable components within the scope of the project. The contractor shall execute testing, using a suite of automated test tools and track defects in an automated tool. Testing shall encompass, when applicable, the following testing types, be conducted in corresponding test environments established to control testing, and allow the promotion from one environment to the next upon successfully exiting the previous testing stage:

a. Unit testing
b. System testing
c. Integration testing
d. Interface testing with internal and external entities/environments
e. Regression testing (end to end testing)
f. User acceptance testing
g. Parallel testing (when applicable)

The contractor shall prepare and deliver a Test Report detailing information on the testing processes including the test execution and results and plans for addressing defects.

2.5.4.11.4 ESTABLISH A REQUIREMENTS AND TESTING REPOSITORY

The contractor shall establish and maintain an automated repository(s) of requirements, test scenarios, test cases, test scripts, and other relevant information, using requirements initially provided by the Government and updated over the course of a project, to enable:

a. Traceability of requirements to test scenarios, test cases, and test scripts along with the origin of requirements.
b. Tracking defects identified during testing and their ultimate resolution.
c. Leveraging of previous test scenarios and test cases during future testing cycles involving the system.

2.5.4.11.5 CONDUCT OPERATIONAL READINESS DUE DILIGENCE

Operational Readiness services describe the parameters that govern how a new system shall be configured and deployed to operations, as well as how the contractor shall manage ongoing services. It also includes defining the process and stakeholders that will sign off on the operational readiness.

The contractor shall create an Operational Readiness Checklist or utilize a checklist provided by an entity to manage the status of readiness activities and report to stakeholders on the status of readiness and activities required to achieve readiness.

The contractor shall provide an Operational Readiness Technical Manual that contains detailed instructions for the operation, installation, maintenance, and general use of the system. The Technical Manual shall clearly describe the system that shall be operating in the production

environment and provide the operations and support staff (both contractor and entity staff as required) with the information necessary to effectively handle routine production processing, ongoing maintenance, and identified problems, issues, and/or change requests.

The contractor shall provide a Systems Management Guide that contains information on the interactions between the components that are part of the system's architecture.

The contractor shall provide an Incident Response Plan that describes the organized approach to addressing and managing the aftermath of a security breach, attack, or an incident in a manner limits damage and reduces recovery time and costs.

2.5.4.12 SUBTASK 12 – PREPARE A DEPLOYMENT AND CUTOVER ACCEPTANCE PLAN

The contractor shall develop a Deployment and Cutover Acceptance Plan that identifies the criteria the new systems and operational environment must meet prior to full deployment and the processes that describe how acceptance shall be obtained. At a minimum, the criteria shall indicate the system is functioning as designed and meets the specified requirements, users are trained, production environments are in place, and managed service solution processes and procedures are established and in place. The plan shall also identify the stakeholders from each entity that will be required to sign-off that all criteria have been met, prior to the actual deployment (go/no decision).

The Deployment and Cutover Acceptance Plan shall contain a Deployment and Cutover Acceptance checklist that identifies the criteria that the entity organization and new operational environment must meet prior to full migration and cutover. At a minimum, these criteria shall indicate the following:

a. System is functioning as designed and meets the specified requirements.
b. End users have received training.
c. Production environments are in place.
d. Managed service processes and procedures are established and in place.
e. Contractor help desk is operational and staffed to support the cutover and ongoing operations.
f. The Operational Readiness Checklist items are completed or mitigation approaches are agreed upon by the contractor and entity.

The Deployment and Cutover Acceptance Checklist will be used prior to deployment to assist in making a go/no go decision.

2.5.4.13 SUBTASK 13 – PREPARE A CONTINUITY OF OPERATIONS AND CONTINGENCY PLAN (COOP)

The contractor shall prepare the initial Continuity of Operations and Contingency Plan (COOP) that complies with guidance contained in Federal Preparedness Circular 65 (FPC-65) and any subsequent updates for providing continuity of operations in the event of an emergency or disaster. The plan shall describe how the contractor would recover a system and have it operational within 12 hours of COOP activation.

The contractor shall prepare the COOP as required by Appendix III to OMB Circular A- 130, NIST 800-53 Revision 4, and NIST 800-34, and any subsequent updates to any of the above. At a minimum, the plan shall include testing and training for the contingency and backup operations, alternate storage and processing sites, and alternate telecommunication services. The contractor shall designate a site that meets all requirements for an alternate storage and operations site. The contractor shall plan for performing disaster recovery exercises, describing the scope and results of the recovery exercise, and note and resolve any deficiencies.

2.5.5 TASK 5 – PREPARE AND DELIVER TRAINING

The contractor shall provide the preparation and delivery of training through a variety of training mechanisms.

2.5.5.1 SUBTASK 1 – PREPARE A TRAINING PLAN

The contractor shall prepare a Training Plan that defines the approach to systems training for Government system administrators and end users, tailored to the specific roles identified for using the system. This Training Plan may include one or more of the following training methods as well as other methods the contractor deems appropriate for the functionality being rolled out to the users:

a. Train the Trainer: The contractor shall provide training to develop Government trainers who will conduct training to the end users.
b. Self Service: The contractor shall provide web-based training that users can access to training materials that shall teach them the system based on the role they have in the system.
c. Virtual Instructor-Led Training: The contractor shall provide instructor-led training that allows users to participate virtually.
d. In-Person, Instructor-Led Training: The contractor shall provide instructor-led training that allows users to participate in person.

The Training Plan shall include a detailed Training Schedule of when materials shall be prepared to support training, the training methods, and the specific training dates.

2.5.5.2 SUBTASK 2 – PREPARE TRAINING MATERIALS

The contractor shall prepare training materials to support the Training Plan as agreed upon with the Government. All training materials must be 508 Compliant. Materials shall include, but are not limited to:

a. Training manuals (electronic) available for download for participants and trainers.
b. Interactive system demonstrations.
c. An online set of frequently asked questions (FAQs).
d. Training material to be placed on a Government-specific training system.
e. User Guides for quick look up by an end-user.
f. Standard Operating Procedures (SOP) for system administrators.
g. Materials to support a Knowledge Management repository residing inside or outside of the system being rolled out.

2.5.5.3 SUBTASK 3 – TRAIN END-USERS

The contractor shall train designated end-users and/or entity trainers to use software in the manner in which it has been configured for the Government. The method and schedule of training shall be established with the Government and if applicable, reflected in the Training Plan.

2.5.5.4 SUBTASK 4 - REGISTER AND TRACK USER TRAINING REGISTRATION

The contractor shall provide a mechanism to track training participants and sessions and identify participants who have not yet attended the required training. If the entity has a training registration capability, the contractor may use that capability, upon agreement with the entity, to satisfy this requirement.

Training Evaluations shall be developed for completion by class participants to assess whether or not training objectives were met and users feel ready to use the new system.

2.5.6 TASK 6 – MIGRATE, SUPPORT, AND STABILIZE SYSTEMS

The contractor shall provide the final implementation of new systems, functionality, interfaces, integrations, and any other technical components. This includes the conversion of data and rollout of new systems and functionality to end-users. During this phase, until the last entity has been migrated to a new system and accepted by the Government, the new system shall be closely monitored and stabilized.

2.5.6.1 SUBTASK 1 – CLEAN UP, CONVERT, AND MIGRATE DATA TO NEW ENVIRONMENT

The contractor shall convert and migrate data and software to the designated operational environment and test to ensure the successful data migration as required by the Government. The contractor shall support Government data cleanup activities by providing reports to any entity involved in data conversion, highlighting data that requires cleanup or population prior to conversion to a new system. The contractor shall work directly with any entity involved in a data conversion.

2.5.6.2 SUBTASK 2 – CUTOVER TO THE NEW SYSTEM

The contractor shall cutover to the new system per the schedule, checklists, and processes defined in the relevant Migration Plan. Cutover is the process of transitioning from one system to a new system. It specifically refers to switching from an old (hardware and/or software) system to a replacement system. The contractor shall deploy the new system to the Government's end-users.

As a part of this process, the contractor shall prepare and provide a Closeout Plan, a Transition Meeting, System Documentation, and a Closeout Report.

a. The Closeout Plan shall provide summary level and detailed information including recommendations to transition from rollout and stabilization to the Ongoing Managed Service Support Task. The plan shall also include a closeout checklist, program assessment, resource reassignment, and lessons learned.

b. The contractor shall schedule a Transition meeting to review the Closeout Plan checklist, and required closeout documentation.
c. The contractor shall provide all documentation necessary to effectively operate and maintain the system.
d. The Closeout Report shall include a summary of key deliverables, program assessment, status of regulatory closeout items, lessons learned, and recommendations for best practices.

2.5.6.3 SUBTASK 3 – STABILIZE THE SYSTEM

The primary goal of stabilization is to improve solution quality and ensure system acceptance. The contractor shall provide the entity with the documentation required to verify the ATO status of the contractor's solution. During stabilization, the contractor shall perform activities and create deliverables that transition the new system from a newly deployed solution to a stable, smoothly running system. During the stabilization period, the contractor shall ensure that support levels are high enough to respond to questions and resolve reported incidents that spike after deployment.

During the early stages of stabilization, it is common for users to report incidents at a rate faster than during later stages. Incidents will slow as users become more familiar with the system, and the contractor resolves system incidents and improves training materials and communication to address future questions.

The contractor shall prepare and provide a Stabilization Plan, a Stabilization Report, and a Performance Report.

a. The Stabilization Plan shall include recommendations for maintaining and improving system stability in addition to identifying and addressing any technical and/or functional issues that occur after deployment. The plan shall include the process and resources required to address issues encountered by end-users.
b. The Stabilization Report shall include any technical or functional issues reported or identified after deployment in addition to recommendations to address the issues.
c. The Performance Report shall include detailed information on how well system performance met each of the service level agreements or performance plans/metrics established.

2.5.6.4 SUBTASK 4 – PROVIDE POST-MIGRATION CUSTOMER SUPPORT

During this subtask, the contractor shall provide onsite, hands-on support to migrated entities and their employees in office locations identified by the Government. Contractor staff shall be available for end users to ask questions on system functionality, assist in resolving system access issues, and where necessary, direct issues to the contractor help desk support teams to formally register system issues and/or incidents. During this period, issues may be uncovered that shall require business rule, system configuration, or other changes. In this case, the contractor shall leverage its configuration change management processes to expedite necessary approvals for changes. The contractor shall prepare weekly Post-Migration Support Reports on support provided, and coordinate reporting across the five environments to facilitate the remediation of common system errors encountered and develop common messaging to alert entity end-users of issues and resolution times.

The contractor shall conduct weekly meetings with key entity stakeholders and management to update them on its observations during the period and make recommendations on actions each entity can take to improve system adoption and reduce the amount of ongoing support required.

At the end of the each month, the contractor shall provide a Findings and Recommendations Report on recommendations implemented, results of the actions, and new actions the entity can take to improve system adoption and reduce the amount of ongoing support required.

All reporting shall include issues, questions, and the associated metrics captured via the contractor help desks.

2.5.7 TASK 7 – PROVIDE MANAGED SERVICE SUPPORT

The contractor shall provide ongoing support of systems including providing application software to the Government's end-users, maintaining the hardware and software hosting environment, providing and testing a disaster recovery site/environment, providing help desk software and services, and performing application maintenance and security upgrades. As a Shared Services Center, the contractor shall continually review the CHCO Council future visions and goals and determine how its solutions can be updated over time to meet those goals. managed service support shall commence when the Government formally accepts the migration.

2.5.7.1 SUBTASK 1 – CONDUCT POST-MIGRATION CHANGE CONTROL, RELEASE MANAGEMENT, AND SYSTEM CONFIGURATION GOVERNANCE (POST-MIGRATION)

Post-migration changes to the system can result from software incidents, routine configuration changes, patches, upgrades, regulatory, legislative and audit changes, and approved and funded requests for enhanced functionality not originally within the scope of the program. Post-migration Change Control and Governance is the formal process used to ensure that these changes are introduced in a controlled and coordinated manner. Change Control and Governance contains the following three components: Change Control Governance, Release Management, and System Configuration.

2.5.7.1.1 POST-MIGRATION CHANGE CONTROL GOVERNANCE

The contractor shall develop a Change Control Governance Plan that defines the contractor's post-migration, ongoing governance approach and structure (as a Shared Services Center), identifies stakeholders, and defines roles and responsibilities of the contractor and entities owning the five new environments and the specific processes that align to the approach.

Processes shall also be developed to facilitate change due to contractor's requirements to implement new system hardware, software, and firmware and other hosting infrastructure components.

Within the Change Control Governance Plan, the Government will be the single organization that governs all change requests, patches, COTS product and other software releases, and COTS product and other software upgrades to their specific environment of the applicable system. Additionally, the Government, in collaboration with the contractor, must be able to request changes to the COTS products and participate with the COTS product vendors in establishing priorities for future enhancements to the base COTS product.

The contractor shall develop Change Control Process and Procedures that define how it shall manage ongoing change requests. The Change Control Process and Procedures shall include:

a. How users/organizations request changes.
b. How the governing bodies review, prioritize, and approve changes.
c. How change control activities are coordinated with software configuration management activities.
d. How change control activities are communicated to stakeholders.
e. How changes are approved, tested, and prioritized for release.

The Configuration Management Plan shall describe the configuration management activities, including identifying, recording, and reporting on infrastructure components (hardware, software, and associated documentation) for the various system configurations during the Ongoing Managed Service Support Task.

Prior to each release for a specific entity, the contractor shall provide and deliver Release Notes, an Installation Guide, and a User Guide to each impacted entity. The Release Guide shall provide detailed information on the corrections, changes, or enhancements made to the system.

The Installation Guide shall contain detailed information on advanced uses of the new release and specific system configurations that shall be required of an entity to enable the new functionality.

The User Guide shall contain detailed functional system information that describes the functionality of the system from a user's perspective. This guide shall be comprehensive enough to be used as the basis for training materials, help desk materials, and system-based help content.

Following each release, the contractor shall provide a Data Dictionary. The Data Dictionary shall contain detailed descriptions of data objects to assist entities in determining future reporting, extract, and interface requirements.

2.5.7.1.2 RELEASE MANAGEMENT

The contractor shall deliver formal Release Management and Configuration Management Plans for the system(s) hardware and software components. The Release Management Plan shall support the Change Control Process and define how the contractor shall manage and deploy software releases containing prioritized fixes, enhancements, and upgrades post-migration.

The Configuration Management Plan shall support the change control process and include the contractor's defined approach for configuration management. The approach shall establish and maintain baseline configurations on hardware, software, and documentation for the system(s).

As part of the configuration management process, the contractor shall establish and maintain the environments required to support simultaneous development, testing, training, and production environments of the five separate entities. At a minimum, the Government requires the following environments to support the initial release, as well as future migrations and new software releases or upgrades. In addition, Government personnel may use one of the environments to test complex transactions prior to executing them in production.

a. Development
b. System Testing

c. Integration/User Acceptance Testing
d. Training
e. Production Simulation
f. Production

2.5.7.1.3 SYSTEM CONFIGURATION

The contractor shall manage the necessary configuration updates due to regulatory, legislative, audit, or other changes. For configuration changes, the contractor shall develop a process that defines who implements the change (contractor or Government) and whether it needs to follow the more extensive change control process, which may require approvals and testing, or whether it can follow an abbreviated process.

2.5.7.2 SUBTASK 2 – PROVIDE PRODUCTION HOSTING SERVICES

The contractor shall maintain the hosting environments, administering appropriate patches and upgrades to ensure high-performance service delivery to the entity consistent with industry standards. To perform hosting services, the contractor shall perform the following activities:

2.5.7.2.1 MANAGE CONFIGURATION

The contractor shall follow the Configuration Management Plan to perform configuration management activities, including identifying, recording, and reporting on infrastructure components (facilities, hardware, software, and associated documentation) for the various system configurations.

2.5.7.2.2 PROVIDE MANAGED SERVICES FOR FACILITIES, HARDWARE, INFRASTRUCTURE, AND SOFTWARE

The contractor shall operate the facilities, hardware, infrastructure, and software necessary to support its solutions. The contractor shall perform ongoing maintenance and upgrades of the environment components to ensure obsolescence is never reached, capacity is sufficient, and vulnerabilities are closed. The contractor shall work with third parties to ensure software and firmware patches and fixes are received and then applied in a timely manner to correct defects and/or prevent future issues and vulnerabilities.

The contractor shall prepare an Ongoing Managed Service Support Plan. The plan shall provide detail on how the following will be accomplished:

a. Performance of general application operations, ongoing fixes, patches, upgrades, and enhancements including regulatory, legislative, union, and other mandatory enhancements.
b. Performance of routine preventive and regular maintenance on the components of the information system.
c. Establishment and maintenance of Government-specific configurations and data.

The contractor shall provide a Responsibility Matrix that identifies the responsibilities and the individuals assigned to those responsibilities. The contractor shall identify both contractor and Government personnel where applicable.

The contractor shall provide a Production Operations Manual that contains detailed descriptions of the system's operations and defines the requirements and procedures for effective operation of the system.

The contractor shall provide a Routine Maintenance schedule that includes the schedule of planned maintenance sessions.

The contractor shall provide a Process Review Report that includes the health of the system. It shall also include a formalized summary of performance reports.

The contractor shall provide an Issues Tracking Log that contains all issues and their validity. The log shall be thorough and contain the status and resolution date of the issue.

The contractor shall provide a User Satisfaction Review that includes a current user satisfaction with the performance capabilities of the system.

The contractor shall provide a System Performance Report that includes capacity, performance, availability, problem trends, and hardware status and performance metrics as defined in service level agreements and performance measure agreements.

2.5.7.2.3 MANAGE CAPACITY

The contractor shall perform capacity management activities, including planning, analyzing, sizing, and optimizing capacity to enable the production environment can handle current and projected future data processing demand.

2.5.7.2.4 MAINTAIN AVAILABILITY

The contractor shall ensure ongoing availability of the system except for planned and agreed upon maintenance windows as defined in performance measures. The contractor shall provide standard maintenance windows for applying infrastructure releases, including hardware upgrades, with no disruption to the Government during the established business hours. With adequate notice, the contractor shall work with the Government to schedule an outage outside of the maintenance windows.

2.5.7.2.5 PERFORM ONGOING SOFTWARE AND DATA BACK-UPS

The contractor shall conduct backups to ensure that no data is lost. The contractor shall develop and publish a backup and offsite storage plan that does not affect system processing and is incorporated and tested as part of the disaster recovery testing cycle.

2.5.7.2.6 SUPPORT PENETRATION TESTING

The contractor shall allow the Government to perform penetration testing of the systems in the hosted environment and provide any access necessary to Government personnel or other third-party personnel as authorized by the FEDSIM COR to perform penetration testing.

2.5.7.2.7 MAINTAIN SYSTEM DOCUMENTATION

The contractor shall develop and update documentation on systems' technical environments for all environments within two weeks of a change. The contractor shall make this documentation available and easily accessible to the Government in an electronic format.

The contractor shall provide a Technical Manual that contains documentation on the technical environment. The Manual shall be updated as changes occur to the technical environment.

2.5.7.3 SUBTASK 3 – UPGRADE THE SYSTEM

The contractor shall upgrade the system with software updates and/or new releases provided by COTS software providers, collaborating with the Government to determine the priority and scheduling of the work, taking into consideration, the timing of other changes to the system as driven by the entity. The contractor shall work with COTS software providers to understand the features and functions available in new releases or updates so that effective planning and analysis can be done with the Government.

2.5.7.4 SUBTASK 4 – PERFORM APPLICATION AND INFRASTRUCTURE MAINTENANCE

The contractor shall perform routine preventive and regular maintenance on the components of the system in accordance with manufacturer or contractor specifications and/or organizational requirements. The contractor shall establish, populate and maintain Government-specific configurations and data. The contractor must have effective controls on the tools, techniques, mechanisms, and personnel used to conduct system maintenance. All vulnerability prevention and patching shall be kept current. The contractor shall report any vulnerability or patch that is not resolved or will not be resolved within approved time limits immediately to the Government PM for disposition. The contractor shall implement regulatory, legislative, and Government-mandated changes to the systems, work with stakeholders to determine the appropriate configurations needed to implement the change, and determine the release schedule for implementing the change.

The contractor shall develop routine maintenance schedules for approval by the FEDSIM COR or by a designate. Routine maintenance shall be conducted during off hours. If significant maintenance or an improvement is to be performed, then these events shall occur during off hours as negotiated with the Government for each event.

2.5.7.5 SUBTASK 5 – MAINTAIN AND EXECUTE CONTINUITY OF OPERATIONS PLANNING (COOP)

The contractor shall maintain and provide upon request the COOP developed during the migration preparation phase. The COOP must continue to comply with guidance contained in Federal Preparedness Circular 65 (FPC-65) and any subsequent updates for providing continuity of operations in the event of an emergency or disaster. The contractor shall have the system operational for the Government's use within 12 hours of COOP activation.

The contractor shall be required to perform an annual test of the contractor's disaster recovery plan. That test shall meet Federal standards. The Government reserves the right to observe and participate in the contractor's disaster recovery testing process.

The contractor shall have a contingency plan as required by Appendix III to OMB Circular A-130, NIST 800-53 Revision 4, and NIST 800-34 and any subsequent updates. At a minimum, the plan shall include testing and training for the contingency and backup operations, alternate storage and processing sites, and alternate telecommunication services. The contractor shall designate a site meeting all requirements for an alternate storage and operations site. The

contractor shall perform disaster recovery exercises, describe the scope and results of the recovery exercise, and note and resolve any deficiencies.

In addition, the contractor shall perform regularly scheduled backup and recovery procedures and produce a log of events that occur during the backup and recovery process. The contractor shall produce a report that provides a remediation status of any issues (both short-term and long-term) to indicate how the contractor will prevent the issue in the future.

The contractor shall provide a Contingency Plan that includes testing and training for the contingency and backup operations, and alternate storage and processing sites. The contractor shall designate a site meeting all requirements for an alternate storage and operations site. The contractor shall perform disaster recovery exercises, describe the scope and results of the recovery exercise, and note and resolve any deficiencies.

The contractor shall perform Annual Disaster Recovery Tests to indicate its ability to recover the application and data in the event of a significant outage or disaster.

The contractor shall provide a Disaster Recovery Test Results Report including plans for addressing issues uncovered during the test.

2.5.7.6 SUBTASK 6 – MANAGE, REPORT, AND RESOLVE INCIDENTS

The contractor shall develop an Incident Management Plan in order to establish the processes and procedures for reporting and resolving system incidents. The contractor shall bring emergency maintenance incidents or system outages during normal business hours of operations to the attention of the FEDSIM COR and TPOC as quickly as possible. End-user notification shall be the responsibility of the contractor. Response time is the time that a contractor responds via email or phone to a technical support ticket being opened. The response may include notification of a resolution, a request for more information, or any other communication aimed at resolving the incident. The contractor shall maintain an Incident Tracking Log documenting incidents and their resolution.

2.5.7.7 SUBTASK 7 – PROVIDE HELP DESK SERVICES

The contractor shall establish and maintain help desk functionality for each system, including providing a system that the contractor uses to capture, monitor, and report Government inquiries and resolution status. The help desk must operate during hours prescribed and agreed upon in Performance Measures for the system. Response time to answer calls and respond to other inquiry mechanisms (such as email or direct end-user entry into contractor's help desk system) shall also be established in the Performance Measures defined for the system.

If required, the contractor shall develop an interface with the Government's help desk systems so that open tickets can be viewed by the Government's internal help desk personnel in a consolidated fashion with business help desk tickets.

In addition, the contractor shall provide a Help Desk Metrics Report that includes detailed and summary–level data on the following:

a. Government Satisfaction Survey Results
b. Agent Utilization
c. First Contact Resolution Rate

d. First Level Resolution Rate
e. Agent Satisfaction
f. Aggregate Service Desk Performance

2.5.7.8 SUBTASK 8 – PROVIDE HELP DESK SOFTWARE TO GOVERNMENT

The contractor shall enable help desk licenses for use by Government employees to provide business/functional help desk services to its employees or to allow users to enter inquiries directly into the system. The contractor shall also provide sufficient infrastructure capacity to support the additional ticket volume generated by the entity.

2.5.7.9 SUBTASK 9 – PERFORM ADDITIONAL HELP DESK SERVICES ON BEHALF OF THE ENTITIES

The contractor shall provide additional help desk services on behalf of the entities as requested. Help desk services could include business, functional, and/or process help desk support as defined by the entity.

2.5.7.10 SUBTASK 10 – MAINTAIN HELP AND TRAINING CONTENT

The contractor shall maintain the context-based help content and training material content to reflect changes to the system and improve the content based on user feedback.

2.5.7.11 SUBTASK 11 – RESPOND TO AUDIT REQUESTS

The contractor shall assist entities by providing specialized data extracts and documentation support during system audits, which occur approximately two to four times per year. These requests may require identifying or providing new documentation, or creating custom extracts to satisfy the requirements of the audit request. The contractor shall perform this action upon written notification by the TPOC as needed.

The contractor shall develop a data retention strategy for an entity that is being dissolved.

2.5.8 TASK 8 – PROVIDE SECURITY MANAGEMENT

The contractor shall provide security management support for HR and T&A systems and associated services that shall support HR and T&A business functions. GSA security-related regulations identified in the paragraphs below and in Section 7.3 shall be adhered to for the GSA HR-managed environment and the organizations being supported within the GSA environment. For organizations outside the GSA-managed environment (OPM, NCUA, RRB, and USIP) covered under this TO, the contractor shall ensure that it complies with the internal security regulations pertinent to those organizations.

2.5.8.1 SUBTASK 1 – ASSESSMENT AND AUTHORIZATION (A&A) ACTIVITIES

The implementation of a new Federal Government IT system requires a formal approval process known as Assessment and Authorization (A&A). NIST Special Publication 800-37, Revision 1 (hereafter described as NIST 800-37) and GSA IT Security Procedural Guide 06-30, “Managing Enterprise Risk,” provide guidelines for performing the A&A process. The contractor system/application must have a valid A&A, known as an ATO (signed by the Federal Government) before going into operation and processing Federal information. The failure to

obtain and maintain a valid ATO will result in the termination of the contract. The system must have a new A&A conducted (signed by the Federal Government) at least every three years or at the discretion of the Authorizing Official when there is a significant change to the system's security posture. All NIST 800-53 controls must be tested/assessed every three years or as defined by policy.

2.5.8.1.1 ASSESSING THE SYSTEM

a. The contractor shall comply with A&A requirements as mandated by Federal laws and policies, including making available any documentation, physical access, and logical access needed to support this requirement. The level of effort for the A&A is based on the System's NIST Federal Information Processing Standard (FIPS) Publication 199 categorization. The contractor shall create, maintain, and update the following A&A documentation:
    1. System Security Plan (SSP) completed in agreement with NIST Special Publication 800-18, Revision 1, "Guide for Developing Security Plans for Federal Information Systems." The SSP shall include, as appendices, required policies and procedures across 18 control families mandated per FIPS 200, Rules of Behavior, and Interconnection Agreements (in agreement with NIST Special Publication 800-47, "Security Guide for Interconnecting Information Technology Systems"). The SSP shall include, as an appendix, a completed GSA 800-53 Control Tailoring worksheet included in Appendix A of this guide. Column E of the worksheet titled "Contractor Implemented Settings" shall document all contractor-implemented settings that are different from the GSA-defined setting and where the GSA-defined setting allows a contractor-determined setting).
    2. Contingency Plan (including Disaster Recovery Plan) completed in agreement with NIST Special Publication 800-34.
    3. Contingency Plan Test Report completed in agreement with GSA IT Security Procedural Guide 06-29, "Contingency Plan Testing."
    4. Plan of Actions and Milestones (POA&M) completed in agreement with GSA IT Security Procedural Guide 09-44, "Plan of Action and Milestones (POA&M)."
    5. Penetration Test Reports documenting the results of vulnerability analysis and exploitability of identified vulnerabilities. Note: Penetration testing is required for all FIPS 199 low impact and moderate impact internet-accessible information systems, and all FIPS 199 high impact information systems are required to complete an independent penetration test and provide an Independent Penetration Test Report documenting the results of the exercise as part of the A&A package. Reference GSA IT Security Procedural Guide 06-30: "Managing Enterprise Risk" and GSA IT Security Procedural Guide 11-51, "Conducting Penetration Test Exercises" for penetration testing guidance.
b. Information systems must be assessed and authorized every three years or whenever there is a significant change to the system's security posture in accordance with NIST Special Publication 800-37 Revision 1, "Guide for the Security Certification and Accreditation of Federal Information Systems," and CIO IT Security 06-30, "Managing Enterprise Risk."

c. At the moderate impact level and higher, the contractor shall be responsible for providing an independent Security Assessment/Risk Assessment in accordance with GSA IT Security Procedural Guide 06-30, "Managing Enterprise Risk."

- If the Government is responsible for providing a Security Assessment/Risk Assessment and Penetration Test, the contractor shall allow GSA employees (or GSA-designated third-party contractors) to conduct A&A activities to include control reviews in accordance with NIST 800-53/NIST 800-53A and GSA IT Security Procedural Guide 06-30, "Managing Enterprise Risk." Review activities include, but are not limited to, operating system vulnerability scanning, web application scanning, and database scanning of applicable systems that support the processing, transportation, storage, or security of GSA information. This includes the general support system infrastructure.

d. Identified gaps between required 800-53 controls and the contractor's implementation as documented in the Security Assessment/Risk Assessment Report shall be tracked for mitigation in a POA&M document completed in accordance with GSA IT Security Procedural Guide 09-44, "Plan of Action and Milestones (POA&M)." Depending on the severity of the gaps, the Government may require the gaps to be remediated before an ATO is issued.

e. The contractor is responsible for mitigating all security risks found during A&A and continuous monitoring activities. All high-risk vulnerabilities must be mitigated within 30 days and all moderate risk vulnerabilities must be mitigated within 90 days from the date vulnerabilities are formally identified. The Government will determine the risk rating of vulnerabilities.

2.5.8.1.2 AUTHORIZATION OF THE SYSTEM

a. Upon receipt of the documentation (Security Authorization Package (SAP)) described in GSA IT Security Procedural Guide 06-30, "Managing Enterprise Risk" and NIST Special Publication 800-37 as documented above, the GSA Authorizing Official (AO) for the system (in coordination with the GSA Chief Information Security Officer (CISO), system PM, Information System Security Manager (ISSM), and Information System Security Officer (ISSO) will render an authorization decision to:

   1. Authorize system operation without any restrictions or limitations on its operation.
   2. Authorize system operation with restriction or limitation on its operation.
   3. Not authorize operation.

b. When requested, the contractor shall provide access to the Federal Government, or its designee acting as its agent, in order to verify compliance with the requirements for an IT security program. At its option, the Government may choose to conduct on-site surveys. The contractor shall make appropriate personnel available for interviews and documentation during this review. If documentation is considered proprietary or sensitive, these documents may be reviewed on-site under the hosting contractor's supervision.

2.5.8.2 SUBTASK 2 – REPORTING AND CONTINUOUS MONITORING

Maintenance of the security authorization to operate shall be through continuous monitoring of security controls of the contractor's system and its environment of operation to determine if the security controls in the information system continue to be effective over time in light of changes that occur in the system and environment.

Through continuous monitoring, security controls and supporting deliverables are updated and submitted to the Government. The following shall provide a current understanding of the security state and risk posture of the information systems. These shall allow GSA AOs to make credible risk-based decisions regarding the continued operations of the information systems and initiate appropriate responses as needed when changes occur.

The contractor shall:

a. Provide POA&M updates in accordance with requirements and the schedule set forth in GSA CIO IT Security Procedural Guide 09-44, "Plan of Action and Milestones."
b. Provide vulnerability scan reports from Web Application, Database, and Operating System Scans. Scan results shall be managed and mitigated in POA&Ms and submitted together with the quarterly POA&M submission.
c. Review and update the SSP annually to ensure the plan is current and accurately describes implemented system controls and reflects changes to the contractor system and its environment of operation. The SSP must be in accordance with NIST 800-18, Revision 1, Guide for Developing Security Plans.
d. Provide an annual update to the contingency plan completed in accordance with NIST 800-34, Contingency Planning Guide.
e. Provide the results of the annual review and validation of system users' accounts to ensure the continued need for system access. The user certification and authorization documents shall illustrate the organization establishes, activates, modifies, reviews, disables, and removes information system accounts in accordance with documented account management procedures.
f. Develop and furnish a separation of duties matrix reflecting proper segregation of duties for IT system maintenance, management, and development processes. The separation of duties matrix shall be updated or reviewed on an annual basis.
g. Provide the results of security awareness (AT-2) and role-based information security technical training (AT-3). AT-2 requires basic security awareness training for employees and contractors that support the operation of the contractor system. AT-3 requires information security technical training to information system security roles. Training shall be consistent with the requirements contained in C.F.R. Part 5 Subpart C (5 C.F.R 930.301) and conducted at least annually.
h. Deliver the results of the annual FISMA assessment conducted per GSA Chief Information Officer (CIO) IT Security Procedural Guide 04-26, "FISMA Implementation." The assessment is completed using the GSA on-line assessment tool.
i. Provide a well-defined, documented, and up-to-date specification to which the information system is built.
j. Establish and document mandatory configuration settings for IT products employed within the information system that reflect the most restrictive mode consistent with

operational requirements. Configuration settings are the configurable security-related parameters of IT products that compose the information system. Systems shall be configured in agreement with GSA technical guidelines, NIST guidelines, Center for Internet Security guidelines (Level 1), or industry best practice guidelines in hardening the systems, as deemed appropriate by the Authorizing Official.

k. Provide an annual update to the Configuration Management Plan for the information system.

l. Provide a contingency plan test report completed in accordance with GSA IT Security Procedural Guide 06-29, "Contingency Plan Testing." A continuity test shall be conducted annually prior to mid-July of each year. The continuity test can be a table top test while the system is at the "Low Impact" level. The table top test must include Federal and hosting contractor representatives. Moderate and high impact systems must complete a functional exercise at least once every three years.

m. Provide an incident response plan test report documenting results of incident reporting process per GSA IT Security Procedural Guide 01-02, "Incident Handling."

n. Provide the results of annual reviews and validations of physical access authorizations to facilities supporting the contractor system to ensure the continued need for physical access.

o. Provide the results of annual reviews and validations of visitor access records to ensure the accuracy and fidelity of collected data.

p. Provide updated Interconnection Security Agreements (ISA) and supporting Memorandum of Agreement/Understanding (MOA/U), completed in accordance with NIST 800-47, "Security Guide for Connecting Information Technology Systems," for existing and new interconnections. Per NIST 800-47, an interconnection is the direct connection of two or more IT systems for the purpose of sharing data and other information resources through a pipe, such as ISDN, T1, T3, DS3, VPN, etc. Interconnections agreements shall be submitted as appendices to the SSP.

q. Define and establish Rules of Behavior for information system users. Rules of Behavior shall be submitted as an appendix to the SSP.

2.5.8.3 SUBTASK 3 – POLICIES AND PROCEDURES

The contractor shall develop and maintain current the following policies and procedures:

a. Access Control Policy and Procedures (NIST 800-53 AC-1)

b. Security Awareness and Training Policy and Procedures (NIST 800-53 AT-1)

c. Audit and Accountability Policy and Procedures (NIST 800-53 AU-1)

d. Identification and Authentication Policy and Procedures (NIST 800-53 IA-1)

e. Incident Response Policy and Procedures (NIST 800-53 IR-1, reporting timeframes are documented in GSA CIO IT Security Procedural Guide 01-02, Incident Handling

f. System Maintenance Policy and Procedures (NIST 800-53 MA-1)

g. Media Protection Policy and Procedures (NIST 800-53 MP-1)

h. Physical and Environmental Policy and Procedures (NIST 800-53 PE-1)

i. Personnel Security Policy and Procedures (NIST 800-53 PS-1)

j. System and Information Integrity Policy and Procedures (NIST 800-53 SI-1)

k. System and Communication Protection Policy and Procedures (NIST 800-53 SC-1)
l. Key Management Policy (NIST 800-53 SC-12)

2.5.9 TASK 9 – ENHANCEMENTS, FUTURE SYSTEM FUNCTIONALITY, AND OTHER SERVICES (OPTIONAL)

This Optional Task provides the ability for an entity to obtain enhancements to the solution managed under this TO as well as new system functionality and additional services from the contractor provided under SINs 22 and 26. Examples of enhancements include new interfaces, reports, and system functionality. Examples of future systems include learning management, staff acquisition, imaging, position description, help desk, and data repositories/warehouses, and could include the software as well as program management, requirements and business analysis, hosting, configuration, implementation, testing training, and rollout of the new systems. Services include transitioning an agency to an existing or new environment, developing training material and conducting training, increasing the level of help desk services, migrating data to a data repository or system database, performing requirements or business analysis, and providing services for future systems or large enhancements to the existing solution.

2.5.9.1 SUBTASK - 1 TRANSITION-OFF AN EXISTING ENTITY (OPTIONAL)

The contractor shall provide support required to transition an existing entity to a different service provider's systems or to an internal system, including exporting data and providing it to the new provider. The contractor shall also support the dissolution and closing out of an entity's activities and data in the system.

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4.1 PLACE OF INSPECTION AND ACCEPTANCE

Inspection and acceptance of all work performance, reports, and other deliverables under this TO shall be performed in the Washington, D.C. metro area by the OHRM TPOC, in coordination with the FEDSIM COR.

4.2 SCOPE OF INSPECTION

All deliverables will be inspected for content, completeness, accuracy, and conformance to TO requirements by the FEDSIM COR. Inspection may include validation of information or software through the use of automated tools, testing, or inspections of the deliverables, as specified in the TO. The scope and nature of this inspection will be sufficiently comprehensive to ensure the completeness, quality, and adequacy of all deliverables.

The Government requires a period NTE 15 workdays after receipt of final deliverable items for inspection and acceptance or rejection.

4.3 BASIS OF ACCEPTANCE

The basis for acceptance shall be in compliance with the requirements set forth in the TO, the contractor's quote, and relevant terms and conditions of the contract. Deliverable items rejected shall be corrected in accordance with the applicable clauses (Section 9, Attachment J).

Reports, documents, and narrative-type deliverables will be accepted when all discrepancies, errors, or other deficiencies identified in writing by the Government have been corrected.

If the draft deliverable is adequate, the Government may accept the draft and provide comments for incorporation into the final version.

All of the Government's comments on deliverables must either be incorporated in the succeeding version of the deliverable, or the contractor must explain to the Government's satisfaction why such comments should not be incorporated.

If the Government finds that a draft or final deliverable contains spelling errors, grammatical errors, or improper format, or otherwise does not conform to the requirements stated within this TO, the document may be immediately rejected without further review and returned to the contractor for correction and resubmission. If the contractor requires additional Government guidance to produce an acceptable draft, the contractor shall arrange a meeting with the FEDSIM COR.

4.4 DRAFT DELIVERABLES

The Government will provide written acceptance, comments, and/or change requests, if any, within 15 workdays (unless specified otherwise in Section 5 - Deliverables or Performance) from Government receipt of the draft deliverable.

Upon receipt of the Government comments, the contractor shall have ten workdays to incorporate the Government's comments and/or change requests and to resubmit the deliverable in its final form.

4.5 WRITTEN ACCEPTANCE/REJECTION BY THE GOVERNMENT

The FEDSIM CO or COR will provide written notification of acceptance or rejection of all final deliverables within 15 workdays (unless specified otherwise in Section 5 - Deliverables or Performance). All notifications of rejection will be accompanied with an explanation of the specific deficiencies causing the rejection.

4.6 NON-CONFORMING PRODUCTS OR SERVICES

Non-conforming products or services will be rejected. Deficiencies will be corrected, by the contractor, within ten workdays of the rejection notice. If the deficiencies cannot be corrected within ten workdays, the contractor shall immediately notify the FEDSIM COR of the reason for the delay and provide a proposed corrective action plan within ten workdays.

If the contractor does not provide products or services that conform to the requirements of this TO, the Government will not pay the fixed price associated with the non-conforming products or services.

5.1 PERIOD OF PERFORMANCE

The period of performance for this TO is one six-month Base Period, one 12-month Option Period, one six-month Option Period, followed by eight, 12-month Option Periods as shown in the table below.

Period	Duration
Base period	6 months
Option 1	12 months
Option 2	6 months
Option 3-10	12 months each

Normal hours of operations are Monday through Friday from 8am-5pm Eastern Time.

5.2 PLACE OF PERFORMANCE

Place of performance is the contractor's facilities. The contractor may be required to travel to GSA facilities within the Continental United States (CONUS).

5.3 TASK ORDER SCHEDULE AND MILESTONE DATES

The following schedule of milestones will be used by the FEDSIM COR to monitor timely progress under this TO.

The following abbreviations are used in this schedule:

NLT: No Later Than
TOA: Task Order Award
All references to Days: Government Workdays

Deliverables are due the next Government workday if the due date falls on a holiday or weekend.

The contractor shall deliver the deliverables listed in the following table on the dates specified:

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
X	Project Start (PS)	-	At beginning of period of performance	None
01	Kick-Off Meeting	2.5.1.1	10 Calendar Days after beginning of period of performance	None
02	Spend Plan Draft	2.5.1.1	At Kick-Off Meeting; Updates in accordance with IMS	Unlimited IAW 52.227-14
03	Monthly Status Report	2.5.1.2	On the 10th of each Month	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
04	Weekly Status Reports	2.5.1.3	Weekly	Unlimited IAW 52.227-14
05	Project Management Plan Draft	2.5.1.4	At Kick-Off Meeting; Updates as needed	Unlimited IAW 52.227-14
06	Project Management Plan Final	2.5.1.4	20 calendar days after beginning of period of performance; Updates as needed	Unlimited IAW 52.227-14
07	Communications Plan	2.5.1.4.1	In accordance with the PMP	Unlimited IAW 52.227-14
08	Communications Content and Materials	2.5.1.4.1	In accordance with the PMP	Unlimited IAW 52.227-14
09	Migration Communication Plan	2.5.1.4.1	In accordance with the IMS	Unlimited IAW 52.227-14
10	Staffing Management Plan	2.5.1.4.2	In accordance with the PMP	Unlimited IAW 52.227-14
11	Risk Management Plan and Issue/Risk Log	2.5.1.4.3	In accordance with the PMP	Unlimited IAW 52.227-14
12	Risk Reviews Report	2.5.1.4.3	Bi-weekly	Unlimited IAW 52.227-14
13	Quality Control Plan (QCP)	2.5.1.4.4	In accordance with the PMP	Unlimited IAW 52.227-14
14	Integrated Master Schedule (IMS) Draft	2.5.1.4.5	At Kick Off Meeting; Updated weekly	Unlimited IAW 52.227-14
15	Fit/Gap Analysis Sessions	2.5.2	In accordance with the IMS	Unlimited IAW 52.227-14
16	Fit/Gap Analysis Report	2.5.2.2	In accordance with the IMS	Unlimited IAW 52.227-14
17	Proof of Concept Demonstration	2.5.2.3	In accordance with the IMS	Unlimited IAW 52.227-14
18	BPR Plan and Schedule	2.5.2.4	In accordance with the IMS	Unlimited IAW 52.227-14
19	BPR Meeting Materials	2.5.2.4	In accordance with the IMS	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
20	Initial Migration Plan and Schedule	2.5.2.5	In accordance with the IMS	Unlimited IAW 52.227-14
21	Hosting Setup Plan	2.5.3.1	20 business days after beginning of period of performance	Unlimited IAW 52.227-14
22	Hosting Set Up Report	2.5.3.1	5 days after completion of Hosting Set up	Unlimited IAW 52.227-14
23	Performance Report	2.5.3.1	5 days after completion of Hosting Set up; Updates Weekly	Unlimited IAW 52.227-14
24	Data Cleanup Plan	2.5.4.2	In accordance with the IMS	Unlimited IAW 52.227-14
25	System Documentation Technical Manual	2.5.3.8	In accordance with the IMS	Unlimited IAW 52.227-14
26	Data Conversion Plan	2.5.4.2	In accordance with the IMS	Unlimited IAW 52.227-14
27	Data Migration Plan	2.5.4.2	In accordance with the IMS	Unlimited IAW 52.227-14
28	Data Conversion and Migration Report	2.5.4.2	In accordance with the IMS	Unlimited IAW 52.227-14
29	Mitigation/Deployment Plan	2.5.4.3	In accordance with IMS	Unlimited IAW 52.227-14
30	Post-Deployment Review Report	2.5.4.3	In accordance with IMS	Unlimited IAW 52.227-14
31	Lessons Learned Report	2.5.4.3	In accordance with IMS	Unlimited IAW 52.227-14
32	Requirements Traceability Matrix	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
33	Design Review Sessions	2.5.4.4	Upon completion of designs	Unlimited IAW 52.227-14
34	Configuration Files	2.5.4.4	5 days prior to each release	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
35	System Architecture Document	2.5.4.4	At design review and as architecture changes	Unlimited IAW 52.227-14
36	Interface Control Documents	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
37	System Design Document (SDD)	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
38	Product Architecture Document	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
39	Functional Flow Document	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
40	Hardware Architecture Document	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
41	Topological Architecture Diagram	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
42	Nodes Connectivity Diagram	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
43	Version Description Document	2.5.4.4	In accordance with the IMS	Unlimited IAW 52.227-14
44	System Change Control Plan	2.5.4.5	In accordance with the IMS	Unlimited IAW 52.227-14
45	Configuration Management Plan	2.5.4.5.1	In accordance with the IMS	Unlimited IAW 52.227-14
46	Security Configuration Checklist	2.5.4.5.1	10 business days prior to first rollout	Unlimited IAW 52.227-14
47	System Configuration and Change Control Governance Plan	2.5.4.5.2	In accordance with the PMP	Unlimited IAW 52.227-14
48	Test Plan	2.5.4.11.1	In accordance with the IMS	Unlimited IAW 52.227-14
49	Test Scenarios	2.5.4.11.2	In accordance with the IMS	Unlimited IAW 52.227-14
50	Test Cases	2.5.4.11.2	In accordance with the IMS	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
51	Test Scripts	2.5.4.11.2	In accordance with the IMS	Unlimited IAW 52.227-14
52	Test Readiness Go/No-Go Form	2.5.4.11.2	In accordance with the IMS	Unlimited IAW 52.227-14
53	Test Report	2.5.4.11.3	In accordance with the IMS	Unlimited IAW 52.227-14
54	Operational Readiness Technical Manuals	2.5.4.11.5	In accordance with the IMS	Unlimited IAW 52.227-14
55	Systems Management Guide	2.5.4.11.5	In accordance with the IMS	Unlimited IAW 52.227-14
56	Incident Response Plan	2.5.4.11.5	90 days after beginning of period of performance	Unlimited IAW 52.227-14
57	Deployment and Cutover Acceptance Plan	2.5.4.12	In accordance with the IMS	Unlimited IAW 52.227-14
58	Deployment and Cutover Acceptance Checklist	2.5.4.12	In accordance with the IMS	Unlimited IAW 52.227-14
59	Continuity of Operations Plan	2.5.4.13	In accordance with the IMS	Unlimited IAW 52.227-14
60	Functional Process Documentation	2.5.4.14	In accordance with the IMS	Unlimited IAW 52.227-14
61	BPR Report	2.5.4.14	In accordance with the IMS	Unlimited IAW 52.227-14
62	Training Plan	2.5.5.1	In accordance with the IMS	Unlimited IAW 52.227-14
63	Training Schedule	2.5.5.1	In accordance with the IMS	Unlimited IAW 52.227-14
64	Training Materials	2.5.5.2	In accordance with the IMS	Unlimited IAW 52.227-14
65	Standard Operating Procedures	2.5.5.2	In accordance with IMS	Unlimited IAW 52.227-14
66	Training Evaluations	2.5.5.4	After each training session	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
67	Closeout Plan	2.5.6.2	In accordance with IMS	Unlimited IAW 52.227-14
68	Transition Meeting	2.5.6.2	In accordance with IMS	Unlimited IAW 52.227-14
69	Closeout Report	2.5.6.2	20 days prior to closeout	Unlimited IAW 52.227-14
70	Stabilization Plan	2.5.6.3	10 business days prior to first rollout	Unlimited IAW 52.227-14
71	Stabilization Report	2.5.6.3	Weekly, after the first rollout	Unlimited IAW 52.227-14
72	Performance Report	2.5.6.3	Weekly, after the first rollout	Unlimited IAW 52.227-14
73	Post-Migration Support Report	2.5.6.4	Weekly, after the first rollout	Unlimited IAW 52.227-14
74	Post-Migration Findings and Recommendation Report	2.5.6.4	Monthly, after the first rollout	Unlimited IAW 52.227-14
75	Release Notes	2.5.7.1.1	5 business days prior to each release	Unlimited IAW 52.227-14
76	Installation Guide	2.5.7.1.1	5 business days prior to each release	Unlimited IAW 52.227-14
77	User Guide	2.5.7.1.1	5 business days prior to each release	Unlimited IAW 52.227-14
78	Data Dictionary	2.5.7.1.1	5 business days prior to each release	Unlimited IAW 52.227-14
79	Change Control Governance Plan	2.5.7.1.1	20 business days after beginning of period of performance	Unlimited IAW 52.227-14
80	Installation Guide	2.5.7.1.1	In accordance with IMS	Unlimited IAW 52.227-14
81	User Guide	2.5.7.1.1	In accordance with IMS	Unlimited IAW 52.227-14
82	Data Dictionary	2.5.7.1.1	In accordance with IMS	Unlimited IAW 52.227-14

DEL #	MILESTONE/ DELIVERABLE	RFQ SECTION	DATE OF COMPLETION/ DELIVERY	GOV'T RIGHTS IN DATA
83	Release Management Plan	2.5.7.1.2	In accordance with IMS	Unlimited IAW 52.227-14
84	Configuration Management Plan	2.5.7.1.2	In accordance with the IMS	Unlimited IAW 52.227-14
85	Ongoing Managed Services Support Plan	2.5.7.2.2	10 business days after beginning of period of performance	Unlimited IAW 52.227-14
86	Production Operations Manual	2.5.7.2.2	In accordance with IMS	Unlimited IAW 52.227-14
87	Routine Maintenance Schedule	2.5.7.2.2	In accordance with IMS	Unlimited IAW 52.227-14
88	User Satisfaction Review	2.5.7.2.2	In accordance with IMS	Unlimited IAW 52.227-14
89	System Performance Report	2.5.7.2.2	10 business days after beginning of period of performance; Updates weekly	Unlimited IAW 52.227-14
90	Incident Management Plan	2.5.7.6	In accordance with IMS	Unlimited IAW 52.227-14
91	Help Desk Metrics Report	2.5.7.7	10 business days after beginning of period of performance; Updates weekly	Unlimited IAW 52.227-14
92	System Security Plan	2.5.8.1.1	In accordance with the IMS	Unlimited IAW 52.227-14
93	Extensions and Customization code	2.5.4.4	In accordance with IMS	Unlimited IAW 52.227-14

The contractor shall mark all deliverables listed in the above table to indicate authorship by contractor (i.e., non-Government) personnel; provided, however, that no deliverable shall contain any proprietary markings inconsistent with the Government's data rights set forth in this TO. The Government reserves the right to treat non-confirming markings in accordance with subparagraphs (e) and (f) of the FAR clause at 52.227-14.

5.4 PUBLIC RELEASE OF CONTRACT DOCUMENTS REQUIREMENT

The contractor agrees to submit, within ten workdays from the date of the CO's execution of the initial TO, or any modification to the TO (exclusive of Saturdays, Sundays, and Federal holidays), a portable document format (PDF) file of the fully executed document with all

proposed necessary redactions, including redactions of any trade secrets or any commercial or financial information that it believes to be privileged or confidential business information, for the purpose of public disclosure at the sole discretion of GSA. The contractor agrees to provide a detailed written statement specifying the basis for each of its proposed redactions, including the applicable exemption under the Freedom of Information Act (FOIA), 5 U.S.C. § 552, and, in the case of FOIA Exemption 4, 5 U.S.C. § 552(b)(4), shall explain why the information is considered to be a trade secret or commercial or financial information that is privileged or confidential. Information provided by the contractor in response to the contract requirement may itself be subject to disclosure under the FOIA. Submission of the proposed redactions constitutes concurrence of release under FOIA.

GSA will carefully consider all of the contractor's proposed redactions and associated grounds for nondisclosure prior to making a final determination as to what information in such executed documents may be properly withheld.

5.5 DELIVERABLES MEDIA

The contractor shall deliver all electronic versions by email and removable electronic media, as well as placing in the GSA OHRM's designated repository. The following are the required electronic formats, whose versions must be compatible with the latest, commonly available version on the market.

Text	MS Word, Google Docs
Spreadsheets	MS Excel, Google Sheets
Briefings	MS PowerPoint, Google Slides
Drawings	MS Visio, Google Drawings
Schedules	MS Project, Smartsheet

5.6 PLACE(S) OF DELIVERY

Copies of all deliverables shall be delivered to the FEDSIM COR and GSA OHRM TPOC at the following addresses:

GSA FAS AAS FEDSIM
ATTN: Angelica Matias, COR
1800 F Street, NW
Suite 3100 (QF0B)
Washington, D.C. 20405
Telephone: (202) 306-5261
Email: angelica.matias@gsa.gov

OHRM TPOC Contact Information to be provided after Award. Additional TPOCs will be assigned to separate agencies post-migration.

5.7 NOTICE REGARDING LATE DELIVERY/ PROBLEM NOTIFICATION REPORT (PNR)

The contractor shall notify the FEDSIM COR via a Problem Notification Report (PNR) (Section 9 - List of Attachments, Attachment D as soon as it becomes apparent to the contractor that a scheduled delivery will be late. The contractor shall include in the PNR the rationale for late delivery, the expected date for the delivery, and the project impact of the late delivery. The

FEDSIM COR will review the new schedule and provide guidance to the contractor. Such notification in no way limits any Government contractual rights or remedies including, but not limited to, termination.

5.8 GSA INFORMATION TECHNOLOGY (IT) SECURITY REQUIREMENTS

The contractor shall deliver an IT Security Plan within 30 calendar days of award that describes the processes and procedures that will be followed to ensure appropriate security of IT resources that are developed, processed, or used under this order. The IT Security Plan shall comply with applicable Federal laws including, but not limited to, 40 U.S.C. 11331, the FISMA of 2002, and the E-Government Act of 2002. The IT Security Plan shall meet IT security requirements in accordance with Federal and GSA policies and procedures, including General Services Administration Regulation (GSAR) clause 552.239-71. The contractor shall submit written proof of IT security authorization six months after award, and verify that the IT Security Plan remains valid annually.

6.1 CONTRACTING OFFICER'S REPRESENTATIVE (COR)

The FEDSIM CO appointed a FEDSIM COR in writing through a COR Appointment Letter (Section 9 – List of Attachments, Attachment A). The FEDSIM COR will receive, for the Government, all work called for by the TO and will represent the FEDSIM CO in the technical phases of the work. The FEDSIM COR will provide no supervisory or instructional assistance to contractor personnel.

The FEDSIM COR is not authorized to change any of the terms and conditions, scope, schedule, and price of the Contract or the TO. Changes in the scope of work will be made only by the FEDSIM CO by properly executed modifications to the Contract or the TO.

6.1.1 CONTRACT ADMINISTRATION

Contracting Officer:

Mark H. Santasiero
GSA FAS AAS FEDSIM
1800 F Street, NW
Washington, D.C. 20405
Telephone: 202-501-4496
Email: mark.santasiero@gsa.gov

Contracting Officer's Representative:

Angelica A. Matias
GSA FAS AAS FEDSIM
1800 F Street, NW
Washington, D.C. 20405
Telephone: (202) 306-5261
Email: angelica.matias@gsa.gov

Technical Point of Contact:

Provided after award.

6.2 INVOICE SUBMISSION

The contractor shall submit Requests for Payments in accordance with the format contained in General Services Administration Acquisition Manual (GSAM) 552.232-25, PROMPT PAYMENT (NOV 2009), to be considered proper for payment. In addition, the following data elements shall be included on each invoice:

Task Order Number: (from GSA Form 300, Block 2)

Paying Number: (ACT/DAC NO.) (From GSA Form 300, Block 4)

FEDSIM Project Number: 2016007GS

Project Title: GSA HR and T&A Systems, Migration and Managed Service Support

The contractor shall certify with a signed and dated statement that the invoice is correct and proper for payment.

The contractor shall provide invoice backup data in accordance with the contract type, including detail such as labor categories, rates, and quantities of labor hours per labor category.

The contractor shall submit invoices as follows:

The contractor shall utilize FEDSIM's electronic Assisted Services Shared Information System (ASSIST) to submit invoices. The contractor shall submit invoices electronically by logging onto the following link (requires Internet Explorer to access the link):

https://portal.fas.gsa.gov

Log in using your assigned ID and password, navigate to the order against which you want to invoice, click the Invoices and Acceptance Reports link in the left navigator, and then click the Create New Invoice button. The AASBS Help Desk should be contacted for support at 877-472-4877 (toll free) or by email at AASBS.helpdesk@gsa.gov. By utilizing this method, no paper copy of the invoice shall be submitted to GSA FEDSIM or the GSA Finance Center. However, the FEDSIM COR may require the contractor to submit a written "hardcopy" invoice with the client's certification prior to invoice payment. A paper copy of the invoice is required for a credit.

6.3 INVOICE REQUIREMENTS

The contractor shall submit a draft copy of an invoice to the client POC for review prior to its submission to GSA. The draft invoice shall not be construed as a proper invoice in accordance with FAR 32.9 and GSAM 532.9.

If the TO has different contract types, each should be addressed separately in the invoice submission.

The final invoice is desired to be submitted within six months of project completion.

6.3.1 TIME-AND-MATERIAL (T&M) CLINS (FOR LABOR)

The contractor may invoice monthly on the basis of cost incurred for the T&M CLINs. The invoice shall include the period of performance covered by the invoice and the CLIN number and title. All hours and costs shall be reported by CLIN element (as shown in Section 1 – Supplies or Services and Price/Costs), by contractor employee, and shall be provided for the current billing month and in total from project inception to date. The contractor shall provide the invoice data in spreadsheet form with the following detailed information. The listing shall include separate columns and totals for the current invoice period and the project to date.

a. Employee name (current and past employees)
b. Employee company labor category
c. Employee labor category
d. Monthly and total cumulative hours worked
e. Corresponding ceiling rate
f. Cost incurred not billed

6.3.2 FIRM-FIXED-PRICE (FFP) CLINS

The contractor may invoice as stated in Section 1 – Supplies or Services and Price/Costs for the FFP CLINs. The invoice shall include the period of performance covered by the invoice and the CLIN number and title. All costs shall be reported by CLIN element (as shown in Section 1 – Supplies or Services and Price/Costs) and shall be provided for the current invoice and in total from project inception to date. The contractor shall provide the invoice data in spreadsheet form with the following detailed information. The listing shall include separate columns and totals for the current invoice period and the project to date.

a. FFP (period of performance – as stated in Section 1 – Supplies or Services and Price/Costs)

6.3.3 OTHER DIRECT COSTS (ODCs)

The contractor may invoice monthly on the basis of cost incurred for the ODC CLINs. The invoice shall include the period of performance covered by the invoice and the CLIN number and title. In addition, the contractor shall provide the following detailed information for each invoice submitted, as applicable. Spreadsheet submissions, in MS Excel format, are required.

a. ODCs purchased
b. Date delivery accepted by the Government
c. Associated CLIN
d. Project-to-date totals by CLIN
e. Cost incurred not billed
f. Remaining balance of each CLIN
g. Indirect Handling Rate

All cost presentations provided by the contractor shall also include Overhead charges, General and Administrative charges and Fee in accordance with the contractor's Defense Contract Audit Agency (DCAA) cost disclosure statement.

6.3.4 TRAVEL

Contractor costs for travel will be reimbursed at the limits set in the following regulations (see FAR 31.205-46):

a. Joint Travel Regulation (JTR) - prescribed by the GSA, for travel in the contiguous U.S.
b. Federal Travel Regulation (FTR) Volume 2, Department of Defense (DoD) Civilian Personnel, Appendix A - prescribed by the DoD, for travel in Alaska, Hawaii, and outlying areas of the U.S.

The contractor may invoice monthly on the basis of cost incurred for cost of travel comparable with the JTR/FTR. The invoice shall include the period of performance covered by the invoice, the CLIN number and title. Separate worksheets, in MS Excel format, shall be submitted for travel.

CLIN/Task Total Travel: This invoice information shall identify all cumulative travel costs billed by CLIN/Task. The current invoice period's travel details shall include separate columns and totals and include the following:

a. Travel Authorization Request identifier, approver name, and approval date

b. Current invoice period
c. Names of persons traveling
d. Number of travel days
e. Dates of travel
f. Number of days per diem charged
g. Per diem rate used
h. Total per diem charged
i. Transportation costs (rental car, air fare, etc.)
j. Total charges
k. Explanation of variances exceeding 10 percent of the approved versus actual costs
l. Indirect handling rate

All cost presentations provided by the contractor shall also include Overhead charges and General and Administrative charges in accordance with the contractor's DCAA cost disclosure statement.

7.1 KEY PERSONNEL

The following are the minimum personnel who shall be designated as "Key." The Government does not intend to dictate the composition of the ideal team to perform this TO.

a. Program Manager (PM)
b. Migration Manager
c. Functional Lead
d. Business Process Realignment (BPR) Lead
e. Managed Services Lead
f. Technical Lead
g. Enhancement Lead

The Government desires that Key Personnel be assigned for the duration of the TO. Key Personnel may be replaced or removed subject to Section 7.1.8 - Key Personnel Substitution.

7.1.1 PROGRAM MANAGER (PM)

The PM shall be responsible for all activities through final deployment of the HR and T&A solution and cutover to production.

It is required that the PM has the following qualifications:

a. 10 years of experience managing and supervising employees of various labor categories and skills in projects similar in size and scope as referenced under this RFQ.

It is desired that the PM has the following qualifications:

a. 15 years of experience managing complex HR system implementation projects of a nature similar in size (or larger) and scope as referenced under this RFQ.
b. 15 years of experience in leadership of complex tasks, including review of work products and deliverables for correctness, compliance with industry best practices, and Federal Government standards.
c. 15 years of experience translating RFQ requirements into project plans and milestones, directing and implementing plans, and presenting formal project status/plan briefings to Government managers.

7.1.2 MIGRATION MANAGER

The contractor shall provide a Migration Manager who shall focus on the initial pre-migration preparation, migration, and stabilization activities. The Migration Manager shall be the primary POC through which communications, work assignments, and technical direction flow between GSA and the contractor during the initial migration phase. The Migration Manager shall also backup the PM as needed to ensure continuous senior level oversight of the program and interaction with the customer.

It is required that the Migration Manager has the following qualifications:

a. Minimum of 10 years of experience managing large, complex, enterprise system migration projects (greater than 20,000 users).

b. Experience managing at least one Federal migration project.

It is desired that the Migration Manager has the following qualifications:

a. Minimum of five years of experience migrating an in-house enterprise system to a Software as a Service platform utilizing a COTS software product or migrating HR and T&A systems from one Software as a Service vendor to another.
b. Experience managing at least one Federal HR and T&A migration project using the proposed solution.
c. Experience managing system migrations or system development projects in a Federal multi-customer fee-for-service environment.

7.1.3 FUNCTIONAL LEAD

The contractor shall provide a Functional Lead who shall focus on pre-migration, migration, and stabilization activities. The focus of the Functional Lead would be Fit/Gap analysis, proof of concept, testing and business configuration of the systems.

It is required that the Functional Lead has the following qualifications:

a. Minimum of 10 years of experience leading the functional components of large, complex migration projects, of which five years should be in a Federal environment.
b. Experience leading fit/gap analysis efforts in the HR business domain.

It is desired that the Functional Lead has the following qualifications:

a. Experience migrating in-house enterprise HR and T&A systems to the proposed HR and T&A systems solution or migrating HR and T&A systems from one Software as a Service vendor to another
b. Experience migrating an in-house enterprise system to a Software as a Service platform.
c. In-depth knowledge of the HR business domain.

7.1.4 BUSINESS PROCESS REALIGNMENT (BPR) LEAD

The contractor shall provide a BPR Lead who shall focus on BPR activities. The BPR Lead shall offer process and functional expertise and lead any BPR-related work.

It is required that the BPR Lead has the following qualifications:

a. Minimum of five years of experience leading the functional BPR components of large, complex migration projects, of which three years should be in a Federal environment.
b. Experience leading business process realignment efforts in the HR domain.

It is desired that the BPR Lead has the following qualifications:

a. Experience migrating in-house enterprise HR and T&A systems to the proposed HR and T&A systems solution or migrating HR and T&A systems from one Software as a Service vendor to another.
b. In-depth knowledge of the HR business domain.
c. Experience migrating an in-house enterprise system to a Software as a Service platform.

7.1.5 MANAGED SERVICES LEAD / PM

The contractor shall provide a Managed Services Lead, post migration, who shall focus on operating and maintaining all aspects of the environments. The Managed Services Lead shall be the primary POC through which communications, work assignments, and technical direction flow between GSA and the contractor. **The Managed Services Lead shall assume the responsibilities of the PM, during the post migration phase.**

It is required that the Managed Services Lead has the following qualifications:

a. Minimum of 10 years of experience managing large complex enterprise systems in a Software as a Service environment.
b. Experience transitioning from a configuration/development mode of operation, through stabilization, to steady state mode of operation.

It is desired that the Managed Services Lead has the following qualifications:

a. Experience in multiple IT platforms and architecture integration.
b. Experience managing operations for enterprise systems environments using the proposed HR and T&A systems solution.
c. Experiencing in overseeing incident management and help desk operations.

7.1.6 TECHNICAL LEAD

The contractor shall provide a Technical Lead who shall be responsible for all technical components of the work (e.g. conversion programs, interfaces, technical system configurations, security). The Technical Lead shall be responsible for technical system configuration for GSA and its four customers.

It is required that the Technical Lead has the following qualifications:

a. Minimum of 12 years of overall technical experience
b. Minimum of eight years of experience leading technical components of large, complex migration projects, four year of which were in a Federal environment.

It is desired that the Technical Lead has the following qualifications:

a. Demonstrated expertise in large integrated systems with HR application and technology architectures and platforms in an integrated environment, such as Security, data exchange technologies, development of interfaces and any extensions, supporting testing of these components.
b. Experience providing technical support and guidance during the configuration through implementation phases of large complex migration or system integration projects.
c. Experience in the software and technical architecture used in the proposed HR and T&A systems solutions.

7.1.7 ENHANCEMENT LEAD

The contractor shall provide an Enhancement Lead who will perform work related to the future development efforts, new software migrations, new entity migrations, release implementation and other development efforts that occur during GSA's managed services phase. During the

managed services Phase, the Enhancement Lead shall be responsible for enhancements and future systems and services through which communications, work assignments, and technical direction flow between GSA and the vendor. The Enhancement Lead shall be available to plan, direct, and control the overall management and operational functions. The Enhancement Lead will also backup the Managed Services lead as needed to ensure continuous senior level oversight and interaction with the customer.

It is required that the Enhancement Lead has the following qualifications:

a. Minimum of 10 years of experience managing large, complex, enterprise system migration projects (greater than 20,000 users).

It is desired that the Enhancement Lead has the following qualifications:

a. Five years' experience managing system migration or system development projects in a Federal environment.
b. Minimum of five years of experience migrating an in-house enterprise system to a Software as a Service platform.
c. Experience managing migration and development projects using the proposed HR and T&A systems solution.

7.1.8 KEY PERSONNEL SUBSTITUTION

The contractor shall not replace any personnel designated as Key Personnel without the written concurrence of the CO. Prior to utilizing other than personnel specified in quotes in response to a RFQ, the contractor shall notify the FEDSIM CO and the FEDSIM COR of the existing TO. This notification shall be no later than ten calendar days in advance of any proposed substitution and shall include justification (including resume(s) and labor category of proposed substitution(s)) in sufficient detail to permit evaluation of the impact on TO performance.
Substitute personnel qualifications shall be equal to, or greater than, those of the personnel being substituted. If the FEDSIM CO and the FEDSIM COR determine that a proposed substitute personnel is unacceptable, or that the reduction of effort would be so substantial as to impair the successful performance of the work under the TO, the contractor may be subject to default action as prescribed by FAR 52.249-6 Termination (Cost Reimbursement) or FAR 52.249-8, Default (Fixed-Price Supply and Service).

7.2 GOVERNMENT-FURNISHED PROPERTY (GFP) AND INFORMATION (GFI)

7.2.1 GFP

The Government will not provide the contractor with property. The contractor is responsible for providing its own property during the period of performance of this TO.

7.2.2 GFI

The Government will provide all necessary information, data, and documents to the contractor for work required under the TO. The contractor shall use Government-furnished information, data, and documents only for the performance of work under this TO, and shall be responsible for returning all Government-furnished information, data, and documents to the Government at the end of the performance period. The contractor shall not release Government-furnished

information, data, and documents to outside parties without the prior and explicit consent of the CO.

GSA will provide access to GSA specific systems/networks as required for support of requirements via a site-to-site, Virtual Private Network (VPN), or other technology. The contractor shall use GSA-provided software development and test accounts, document and requirements repositories, etc. as required for the development, storage, maintenance, and delivery of products within the scope of this effort.

7.3 SECURITY REQUIREMENTS

The preparation of the deliverables in this contract will be completed at a Sensitive but Unclassified (SBU) level. All contractor personnel that provide support with access to systems and/or data in support of this TO, shall, at a minimum, have an adjudicated National Agency Check with Inquiries (NACI), prior to contract award. An equivalent background investigation may be acceptable. No access shall be given to Government computer information systems and Government sensitive information without a background investigation being verified.

GSA shall sponsor the investigation when deemed necessary.

All GSA contractors that require access to a GSA computer or IT system are contractually subject to all GSA and Federal IT Security standards, policies, and reporting requirements. The contractor shall be responsible for properly protecting all information used, gathered, disclosed, or developed as a result of work under this contract. The contractor shall also protect all Government data by treating information as sensitive. All information gathered or created under this contract shall be considered as confidential information. If contractor personnel must remove any information from the primary work area they should protect it to the same extent they would their proprietary data and/or company trade secrets.

The contractor and all contractor employees assigned for any length of time in support of this procurement action will be required to sign a non-disclosure, restricting any use of inside information as procurement sensitive.

7.3.1 PERSONNEL SECURITY REQUIREMENTS

The contractor shall cooperate with the appropriate GSA officials to obtain building access passes and computer access for all contractor-related personnel assigned to work within any GSA office. The contractor shall conform to any GSA security requirements.

Furnish documentation reflecting favorable adjudication of background investigations for all personnel (including subcontractors) supporting the system. Contractors shall comply with GSA order 2100.1 – IT Security Policy and GSA Order CIO P 2181 – HSPD-12 Personal Identity Verification and Credentialing Handbook. GSA separates the risk levels for personnel working on Federal computer systems into three categories: Low Risk, Moderate Risk, and High Risk.

1. Those contract personnel (hereafter known as “Applicant”) determined to be in a Low Risk position will require a National Agency Check with Written Inquiries (NACI) investigation.
2. Those applicants determined to be in a Moderate Risk position will require either a Limited Background Investigation (LBI) or a Minimum Background Investigation (MBI) based on the FEDSIM CO’s determination.

3. Those Applicants determined to be in a High Risk position will require a Background Investigation (BI).

The FEDSIM CO, through the FEDSIM COR or TPOC will ensure that a completed Contractor Information Worksheet (CIW) for each applicant is forwarded to the Federal Protective Service (FPS) in accordance with the GSA/FPS Contractor Suitability and Adjudication Program Implementation Plan dated 20 February 2007. FPS will then contact each applicant with instructions for completing required forms and releases for the particular type of personnel investigation requested.

Applicants will not be reinvestigated if a prior favorable adjudication is on file with FPS or GSA, there has been less than a one-year break in service, and the position is identified at the same or lower risk level.

Once a favorable FBI Criminal History Check (Fingerprint Check) has been returned, applicants may receive a GSA identity credential (if required) and initial access to GSA information systems. The HSPD-12 Handbook contains procedures for obtaining identity credentials and access to GSA information systems as well as procedures to be followed in case of unfavorable adjudications.

7.3.2 SENSITIVE INFORMATION STORAGE

SBU information, data, and/or equipment shall only be disclosed to authorized personnel on a Need-To-Know basis. The contractor shall ensure that appropriate administrative, technical, and physical safeguards are established to ensure the security and confidentiality of this information, data, and/or equipment is properly protected. When no longer required, this information, data, and/or equipment shall be returned to Government control, destroyed, or held until otherwise directed. Destruction of items shall be accomplished by tearing into small parts, burning, shredding, or any other method that precludes the reconstruction of the material. All sensitive information contained on contractor computers shall be either degaussed or shall use the Department of Defense method of a three time overwrite of the sensitive data.

7.3.3 PROTECTION OF INFORMATION

The contractor shall be responsible for properly protecting all information used, gathered, disclosed, or developed as a result of work under this TO. The contractor shall also protect all Government data by treating information as sensitive. All information gathered or created under this TO shall be considered as SBU information. If contractor personnel must remove any information from the primary work area they should protect it to the same extent they would their proprietary data and/or company trade secrets. The use of this data is subject to the Privacy Act and shall be utilized in full accordance with all rules of conduct as applicable to Privacy Act Information.

7.3.4 REQUIRED POLICIES AND REGULATIONS

Contractors entering into an agreement for services to the GSA and/or its Federal customers shall be contractually subject to all GSA and Federal IT Security standards, policies, and reporting requirements. The contractor shall meet and comply with all GSA IT Security Policies and all applicable GSA and NIST standards and guidelines and other Government-wide laws and regulations for protection and security of IT.

All contractors must comply with the policies below (these documents are all referenced within the GSA IT Security Policy):

a. GSA Information Technology (IT) Security Policy (CIO 2100.1)

b. Homeland Security Presidential Directive-12 (HSPD- 12) Personal Identity Verification and Credentialing (GSA Order CIO 2181.1)

c. GSA Information Technology (IT) General Rules of Behavior (GSA Order CIO 2104.1A)

d. GSA Privacy Act Program (GSA Order CPO 1878.1)

e. GSA IT Security Procedural Guide: Contingency Planning (CIO IT Security 06-29)

f. GSA IT Security Procedural Guide: Managing Enterprise Risk (CIO IT Security 06-30)

g. GSA IT Security Procedural Guide: Plan of Action and Milestones (CIO IT Security 09-44)

h. GSA IT Security Procedural Guide: Continuous Monitoring Program (CIO IT Security 12-66)

Contractors are also required to comply with FIPS, the "Special Publications 800 series" guidelines published by NIST, and the requirements of FISMA outlined below:

a. Federal Information Security Modernization Act of 2014

b. Clinger-Cohen Act of 1996 also known as the "Information Technology Management Reform Act of 1996."

c. Privacy Act of 1974 (5 U.S.C. § 552a).

d. Homeland Security Presidential Directive (HSPD-12), "Policy for a Common Identification Standard for Federal Employees and Contractors"

e. Office of Management and Budget (OMB) Circular A-130, "Management of Federal Information Resources," and Appendix III, "Security of Federal Automated Information Systems", as amended.

f. OMB Memorandum M-04-04, "E-Authentication Guidance for Federal Agencies."

g. FIPS PUB 199, "Standards for Security Categorization of Federal Information and Information Systems."

h. FIPS PUB 200, "Minimum Security Requirements for Federal Information and Information Systems."

i. FIPS PUB 140-2, "Security Requirements for Cryptographic Modules."

j. NIST Special Publication 800-18, "Guide for Developing Security Plans for Federal Information Systems."

k. NIST Special Publication 800-30 Revision 1, "Guide for Conducting Risk Assessments."

l. NIST Special Publication 800-34 Revision 1, "Contingency Planning Guide for Information Technology Systems."

m. NIST Special Publication 800-37 Revision 1, "Guide for Applying the Risk Management Framework to Federal Information Systems: A Security Lifecycle Approach"

n. NIST Special Publication 800-47, "Security Guide for Interconnecting Information Technology Systems."

o. NIST Special Publication 800-53 Revision 4, "Security and Privacy Controls for Federal Information Systems and Organizations."

p. NIST Special Publication 800-53A Revision 4, "Assessing Security and Privacy Controls in Federal Information Systems and Organizations: Building Effective Assessment Plans."

7.3.4.1 SECURITY COMPLIANCE REQUIREMENTS

FIPS 200, "Minimum Security Requirements for Federal Information and Information Systems," is a mandatory Federal standard that defines the minimum security requirements for Federal information and information systems in 17 security-related areas. Contractor systems supporting GSA and its customers must meet the minimum security requirements through the use of the security controls in accordance with NIST Special Publication 800-53 Revision 4, and "Recommended Security Controls for Federal Information Systems."

To comply with the Federal standard, GSA must determine the security category of the information and information system in accordance with FIPS 199, "Standards for Security Categorization of Federal Information and Information Systems," and then the contractor shall apply the appropriately tailored set of Low, Moderate, or High impact baseline security controls in NIST 800-53, as determined by GSA.

NIST 800-53 controls requiring organization-defined parameters (i.e., password change frequency) shall be consistent with GSA specifications. The GSA-specified control parameters and supplemental guidance defining more specifically the requirements per FIPS 199 impact level are provided in Appendix A, of this document.

The contractor shall use GSA technical guidelines, NIST guidelines, Center for Internet Security (CIS) guidelines (Level 1), or industry best practice guidelines in hardening its systems.

7.3.4.2 ESSENTIAL SECURITY CONTROLS

All NIST 800-53 R4 controls must be implemented as per the applicable FIPS 199 Low, Moderate, or High baseline. The ensuing table identifies essential security controls from the respective baselines to highlight their importance and ensure they are implemented. The contractor shall make the proposed system and security architecture of the information system available to the Security Engineering Division, in the Office of the Chief Information Security Officer for review and approval before commencement of system build (architecture, infrastructure, and code).

Control ID	Control Title	Baseline	GSA Implementation Guidance
AC-2	Account Management	L, M, H	
AC17 (3)	Remote Access | Managed Access Control Points	M, H	The information system routes privileged authentication traffic to external hosted infrastructures / applications through GSAs managed network access control points to subject to the Trusted Internet Connections (TIC) and Einstein monitoring.
AU-2	Audit Events	L, M, H	Information systems shall implement audit configuration requirements including but not limited to: Successful and unsuccessful Account logon events, account management events, object access, policy change, privilege functions, process tracking, and system events. Web applications should log all admin activity, authentication checks, authorization checks, data deletions, data access, data changes, and permission changes. Web applications should log all admin activity, authentication checks, authorization checks, data deletions, data access, data changes, and permission changes.
CM-6	Configuration Settings	L, M, H	Information systems, including vendor owned / operated systems on behalf of GSA, shall configure their systems in agreement with GSA technical guidelines, NIST guidelines, Center for Internet Security guidelines (Level 1), or industry best practice guidelines, as deemed appropriate.
CP-7	Alternative Processing Site	M, H	FIPS 199 Moderate and High impact systems must implement processing across geographically-disparate locations to ensure fault tolerance. Amazon Web Services based architectures must implement a multi-region strategy (multiple availability zones in a single region are not sufficient).
CP-8	Telecom Services	M, H	FIP 199 Moderate and High impact information systems must implement alternate telecom services to support resumption when the primary telecommunications capabilities are unavailable at either the primary or alternate processing or storage sites.
IA-2	Identification and Authentication (Organizational Users)	L, M, H	Information systems with an e-authentication assurance level of 2 or above, used by federal employees or contractors must accept federal Personal Identity Verification (PIV) cards and verify them in accordance with guidance in OMB M-11-33.
IA-2 (1)	Identification and Authentication (Organizational Users) | Network Access to **Privileged Accounts**	L, M, H	All information systems shall implement multi-factor authentication for privileged accounts.

Control ID	Control Title	Baseline	GSA Implementation Guidance
IA-2 (2)	Identification and Authentication (Organizational Users) | Network Access to **Non-Privileged Accounts**	M, H	FIPS 199 Moderate and High impact information systems must implement multi-factor authentication for non-privileged accounts.
IA-2 (12)	Identification and Authentication | Acceptance of PIV Credentials	L, M, H	All information systems with an e-authentication assurance level of 2 or above, used by federal employees or contractors must accept federal Personal Identity Verification (PIV) cards and verify them in accordance with guidance in OMB M-11-33.
IA-7	Cryptographic Module Authentication	L, M, H	The information system shall implement FIPS 140-2 compliant encryption modules for authentication functions. Reference: http://csrc.nist.gov/groups/STM/cmvp/documents/140-1/1401vend.htm
MP-4	Media Storage	M, H	Digital media including magnetic tapes, external/removable hard drives, flash/thumb drives, diskettes, compact disks and digital video disks shall be encrypted using a FIPS 140-2 certified encryption module.
MP-5	Media Transport	M, H	Digital media including magnetic tapes, external/removable hard drives, flash/thumb drives and digital video disks shall be encrypted using a FIPS 140-2 certified encryption module during transport outside of controlled areas.
PL-8	Information Security Architecture	M, H	All information system security architectures must be formally reviewed and approved by the Office of the Chief Information Security Officer, Security Engineering Division during the system develop/design stages of the SDLC and prior to Security Assessment and Authorization in agreement with GSA IT Security Procedural 15-70, Security Engineering Framework.
RA-5	Vulnerability Scanning	L, M, H	All information system must complete quarterly OS, web, and database configuration scanning and provide results to the GSA together with POA&Ms.

Control ID	Control Title	Baseline	GSA Implementation Guidance
SC-8 / SC-8(1)	Transmission Confidentiality and Integration	M, H	Implemented encryption algorithms and cryptographic modules shall be FIPS-approved and FIPS 140-2 validated, respectively. o Digital signature encryption algorithms - Reference: (http://csrc.nist.gov/groups/ST/toolkit/digital_signatures.html#Approved o Block cypher encryption algorithms - Reference: http://csrc.nist.gov/groups/ST/toolkit/block_ciphers.html#Approved o Secure hashing algorithms – Reference: http://csrc.nist.gov/groups/ST/toolkit/secure_hashing.html#Approved SSL/TLS implementations shall align with GSA IT Security Procedural Guide 14-69, SSL/TLS Implementation. Systems shall be HTTPS only and implement HSTS.
SC-13	Cryptographic Protection | FIPS Validated Cryptography	L, M, H	Implemented encryption algorithms and cryptographic modules shall be FIPS-approved and FIPS 140-2 validated, respectively. o Digital signature encryption algorithms - Reference: (http://csrc.nist.gov/groups/ST/toolkit/digital_signatures.html#Approved o Block cypher encryption algorithms - Reference: http://csrc.nist.gov/groups/ST/toolkit/block_ciphers.html#Approved o Secure hashing algorithms – Reference: http://csrc.nist.gov/groups/ST/toolkit/secure_hashing.html#Approved
SC-17	PKI Certificates	M, H	Implement appropriate creation, use, and signing of crypto certs in agreement with GSA IT Security Procedural Guide 14-69, SSL/TLS Implementation, OMB Memorandum 05-24, and NIST Special Publications 800-32, NIST 800-63.
SC-18	Mobile Code	M, H	
SC-22	Architecture and Provisioning for Name / Address Resolution Service	L, M, H	Information systems shall be Domain Name System Security Extensions (DNSSEC) compliant as per OMB Memorandum, M-08-23, which requires all Federal Government departments and agencies that have registered and are operating second level .gov to be DNSSEC.

Control ID	Control Title	Baseline	GSA Implementation Guidance
SC-28 (1)	Protection of Information at Rest | Cryptographic Protection	GSA Required – For systems with Personally Identifiable Information Only	System bearing PII must implement protect information at rest. At a minimum, fields bearing PII data must be encrypted with field level encryption. Encryption algorithms shall be FIPS-approved; implemented encryption modules shall be FIPS 140-2 validated.
SI-2	Flaw Remediation	L, M, H	All projects and systems must be adequately tested for flaws; all Moderate, High, and Critical risk findings must be remediated prior to go-live. Post go-live, All critical and high vulnerabilities identified must be mitigated within 30 days and all moderate vulnerabilities mitigated within 90 days.
SI-3	Malicious Code Protection	L, M, H	
SI-4	Information System Monitoring	L, M, H	
SI-10	Information Input Validation	M, H	All system accepting input from end users must validate the input in accordance to industry best practices and published guidelines, including Web Application Security Guide: (CIO-IT Security-07-35) Rev. 2 - 01/16/2008, and OWASP Top 10 Web Application Security Vulnerabilities
SA-22	Unsupported System Components	GSA Required	All systems must be comprised of software and hardware components that are fully supported in terms of security patching for the anticipated life of the system.

7.4 ORGANIZATIONAL CONFLICT OF INTEREST AND NON-DISCLOSURE REQUIREMENTS

7.4.1 ORGANIZATIONAL CONFLICT OF INTEREST (OCI)

a. If a contractor is currently performing work, has been performed, or anticipates performing work that creates or represents an actual or potential OCI, the contractor shall immediately disclose this actual or potential OCI to GSA in accordance with FAR Subpart 9.5. The nature of the OCI may involve the prime contractor or subcontractors of any tier.

b. The contractor is required to complete and sign an OCI Statement (see Section 9 – List of Attachments. The contractor must represent either that (1) It is not aware of any facts which create any actual or potential OCI relating to the award of this contract, or (2) It has included information in its proposal, providing all current information bearing on the existence of any actual or potential OCI and has included a mitigation plan in accordance with paragraph (c) below.

c. If a contractor with an actual or potential OCI believes the conflict can be avoided, neutralized, or mitigated, the contractor shall submit a mitigation plan to the Government for review.
d. In addition to the mitigation plan, the FEDSIM CO may require further information from the contractor. The FEDSIM CO will use all information submitted by the contractor, and any other relevant information known to GSA, to determine whether an award to the contractor may take place, and whether the mitigation plan adequately avoids, neutralizes, or mitigates the OCI.
e. If any such conflict of interest is found to exist, the FEDSIM CO may determine that the conflict cannot be avoided, neutralized, mitigated or otherwise resolved to the satisfaction of the Government and the contractor may be found ineligible for award. Alternatively, the FEDSIM CO may determine that it is otherwise in the best interest of the United States to contract with the contractor and include the appropriate provisions to avoid neutralize, mitigate, or waive such conflict in the contract awarded.

7.4.2 NON-DISCLOSURE REQUIREMENTS

If the contractor acts on behalf of, or provides advice with respect to any phase of an agency procurement, as defined in FAR 3.104-4, then the contractor shall execute and submit a Corporate Non-Disclosure Agreement (NDA) Form (Section 9 – List of Attachments, Attachment H) and ensure that all its personnel (to include subcontractors and consultants) who will be personally and substantially involved in the performance of the TO:

a. Are listed on a signed Addendum to Corporate Non-Disclosure Agreement (NDA) Form (Section 9 – List of Attachments, Attachment H) prior to the commencement of any work on the TO.
b. Are instructed in the FAR 3.104 requirements for disclosure, protection, and marking of contractor bid or quote information, or source selection information.
c. Are instructed in FAR Part 9 for third-party disclosures when acting in an advisory capacity.

All proposed replacement contractor personnel also must be listed on a signed Addendum to Corporate NDA and be instructed in the requirements of FAR 3.104. Any information provided by contractors in the performance of this TO or obtained from the Government is only to be used in the performance of the TO. The contractor shall put in place appropriate procedures for the protection of such information and shall be liable to the Government for any misuse or unauthorized disclosure of such information by its personnel, as defined above.

7.5 SECTION 508 COMPLIANCE REQUIREMENTS

Unless the Government invokes an exemption, all Electronic and Information Technology (EIT) products and services provided shall fully comply with Section 508 of the Rehabilitation Act of 1973, per the 1998 Amendments, 29 United States Code (U.S.C.) 794d, and the Architectural and Transportation Barriers Compliance Board's Electronic and Information Technology Accessibility Standards at 36 Code of Federal Regulations (CFR) 1194. The contractor shall identify all EIT products and services provided, identify the technical standards applicable to all products and services proposed, and state the degree of compliance with the applicable standards (Section 9, Attachment I). Additionally, the contractor must clearly indicate where the

information pertaining to Section 508 compliance can be found (e.g., Vendor's or other exact web page location). The contractor must ensure that the list is easily accessible by typical users beginning at time of award.

7.6 PURCHASING SYSTEMS

The objective of a contractor purchasing system assessment is to evaluate the efficiency and effectiveness with which the contractor spends Government funds and complies with Government policy with subcontracting.

Prior to the award of a TO, the CO shall verify the validity of the contractor's purchasing system. Thereafter, the contractor is required to certify to the CO no later than 30 calendar days prior to the exercise of any options the validity of its purchasing system. Additionally, if reviews are conducted of the purchasing system after the exercise of the option, the contractor shall provide the results of the review to the CO within ten workdays from the date the results are known to the contractor.

7.7 TRAVEL

7.7.1 TRAVEL REGULATIONS

Contractor costs for travel will be reimbursed at the limits set in the following regulations (see FAR 31.205-46):

a. Federal Travel Regulations (FTR) - prescribed by the GSA, for travel in the contiguous U.S.
b. Joint Travel Regulations (JTR), Volume 2, Department of Defense (DoD) Civilian Personnel, Appendix A - prescribed by the DoD, for travel in Alaska, Hawaii, and outlying areas of the U.S.

7.7.2 TRAVEL AUTHORIZATION REQUESTS (TAR)

Before undertaking travel to any Government site or any other site in performance of this Contract, the contractor shall have this travel approved by, and coordinated with, the FEDSIM COR (Section 9, Attachment E). Notification shall include, at a minimum, the number of persons in the party, traveler name, destination, duration of stay, purpose, and estimated cost. Prior to any long-distance travel, the contractor shall prepare a Travel Authorization Request (TAR) for Government review and approval. Long-distance travel will be reimbursed for cost of travel comparable with the FTR.

Requests for travel approval shall:

a. Be prepared in a legible manner.
b. Include a description of the travel proposed including a statement as to purpose.
c. Be summarized by traveler.
d. Identify the TO number.
e. Identify the CLIN associated with the travel.
f. Be submitted in advance of the travel with sufficient time to permit review and approval.

The contractor shall use only the minimum number of travelers and rental cars needed to accomplish the task(s). Travel shall be scheduled during normal duty hours whenever possible.

7.8 ODCs

The Government may require the contractor to purchase hardware, software, and related supplies critical and related to the services being acquired under the TO. Such requirements will be identified at the time a RFQ is issued or may be identified during the course of a TO by the Government or the contractor. If the contractor initiates a purchase within the scope of this TO and the prime contractor has an approved purchasing system, the contractor shall submit to the FEDSIM COR a Request to Initiate Purchase (RIP) (Section 9, Attachment G). If the prime contractor does not have an approved purchasing system, the contractor shall submit to the FEDSIM CO a Consent to Purchase (CTP) (Section 9, Attachment F). The RIP and CTP shall include the purpose, specific items, estimated cost, cost comparison, and rationale. FAR 51 deviation allows for contractors to procure items (including IT equipment) from the GSA Schedule and GSA Global Supply Programs when deemed appropriate for fulfillment of agency requirements. Those items procured using the FAR 51 deviation must be T&M/LH. If FAR 51 deviation authority is used, the contractor shall submit an RIP, and the FEDSIM CO will issue written authorization to the contractor in accordance with FAR 51.102. The contractor shall not make any purchases without an approved RIP from the FEDSIM COR or an approved CTP from the FEDSIM CO and without complying with the requirements of Section 7.9, Commercial Supplier Agreements.

7.9 COMMERCIAL SUPPLIER AGREEMENTS

7.9.1 The Government understands that commercial software tools that may be purchased in furtherance of this TO may be subject to commercial agreements which may take a variety of forms, including without limitation licensing agreements, terms of service, maintenance agreements, and the like, whether existing in hard copy or in an electronic or online format such as "clickwrap" or "browsewrap" (collectively, "Supplier Agreements"). For purposes of this TO, the Supplier Agreements are “collateral agreements” within the meaning of the FAR clause at 52.227-14(c)(2).

7.9.2 The contractor shall ensure that any proposed Supplier Agreements allow the associated software and services to be used as necessary to achieve the objectives of this TO. The contractor shall provide all applicable Supplier Agreements to the FEDSIM CO prior to purchase and shall cooperate with the Government, including negotiations with the licensor as appropriate, to ensure compliance with this Section. Without limiting the generality of the foregoing, a compliant Supplier Agreement shall permit all of the following at no extra charge to the Government: (a) access and use by support contractors, including a successor contractor upon termination or expiration of this TO; (b) access by Federal, state and local law enforcement agencies; (c) transfer to a different data center and/or a successor contractor’s cloud; and (d) the creation of derivative works that shall be subject to at least the same rights as set forth in subparagraphs (a) through (c) above. The above rights constitute “other rights and limitations” as contemplated in subparagraph (d) of the FAR clause at 52.227-14, Rights In Data – General (May 2014), Alternate III (Dec 2007).

7.10 INTELLECTUAL PROPERTY RIGHTS

The existence of any patent, patent application or other intellectual property right that encumbers any deliverable must be disclosed in writing on the cover letter that accompanies the delivery. If no such disclosures are provided, the data rights provisions in FAR 52.227-14 apply. The Software Agreements referenced in Section 7.9, amended as contemplated therein, shall be deemed to constitute such disclosure with regard to their associated commercial software tools and shall prevail over any inconsistent provision in FAR 52.227-14 to the extent of such inconsistency.

7.11 ENERGY STAR AND FEMP-DESIGNATED ENERGY EFFICIENT PRODUCTS

The Energy Policy Act (EPAct) of 2005 requires Federal agencies to purchase Energy Star and Federal Energy Management Program (FEMP)-designated energy efficient products. The contractor shall provide products that earn the Energy Star and meet the Energy Star specifications for energy efficiency. The contractor is encouraged to visit energystar.gov for complete product specifications and updated lists of qualifying products.

Additionally, the Energy Independence and Security Act of 2007 (EISA) requires Federal agencies to purchase products that use low wattage during standby mode. The contractor shall use low wattage products wherever possible or as required under this TO.

The Electronic Product Environmental Assessment Tool (EPEAT) was created to define what it means for electronic products to be “environmentally preferable. The EPEAT standard has three tiers: Bronze, Silver, and Gold. Bronze means the product meets the mandatory criteria, Silver means the product meets the mandatory criteria plus 50 percent of the optional criteria, and Gold means the products meets the mandatory criteria plus 75 percent of the optional criteria. GSA’s policy is to purchase EPEAT-Silver products and encourages its contractors to do the same. The contractor shall ensure that for those products covered by an EPEAT standard, 95 percent of the products are EPEAT-registered.

7.12 NEWS RELEASE

The offeror shall not make any news release pertaining to this procurement without prior Government approval and only in coordination with the FEDSIM CO.

8.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This TO incorporates one or more clauses by reference with the same force and effect as if they were given in full text. Upon request the CO will make their full text available. Also, the full text of a provision may be accessed electronically at the FAR website:

http://www.acquisition.gov/far/

Clause No	Clause Title	Date
52.203-13	Contractor Code of Business Ethics and Conduct	(Oct 2015)
52.203-14	Display of Hotline Posters (fill in or provide link to client's posters)	(Oct 2015)
52.203-17	Contractor Employee Whistleblower Rights and Requirement to Inform Employees of Whistleblower Rights	(Apr 2014)
52.204-7 (Provision)	System for Award Management	(Jul 2013)
52.204-9	Personal Identity Verification of Contractor Personnel	(Jan 2011)
52.204.10	Reporting Executive Compensation and First Tier Subcontract Awards	(Oct 2015)
52.204-13	System for Award Management Maintenance	(Jul 2013)
52.204-14	Service Contract Reporting Requirements	(Jan 2014)
52.215-21	Requirements for Cost or Pricing Data or Information Other than Cost or Pricing Data – Modifications	(Oct 2010)
52.215-22	Limitations on Pass-Through Charges- Identification of Subcontractor Effort	(Oct 2009)
52.215-23	Limitations on Pass-Through Charges	(Oct 2009)
52.223-15	Energy Efficiency in Energy Consuming Products	(Dec 2007)
52.223-16	Acquisition of EPEAT®-Registered Personal Computer Products	(Oct 2015)
52.224-1	Privacy Act Notification	(Apr 1984)
52.224-2	Privacy Act	(Apr 1984)
52.225-13	Restrictions on Certain Foreign Purchases	(Jun 2008)
52.227-14	Rights in Data – General	(Dec 2007)
52.227-14	Rights In Data – General Alternate II or III	(May 2014)
52.227-15	Representation of Limited Rights Data and Restricted Computer Software	(Dec 2007)
52.232-18	Availability of Funds	(Apr 1984)
52.232-20	Limitation of Cost	(Apr 1984)

Clause No	Clause Title	Date
52.232-22	Limitation of Funds	(Apr 1984)
52.239-1	Privacy or Security Safeguards	(Aug 1996)
52.244-6	Subcontracts for Commercial Items	(Jun 2016)
52.246-25	Limitation of Liability – Services	(Feb 1997)
52.247-67	Submission of Transportation Documents for Audit see Section G	(Feb 2006)
52.249-14	Excusable Delays	(Apr 1984)
52.251-1	Government Supply Sources	(Apr 2012)

8.1.1 CLAUSES INCORPORATED BY FULL TEXT

52.217-8 OPTION TO EXTEND SERVICES (NOV 1999)

The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed 6 months. The Contracting Officer may exercise the option by written notice to the Contractor within **30 days** of the end of the period of performance.

(End of clause)

52.217-9 OPTION TO EXTEND THE TERM OF THE CONTRACT (MAR 2000)

a. The Government may extend the term of this contract by written notice to the Contractor within **30 days;** provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least **60 days** before the contract expires. The preliminary notice does not commit the Government to an extension.
b. If the Government exercises this option, the extended contract shall be considered to include this option clause.
c. The total duration of this contract, including the exercise of any options under this clause, shall not exceed **126 months**.

(End of clause)

8.2 GENERAL SERVICES ADMINISTRATION ACQUISITION MANUAL (GSAM) CLAUSES INCORPORATED BY REFERENCE

The full text of a provision may be accessed electronically at the GSAM website:

https://www.acquisition.gov/gsam/gsam.html

Clause No	Clause Title	Date
552.204-9	Personal Identity Verification Requirements	(Oct 2012)
552.232.25	Prompt Payment	(Nov 2009)

Clause No	Clause Title	Date
552.239-70	Information Technology Security Plan and Security Authorization	(Jun 2011)
552.239-71	Security Requirements for Unclassified Information Technology Resources	(Jan 2012)

9.1 LIST OF ATTACHMENTS

The following attachments are attached, either in full text or electronically at the end of the RFQ.

Attachment	Title
A	COR Appointment Letter (electronically attached .doc)
B	Acronym List
C	Monthly Status Report
D	Problem Notification Report
E	Travel Authorization Template (electronically attached .xls)
F	Consent to Purchase Template (electronically attached .xls)
G	Request to Initiate Purchase Template (electronically attached .xls)
H	Corporate Non-Disclosure Agreement
I	Section 508 Product Accessibility Report
J	Deliverable Acceptance-Rejection Report
K	Current Customer List and Employee Counts
L	HR and T&A System Requirements – (electronically attached .xls)
M	Additional Entity Specific System Requirements - (electronically attached .xls)
N	Performance Measures
O	Interface Requirements - HRT2T-HHS FOH ICD (electronically attached .doc)
P	Interface Requirements – HRT2T-LMS ICD (electronically attached .doc)
Q	Interface Requirements – HRT2T-NCUA ICD (electronically attached .doc)
R	Interface Requirements – HRT2T-NSA ICD (electronically attached .doc)
S	Interface Requirements – HRT2T-OPM OLU ICD (electronically attached .doc)
T	Interface Requirements – HRT2T-PAR ICD (electronically attached .doc)
U	Incremental Funding Chart (electronically attached .xls) (Attached at award)
V	Offeror Q&A Template (To be removed at time of award)
W	Project Staffing Plan Template (To be removed at time of award)
X	Key Personnel Qualification Matrix (To be removed at time of award)
Y	Corporate Experience Template (To be removed at award)
Z	Pricing Workbook (To be removed at award) (electronically attached .xls)
AA	QASP
BB	Interface Requirements – GCIMS ICD (electronically attached .doc)

ATTACHMENT A

COR APPOINTMENT LETTER

(Electronically Attached .doc)

Acronym List

ADP	Automated Data Processing
ALOHA	Authorized Leave and Overtime Help Application
AO	Authorizing Official
ATO	Authority To Operate
BI	Background Investigation
BRM	Business Reference Model
C&A	Certification and Accreditation
CABS	Commissions and Boards
CCB	Change Control Board
CFR	Code of Federal Regulations
CHCO	Chief Human Capital Officers
CIO	Chief Information Officer
CIW	Contractor Information Worksheet
CLIN	Contract Line Item Number
CO	Contracting Officer
CONOPS	Concept of Operations
COOP	Continuity of Operations Plan
COR	Contracting Officer's Representative
COTS	Commercial Off-The-Shelf
CHRIS	Comprehensive Human Resources Integrated System
CIO	Chief Information Officer
CISO	Chief Information Security Officer
CPC	Consolidated Processing Center
CPDF	Central Personnel Data File
CSCA	Contractor Security Control Assessment
CTP	Consent to Purchase
DBMS	Database Management System
DISCO	Defense Industrial Security Clearance Organization
DNSSEC	Domain Name System Security Extensions
eGOV	e-Government
EIT	Electronic and Information Technology
EHRI	Enterprise Human Resources Integration
ETAMS	Electronic Time and Attendance System
FAQs	Frequently Asked Questions
FAR	Federal Acquisition Regulation
FDCC	Federal Desktop Core Configuration
FEA	Federal Enterprise Architecture
FEDSIM	Federal Systems Integration and Management Center

FFP	Firm-Fixed-Price
FIPS	Federal Information Processing Standards
FISMA	Federal Information Security Act
FFP	Firm Fixed Price
FOIA	Freedom of Information Act
FPS	Federal Protective Service
FTR	Federal Travel Regulation
GAO	Government Accountability Office
GFE	Government-Furnished Equipment
GFI	Government-Furnished Information
GSA	General Services Administration
GSAM	General Services Administration Acquisition Manual
GSAR	General Services Administration Regulation
GPPA	Guide to Processing Personnel Actions
GSA PM	GSA Project Manager
HIPAA	Health Insurance Portability and Accountability Act
HR	Human Resources
HR LOB	Human Resources Line of Business
HRIS	Human Resources Information System
HR IT	Human Resources Information Technology
IBF	Financial Administrative Systems Division
IMP	Integrated Master Plan
IMS	Integrated Master Schedule
IOT&E	Independent Operational Test & Evaluation
IPT	Integrated Project Team
ISA	Interconnection Security Agreement
ISSM	Information System Security Manager
ISO	Information Security Officer
IT	Information Technology
ITIL	Information Technology Infrastructure Library
IV&V	Independent Verification and Validation
JFMIP	Joint Financial Management Improvement Program
JTR	Joint Travel Regulation
LBI	Limited Background Investigation
LDS	Labor Distribution System
MBI	Moderate Background Investigation
MOA	Memorandum of Agreement
MOU	Memorandum of Understanding
MS	Microsoft
MSR	Monthly Status Report

NARA	National Archives and Records Administration
NACI	National Agency Check with Written Inquiries
NCUA	National Credit Union Administration
NDA	Non-Disclosure Agreement
NIST	National Institute Standards and Technology
NLT	No Later Than
NFR	Notice of Findings and Recommendations
NOAC	Nature of Action Code
NTE	Not-to-Exceed
NSOC	National Security Operations Center
NTE	Not to Exceed
OCI	Organizational Conflict of Interest
ODC	Other Direct Cost
OE	Other Equipment
OFHR	Oracle Federal Human Resources
OHRM	Office Of Human Resource Management
OMB	U.S. Office of Management and Budget
OPF	Official Personnel Folders
OPM	Office of Personnel Management
OS	Operating System
PAR	Payroll Accounting and Reporting
PDF	Portable Document Format
PIA	Privacy Impact Assessment
PII	Personal Identifiable Data
PIV	Personal Identity Verification
PM	Program Manager
PMA	President's Management Agenda
PMP	Program Management Plan
PNR	Problem Notification Report
POA&M	Plan of Action and Milestones
POC	Point of Contact
PWS	Performance Work Statement
Q&A	Question and Answer
QA	Quality Assurance
QASP	Quality Assurance Surveillance Plan
QCP	Quality Control Plan
RFQ	Request For Quote
RIP	Request to Initiate Purchase
RRB	Railroad Retirement Board
RSD	Requirements Specification Document
RTM	Requirements Traceability Matrix

SBU	Sensitive But Unclassified
SDD	System Design Document
SIC	Security and Investigation Center
SLA	Service Level Agreement
SORN	System of Record Notice
SOP	Standard Operating Procedures
SP	Special Publications
SSC	Shared Service Center
SSP	System Security Plan
T&A	Time and Attendance
T&M	Time and Materials
TBD	To Be Determined
TEB	Technical Evaluation Board
TIC	Trusted Internet Connections
TOA	Task Order Award
TPOC	Technical Point of Contact
USC	United States Code
USIP	United States Institute of Peace
VLTP	Voluntary Leave Transfer Program
VPN	Virtual Private Network
WBS	Work Breakdown Structure
WEBPACC	Web Payroll Accounting Code Changes

ATTACHMENT C

MONTHLY STATUS REPORT FOR (MONTH AND YEAR)

Contractor Name
Task Order Number: XXXXXXX
Prepared by: **XXXXXXX**
Reporting Period: XXXXXXX
Page 1 of **X**

a. **Activities during reporting period, by task** (*Start with a brief description of the task*).

- On-going activities:
- New activities:
- Activities completed:
- Progress to date on all above mentioned activities:

b. **Problems and corrective actions taken** (*Identify issues or concerns and proposed resolutions to address them*).

c. **Personnel gains, losses, and status** (*security clearance, etc*.).

d. **Government actions required**.

e. **Schedule** (*Show major tasks, milestones, and deliverables; planned and actual start and completion dates for each*).

f. **Summary of trips taken, conferences attended, etc.** (A*ttach trip reports to this MSR for reporting period*).

g. **Accumulated invoiced cost for each CLIN up to the previous month**.

h. **Projected cost of each CLIN for the current month**.

i. Contractor Risks and Issues related to managing the contract.

ATTACHMENT D

PROBLEM NOTIFICATION REPORT

TASK ORDER NUMBER: _____ DATE: _____

1. Nature and sources of problem:

2. COR was verbally notified on: (date) _____

3. Is action required by the Government? Yes_____ No_____

4. If YES, describe Government action required and date required:

5. Will problem impact delivery schedule? Yes_____ No_____

6. If YES, identify what deliverables will be affected and extent of delay:

7. Can required delivery be brought back on schedule? Yes_____ No_____

8. Describe corrective action needed to resolve problems:

9. When will corrective action be completed?

10. Are increased costs anticipated? Yes_____ No_____

11. Identify amount of increased costs anticipated, their nature, and define Government responsibility for problems and costs:

ATTACHMENT E

TRAVEL AUTHORIZATION TEMPLATE

(Electronically attached .xls)

ATTACHMENT F

CONSENT TO PURCHASE TEMPLATE

(Electronically attached .xls)

ATTACHMENT G

REQUEST TO INITIATE PURCHASE TEMPLATE

(Electronically attached .xls)

NON-DISCLOSURE AGREEMENT
BETWEEN
U.S. GENERAL SERVICES ADMINISTRATION (GSA)
FEDERAL SYSTEMS INTEGRATION AND MANAGEMENT CENTER (FEDSIM)
AND
[CONTRACTOR]

This agreement, made and entered into this _____ day of _____, 2016 (the "Effective Date"), is by and between GSA and [CONTRACTOR].

WHEREAS, [CONTRACTOR] and GSA FEDSIM have entered into [Contract No.], Task Order No. [INSERT] for services supporting the [CLIENT AGENCY AND PROGRAM/PROJECT NAME];

WHEREAS, [CONTRACTOR] is providing [DESCRIPTION, e.g., consulting/professional IT, engineering] services under the Task Order;

WHEREAS, the services required to support [PROGRAM/PROJECT NAME] involve certain information which the Government considers to be "Confidential Information"[1] as defined herein;

WHEREAS, GSA desires to have [CONTRACTOR]'s support to accomplish the Task Order services and, therefore, must grant access to the Confidential Information;

WHEREAS, [CONTRACTOR] through its work at a Government site may have access to Government systems or encounter information unrelated to performance of the Task Order which also is considered to be Confidential Information as defined herein;

WHEREAS, GSA on behalf of [CLIENT AGENCY] desires to protect the confidentiality and use of such Confidential Information;

NOW, THEREFORE, for and in consideration of the mutual promises contained herein, the parties agree as follows:

1. **Definitions.** "Confidential Information" shall mean any of the following: (1) "contractor bid or proposal information" and "source selection information" as those terms are defined in 41 U.S.C. § 2101; (2) the trade secrets or proprietary information of other companies; (3) other information, whether owned or developed by the Government, that has not been previously made available to the public, such as the requirements, funding or budgeting data of the Government; and *for contracts/orders providing acquisition assistance,* this term specifically includes (4) past performance information, actual/proposed costs, overhead rates, profit, award fee determinations, contractor employee data of offerors/contractors, methods or

[1] This does not denote an official security classification.

procedures used to evaluate performance, assessments, ratings or deliberations developed in an evaluation process, the substance of any discussions or deliberations in an evaluation process, and any recommendations or decisions of the Government unless and until such decisions are publicly announced. This term is limited to unclassified information.

2. **Limitations on Disclosure.** [CONTRACTOR] agrees (and the [CONTRACTOR] Task Order personnel must agree by separate written agreement with CONTRACTOR) not to distribute, disclose or disseminate Confidential Information to anyone beyond the personnel identified in the [ATTACHED ADDENDUM], unless authorized in advance by the GSA Contracting Officer in writing. The Contracting Officer and [CLIENT POC] will review the Addendum to ensure it includes only those individuals to be allowed access to the information. The Addendum, which may be updated from time to time, is approved when signed by the GSA Contracting Officer and [CLIENT POC].

3. **Agreements with Employees and Subcontractors.** [CONTRACTOR] will require its employees and any subcontractors or subcontractor employees performing services for this Task Order to sign non-disclosure agreements obligating each employee/subcontractor employee to comply with the terms of this agreement. [CONTRACTOR] shall maintain copies of each agreement on file and furnish them to the Government upon request.

4. **Statutory Restrictions Relating to Procurement Information.** [CONTRACTOR] acknowledges that certain Confidential Information may be subject to restrictions in Section 27 of the Office of Federal Procurement Policy Act (41 U.S.C. § 2104), as amended, and disclosures may result in criminal, civil, and/or administrative penalties. In addition, [CONTRACTOR] acknowledges that 18 U.S.C. § 1905, a criminal statute, bars an employee of a private sector organization from divulging certain confidential business information unless authorized by law.

5. **Limitations on Use of Confidential Information.** [CONTRACTOR] may obtain Confidential Information through performance of the Task Order orally or in writing. These disclosures or this access to information is being made upon the basis of the confidential relationship between the parties and, unless specifically authorized in accordance with this agreement, [CONTRACTOR] will:

   a) Use such Confidential Information for the sole purpose of performing the [PROGRAM/PROJECT] support requirements detailed in the Task Order and for no other purpose;

   b) Not make any copies of Confidential Information, in whole or in part;

   c) Promptly notify GSA in writing of any unauthorized misappropriation, disclosure, or use by any person of the Confidential Information which may come to its attention and take

all steps reasonably necessary to limit, stop or otherwise remedy such misappropriation, disclosure, or use caused or permitted by a [CONTRACTOR] employee.

6. **Duties Respecting Third Parties.** If [CONTRACTOR] will have access to the proprietary information of other companies in performing Task Order support services for the Government, [CONTRACTOR] shall enter into agreements with the other companies to protect their information from unauthorized use or disclosure for as long as it remains proprietary and refrain from using the information for any purpose other than that for which it was furnished. [CONTRACTOR] agrees to maintain copies of these third party agreements and furnish them to the Government upon request in accordance with 48 C.F.R. § 9.505-4(b).

7. **Notice Concerning Organizational Conflicts of Interest.** [CONTRACTOR] agrees that distribution, disclosure or dissemination of Confidential Information (whether authorized or unauthorized) within its corporate organization or affiliates, may lead to disqualification from participation in future Government procurements under the organizational conflict of interest rules of 48 C.F.R. § 9.5.

8. **Entire Agreement.** This Agreement constitutes the entire agreement between the parties and supersedes any prior or contemporaneous oral or written representations with regard to protection of Confidential Information in performance of the subject Task Order. This Agreement may not be modified except in writing signed by both parties.

9. **Governing Law**. The laws of the United States shall govern this agreement.

10. **Severability.** If any provision of this Agreement is invalid or unenforceable under the applicable law, the remaining provisions shall remain in effect.

In accordance with Public Law No. 108-447, Consolidated Act, 2005, the following is applicable:

> These restrictions are consistent with and do not supersede, conflict with, or otherwise alter the employee obligations, rights, or liabilities created by Executive Order No. 12958; section 7211 of title 5, United States Code (governing disclosures to Congress); section 1034 of title 10, United States Code, as amended by the Military Whistleblower Protection Act (governing disclosure to Congress by members of the military); section 2302(b)(8) of title 5, United States Code, as amended by the Whistleblower Protection Act (governing disclosures of illegality, waste, fraud, abuse or public health or safety threats); the Intelligence Identities Protection Act of 1982 (50 U.S.C. 421 et seq.) (governing disclosures that could expose confidential Government agents); and the statutes which protect against disclosure that may compromise the national security, including sections 641, 793, 794, 798, and 952 of title 18, United States Code, and section 4(b) of the Subversive Activities Act of 1950 (50 U.S.C. 783(b)). The definitions, requirements, obligations, rights, sanctions, and liabilities created by said Executive order and listed statutes are incorporated into this agreement and are controlling.

11. Beneficiaries. If information owned by an individual or entity not a party to this agreement is disclosed or misappropriated by [CONTRACTOR] in breach of this agreement, such information owner is a third party beneficiary of this agreement. However, nothing herein shall create an independent right of action against the U.S. Government by any third party.

IN WITNESS WHEREOF, GSA and [CONTRACTOR] have caused the Agreement to be executed as of the day and year first written above.

UNITED STATES GENERAL SERVICES ADMINISTRATION

_____ _____
Name Date

_____
Contracting Officer

[CONTRACTOR]

_____ _____
Name* Date

_____
Title

*Person must have the authority to bind the company.

SECTION 508 COMPLIANCE

Product Accessibility Template **Contact for more Information:_____** **Date:_____**		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
Section 1194.21 Software Applications and Operating Systems		
Section 1194.22 Web-based internet information and applications		
Section 1194.23 Telecommunications Products		
Section 1194.24 Video and multi-media products		
Section 1194.25 Self-contained Products		
Section 1194.26 Desktop and Portable Computers		
Section 1194.31 Functional Performance Criteria		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) When software is designed to run on a system that has a keyboard, product functions shall be executable from a keyboard where the function itself or the result of performing a function can be discerned textually.		
(b) Applications shall not disrupt or disable activated features of other products that are identified as accessibility features, where those features are developed and documented according to industry standards. Applications also shall not disrupt or disable activated features of any operating system that are identified as accessibility features where the application programming interface for those accessibility features has been documented by the manufacturer of the operating system and is available to the product developer.		
(c) A well defined on-screen indication of the current focus shall be provided that moves among interactive interface elements as the input focus changes. The focus shall be programmatically exposed so that Assistive Technology can track focus and focus changes.		
(d) Sufficient information about a user interface element including the identity, operation and state of the element shall be available to Assistive Technology. When an image represents a program element, the information conveyed by the image must also be available in text.		
(e) When bitmap images are used to identify controls, status indicators, or other programmatic elements, the meaning assigned to those images shall be consistent throughout an application's performance.		
(f) Textual information shall be provided through operating system functions for displaying text. The minimum information that shall be made available is text content, text input caret location, and text attributes.		
(g) Applications shall not override user-selected contrast and color selections and other individual display attributes.		
(h) When animation is displayed, the information shall be displayable in at least one non-animated presentation mode at the option of the user.		
(i) Color-coding shall not be used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.		
(j) When a product permits a user to adjust color and contrast settings, a variety of color selections capable of producing a range of contrast levels shall be provided.		
(k) Software shall not use flashing or blinking text, objects, or other elements		

having a flash or blink frequency greater than 2 Hz and lower than 55 Hz.		
(l) When electronic forms are used, the form shall allow people using Assistive Technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) A text equivalent for every non-text element shall be provided (e.g., via "alt", "longdesc", or in element content).		
(b) Equivalent alternatives for any multimedia presentation shall be synchronized with the presentation.		
(c) Web pages shall be designed so that all information conveyed with color is also available without color, for example from context or markup.		
(d) Documents shall be organized so they are readable without requiring an associated style sheet.		
(e) Redundant text links shall be provided for each active region of a server-side image map.		
(f) Client-side image maps shall be provided instead of server-side image maps except where the regions cannot be defined with an available geometric shape.		
(g) Row and column headers shall be identified for data tables.		
(h) Markup shall be used to associate data cells and header cells for data tables that have two or more logical levels of row or column headers.		
(i) Frames shall be titled with text that facilitates frame identification and navigation		
(j) Pages shall be designed to avoid causing the screen to flicker with a frequency greater than 2 Hz and lower than 55 Hz.		
(k) A text-only page, with equivalent information or functionality, shall be provided to make a web site comply with the provisions of this part, when compliance cannot be accomplished in any other way. The content of the text-only page shall be updated whenever the primary page changes.		
(l) When pages use scripting languages to display content, or to create interface elements, the information provided by the script shall be identified with functional text that can be read by Assistive Technology.		
(m) When a web page requires that an applet, plug-in or other application be present on the client system to interpret page content, the page must provide a link to a plug-in or applet that complies with §1194.21(a) through (l).		
(n) When electronic forms are designed to be completed on-line, the form shall allow people using Assistive Technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.		
(o) A method shall be provided that permits users to skip repetitive navigation links.		
(p) When a timed response is required, the user shall be alerted and given sufficient time to indicate more time is required.		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) Telecommunications products or systems which provide a function allowing voice communication and which do not themselves provide a TTY functionality shall provide a standard non-acoustic connection point for TTYs. Microphones shall be capable of being turned on and off to allow the user to intermix speech with TTY use.		

(b) Telecommunications products which include voice communication functionality shall support all commonly used cross-manufacturer non-proprietary standard TTY signal protocols.		
(c) Voice mail, auto-attendant, and interactive voice response telecommunications systems shall be usable by TTY users with their TTYs.		
(d) Voice mail, messaging, auto-attendant, and interactive voice response telecommunications systems that require a response from a user within a time interval, shall give an alert when the time interval is about to run out, and shall provide sufficient time for the user to indicate more time is required.		
(e) Where provided, caller identification and similar telecommunications functions shall also be available for users of TTYs, and for users who cannot see displays.		
(f) For transmitted voice signals, telecommunications products shall provide a gain adjustable up to a minimum of 20 dB. For incremental volume control, at least one intermediate step of 12 dB of gain shall be provided.		
(g) If the telecommunications product allows a user to adjust the receive volume, a function shall be provided to automatically reset the volume to the default level after every use.		
(h) Where a telecommunications product delivers output by an audio transducer which is normally held up to the ear, a means for effective magnetic wireless coupling to hearing technologies shall be provided.		
(i) Interference to hearing technologies (including hearing aids, cochlear implants, and assistive listening devices) shall be reduced to the lowest possible level that allows a user of hearing technologies to use the telecommunications product.		
(j) Products that transmit or conduct information or communication, shall pass through cross-manufacturer, non-proprietary, industry-standard codes, translation protocols, formats or other information necessary to provide the information or communication in a usable format. Technologies, which use encoding, signal compression, format transformation, or similar techniques shall not remove information needed for access or shall restore it upon delivery.		
(k)(1) Products which have mechanically operated controls or keys shall comply with the following: Controls and Keys shall be tactilely discernible without activating the controls or keys.		
(k)(2) Products which have mechanically operated controls or keys shall comply with the following: Controls and Keys shall be operable with one hand and shall not require tight grasping, pinching, twisting of the wrist. The force required to activate controls and keys shall be 5 lbs. (22.2N) maximum.		
(k)(3) Products which have mechanically operated controls or keys shall comply with the following: If key repeat is supported, the delay before repeat shall be adjustable to at least 2 seconds. Key repeat rate shall be adjustable to 2 seconds per character.		
(k)(4) Products which have mechanically operated controls or keys shall comply with the following: The status of all locking or toggle controls or keys shall be visually discernible, and discernible either through touch or sound.		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
a) All analog television displays 13 inches and larger, and computer equipment that includes analog television receiver or display circuitry, shall be equipped with caption decoder circuitry which appropriately receives, decodes, and displays closed captions from broadcast, cable, videotape, and		

DVD signals. As soon as practicable, but not later than July 1, 2002, widescreen digital television (DTV) displays measuring at least 7.8 inches vertically, DTV sets with conventional displays measuring at least 13 inches vertically, and stand-alone DTV tuners, whether or not they are marketed with display screens, and computer equipment that includes DTV receiver or display circuitry, shall be equipped with caption decoder circuitry which appropriately receives, decodes, and displays closed captions from broadcast, cable, videotape, and DVD signals.		
(b) Television tuners, including tuner cards for use in computers, shall be equipped with secondary audio program playback circuitry.		
(c) All training and informational video and multimedia productions which support the agency's mission, regardless of format, that contain speech or other audio information necessary for the comprehension of the content, shall be open or closed captioned.		
(d) All training and informational video and multimedia productions which support the agency's mission, regardless of format, that contain visual information necessary for the comprehension of the content, shall be audio described.		
(e) Display or presentation of alternate text presentation or audio descriptions shall be user-selectable unless permanent.		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) Self-contained products shall be usable by people with disabilities without requiring an end-user to attach Assistive Technology to the product. Personal headsets for private listening are not Assistive Technology.		
(b) When a timed response is required, the user shall be alerted and given sufficient time to indicate more time is required.		
(c) Where a product uses touch screens or contact-sensitive controls, an input method shall be provided that complies with §1194.23 (k) (1) through (4).		
(d) When biometric forms of user identification or control are used, an alternative form of identification or activation, which does not require the user to possess particular biological characteristics, shall also be provided.		
(e) When products provide auditory output, the audio signal shall be provided at a standard signal level through an industry standard connector that will allow for private listening. The product must provide the ability to interrupt, pause, and restart the audio at anytime.		
(f) When products deliver voice output in a public area, incremental volume control shall be provided with output amplification up to a level of at least 65 dB. Where the ambient noise level of the environment is above 45 dB, a volume gain of at least 20 dB above the ambient level shall be user selectable. A function shall be provided to automatically reset the volume to the default level after every use.		
(g) Color-coding shall not be used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.		
(h) When a product permits a user to adjust color and contrast settings, a range of color selections capable of producing a variety of contrast levels shall be provided.		
(i) Products shall be designed to avoid causing the screen to flicker with a frequency greater than 2 Hz and lower than 55 Hz.		
(j) (1) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: The position of any operable control shall be determined with		

respect to a vertical plane, which is 48 inches in length, centered on the operable control, and at the maximum protrusion of the product within the 48 inch length on products which are freestanding, non-portable, and intended to be used in one location and which have operable controls.		
(j)(2) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: Where any operable control is 10 inches or less behind the reference plane, the height shall be 54 inches maximum and 15 inches minimum above the floor.		
(j)(3) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: Where any operable control is more than 10 inches and not more than 24 inches behind the reference plane, the height shall be 46 inches maximum and 15 inches minimum above the floor.		
(j)(4) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: Operable controls shall not be more than 24 inches behind the reference plane.		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) All mechanically operated controls and keys shall comply with §1194.23 (k) (1) through (4).		
(b) If a product uses touch screens or touch-operated controls, an input method shall be provided that complies with §1194.23 (k) (1) through (4).		
(c) When biometric forms of user identification or control are used, an alternative form of identification or activation, which does not require the user to possess particular biological characteristics, shall also be provided.		
(d) Where provided, at least one of each type of expansion slots, ports and connectors shall comply with publicly available industry standards		
Criteria	**Name of Product and Supporting Features**	**Remarks and explanations**
(a) At least one mode of operation and information retrieval that does not require user vision shall be provided, or support for Assistive Technology used by people who are blind or visually impaired shall be provided.		
(b) At least one mode of operation and information retrieval that does not require visual acuity greater than 20/70 shall be provided in audio and enlarged print output working together or independently, or support for Assistive Technology used by people who are visually impaired shall be provided.		
(c) At least one mode of operation and information retrieval that does not require user hearing shall be provided, or support for Assistive Technology used by people who are deaf or hard of hearing shall be provided		
(d) Where audio information is important for the use of a product, at least one mode of operation and information retrieval shall be provided in an enhanced auditory fashion, or support for assistive hearing devices shall be provided.		
(e) At least one mode of operation and information retrieval that does not require user speech shall be provided, or support for Assistive Technology used by people with disabilities shall be provided.		
(f) At least one mode of operation and information retrieval that does not require fine motor control or simultaneous actions and that is operable with limited reach and strength shall be provided.		

ATTACHMENT J

DELIVERABLE ACCEPTANCE/REJECTION FORM

Dear (insert name of TPOC)

Please review the deliverable identified below, sign and date, and provide any comments either in the space provided or on an attached form. Comments are due by **XX/XX/20XX**.

DELIVERABLE NAME:
AGENCY NAME:
PROJECT NAME:
FEDSIM TASK ORDER/CONTRACT NUMBER:
FEDSIM PROJECT NUMBER:
DELIVERABLE DUE DATE:

I have reviewed the aforementioned document and have:
☐ Accepted it without comments
☐ Accepted it with comments
☐ Rejected it with comments

COMMENTS:

_____ _____
(name) (date)
(title)

NUMBER OF CURRENT CUSTOMERS & EMPLOYEE COUNTS - HR AND PAYROLL SYSTEMS Updated July 5, 2016		
Customer	**Payroll**	**HR**
AGENCIES THAT CAN SELECT ANY SERVICE PROVIDER		
U.S. General Services Administration	**11,206**	**11,206**

CABS THAT MUST BE SUPPORTED BY GSA BY LEGISLATIVE MANDATE		
U.S. AbilityOne Commission (Executive)	29	29
U.S. Election Assistance Commission (Executive)	28	28
National Council on Disability (Executive)	25	25
Marine Mammal Commission (Executive)	23	23
Nuclear Waste Technical Review Board (Executive)	23	23
U.S. Commission on International Religious Freedom (Legislative)	27	27
U.S. Commission for the Preservation of America's Heritage Abroad (Executive)	1	0
World War I Centennial Commission	5	5
SUB-TOTAL	**161**	**160**

ADDITIONAL CABS, AGENCIES, INDEPENDENT GOV'T CORPS CURRENTLY SUPPORTED BY GSA		
Office of Personnel Management (Executive)	5,974	5,974
U.S. Institute of Peace (Executive)	191	191
John F. Kennedy Center for the Performing Arts (Legislative)	43	43
State Justice Institute (Legislative)	2	0
National Credit Union Administration (Executive)	1,225	1,225
Railroad Retirement Board (Executive)	870	870
Medicare Payment Advisory Commission (Legislative)	48	48
Medicaid and CHIP Payment and Access Commission (Legislative)	44	44
Architect of the Capitol for Senate Restaurant Association (Non-Federal)	34	0
U.S. Institute for Environmental Conflict Resolution (Executive) (part of Udall Foundation)	25	0
U.S. China Economic Security Review Commission (Legislative)	27	27
U.S. Interagency Council on Homelessness (Executive)	19	19
Administrative Conference of the United States (Executive)	14	14
Morris K. Udall and Stewart L. Udall Foundation (Executive)	39	39
Appraisal Subcommittee of the Federal Financial Institutions	13	13
Japan-United States Friendship Commission (Executive)	13	13
Vietnam Education Foundation (Executive)	7	7
Dwight Eisenhower Memorial Commission (Legislative)	7	7

Council of the Inspectors General on Integrity & Efficiency (Executive)	9	9
John C. Stennis Center for Public Service (Legislative)	5	0
Delta Regional Authority (Legislative)	4	0
Privacy and Civil Liberties Oversight Board (Executive)	23	23
Barry M. Goldwater Scholarship & Excellence in Education Foundation (Executive)	7	7
Northern Border Regional Commission (Executive)	2	2
Former President Pensions	4	0
SUB-TOTAL	**8,649**	**8,575**
TOTAL GSA AND CUSTOMER AGENCIES AND CABS	**20,016**	**19,941**

ATTACHMENT L

HR and T&A System Requirements

(Electronically attached .xls)

ATTACHMENT M

ADDITIONAL ENTITY SPECIFIC SYSTEM REQUIREMENTS

(Electronically attached .xls)

ATTACHMENT O

PERFORMANCE REQUIREMENTS SUMMARY

The target column uses the following abbreviations:

- [G] = Green
- [Y] = Yellow
- [R] = Red

The ranges for each green, yellow, and red target are abbreviated for simplicity and space considerations (e.g., a metric may show [Y] is >= 95% which includes [G] which is >= 99%). Each range is understood to be mutually exclusive.

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Project Schedule Timeliness: Percentage of milestones completed at agreed-upon dates per project plan	(On time milestones / total milestones) * 100	Reflects the ability of the Provider and agency to work together to complete the project on time. Work that is yellow or red should have a corrective action plan in place to get deficient areas into green.	G 95% - 100% Y 90% - 94% R <= 90%	Monthly
Project Scope: Percentage of approved change requests resolved within approved level of effort estimate	(# CRs where Actual Completion Date <= Estimated Completion date / Total # CRs) * 100	Change requests should be completed within the agreed upon completion time. Prior to execution, the impact and schedule of each CR is approved by the Customer / CCB	G 95% - 100% Y 90% - 94% R <= 90%	Monthly

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Project Risks: High project risks are reviewed at least bi-weekly	Number of risk review meetings held per month	Indicates that the project is actively reviewing risks to ensure that risk triggers have not occurred, or if a risk is triggered that the appropriate mitigation strategy is begun.	G >= 2 Y = 1 R = 0	Monthly
Project Risks: The percentage of risks that become issues	Number of high and medium risks that become an issue by the total number of high and medium risks multiplied by 100 (#High/Medium Risks that become issues / Total # of High/Medium Risks) * 100	Indicator of risks being actively managed and issues being avoided	G < 2% Y 3% - 10% R > 10%	Monthly
Project Issues: The percentage of issues resolved within planned timeframes NOTE – project issues such as actions or risks that become issues. This is not system issues.	(# of issues resolved on time / total issues) * 100	The issue due date will be agreed upon by Customer and Provider and the "on time" will be based on those due dates. The purpose is to ensure proactive management of issues.	G >= 95% Y 90% - 94% R < 90%	Monthly

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Project Quality: The percentage of deliverables (draft / final) accepted by Customer for meeting quality standards.	(# of deliverables accepted / total deliverables) * 100	Deliverables meet quality standards for content. Comments do not constitute rejection. Rejection is determined as unacceptable versus approved with constraints (minor edits).	G >=95% Y 90% - 94% R < 90%	Monthly

Fit-Gap and Configuration of the System

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Requirements Compliance: Meet functional and technical requirements	(# mandatory requirements passing testing / total requirements) *100	Manage the testing of requirements until Green (100%) is achieved	G 100% Y 90% - 99% R <= 90%	Monthly
Data Migration Completeness: Ability to complete data migration	(# of data records completely migrated / total data records) * 100	Manage the conversion of data until Green (100%) is achieved	G 100% Y 90% - 99% R <= 90%	Monthly
Single Sign on (SSO) Completeness: Meet single sign on NOTE: Single Sign on is just a special case of the overall technical requirements	(# SSO requirements passing testing / total requirements) *100	Manage the testing of requirements until Green (100%) is achieved	G 100% Y 90% - 99% R <= 90%	Monthly

Managed Service Support

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Uptime per month: 99.7% during the core hours in the QASP (NOTE: There is a 98% utilization overall in the requirements)	(# of minutes downtime per month /(1020 * # days)) * 100% NOTE – 1020 is the number of minutes from 7AM to 12AM	Provide for a stable system that will allow maximum usage by HR professionals and employees requiring self-service features.	G >= 99.7% Y 97% - 99.6% R < 97%	Quarterly
Errors in Interfaces: Error rate in data transmissions to GSA systems and other related interfaces	(# of failed submissions / total attempts) * 100	Monitor the accuracy of data transfers during operations	G >= 99.7% Y 95 % 99.7% R < 95%	Monthly
Customer Satisfaction: The average survey results	Sum of overall system rating (with 1-5 scale) / Number of respondents	Determine whether the users are happy and the efficiency the system	G > 4 Y 3 – 3.9 R < 3	Monthly
Tier 3 Help Desk Phone Response Time – rate of response to phone calls within 12 hours	(# calls returned within 12 business hours / total calls responded to) * 100	Ensure proper response time to the GSA Help Desk personnel	G > 97% Y 90% - 96.9% R < 90%	Monthly
Tier 3 Help Desk Response Time: rate of response to emails within 48 hours	(# emails returned within 48 hours / total emails responded to) * 100	Shows ability of the Contractor help desk to respond to customer inquiries quickly	G > 97% Y 90% - 96.9% R < 90%	Quarterly
Security Findings The percentage of High Plan of Action and Milestones (POA&M) findings resolved within GSA required timeframes	((# of issues closed for interval) / (# of issues scheduled for interval)) * 100	Ensure proper security of the system and remediation of known issues.	G = 100% Y 95% - 99.9% R < 95%	Monthly

METRIC	CALCULATION	PURPOSE	OBJECTIVE	SUGGESTED INTERVAL
Office of Personnel Management (OPM) regulatory changes or Federally mandated application/table changes: Changes completed by due date.	((# changes completed during interval)/ (# changes required in the interval)) * 100	Ensure timely compliance by GSA with all Federal mandates	G > 97% Y 90% - 96.9% R < 90%	Quarterly
Timely notification of Planned outages: Percentage of notifications provided seven (7) days in advance.	((# notifications provided seven (7) days in advance) / (total planned outages)) * 100	Ensure timely notification to users so they can plan their work accordingly	G > 97% Y 90% - 96.9% R < 90%	Quarterly

ATTACHMENT O

Interface Requirements - HRT2T-HHS FOH ICD

(Electronically attached .doc)

ATTACHMENT P

Interface Requirements – HRT2T-LMS ICD

(Electronically attached .doc)

ATTACHMENT Q

Interface Requirements – HRT2T-NCUA ICD

(Electronically attached .doc)

ATTACHMENT R

Interface Requirements – HRT2T-NSA ICD

(Electronically attached .doc)

ATTACHMENT S

Interface Requirements – HRT2T-OPM OLU ICD

(Electronically attached .doc)

ATTACHMENT T

Interface Requirements – HRT2T-PAR ICD

(Electronically attached .doc)

ATTACHMENT U

Incremental Funding Chart (electronically attached .xls)

(Attached at award)

ATTACHMENT V

Questions and Answers Template

Company Name:
Solicitation Number: GSC-QF0B-16-33040

Note to offerors: Please provide the specific paragraph reference using the Section/sub-Section numbers in the solicitation.

PART #	PARAGRAPH #	PARAGRAPH TITLE	QUESTION	GOVERNMENT RESPONSE

PROJECT STAFFING PLAN TEMPLATE

(Delete at award)

Note: Provide one (1) sheet for the **Base Period** and one (1) sheet for **each Option Period**

Name	Company	Proposed Labor Category	Labor Category Number	Key Personnel (Yes or No)	Qualifications – related to their role on the project, e.g., hw/sw exp. and work exp.	Labor Hours by Task if Appropriate to the Solution				
						Task 1	Task 2	Task 3	Continued	Total
Total Hours by Task Area										

***Only fill in the qualifications the first time the name appears in the tables.**

Key Personnel Qualification Matrix
(To be removed at time of award)

EXAMPLE

The following is an example of how the matrix shall map to Section H of the task order. The example detailed below describes a case in which the task order requires a Senior Network Engineer:

7.1.X Senior Network Engineer

It is desirable that the Senior Network Engineer have significant experience managing the design, development, implementation, testing, and maintenance of large (over 100 servers, 1000 workstations, and 10 locations) local and wide area networks in a secure Federal Government environment. The Senior Network Expert should have IRM experience managing an integrated network with a diversity of users. The individual should be functionally proficient in the operations and maintenance of local, metropolitan, and wide area networks using automated network management tools, responding to both client and user requests for applications assistance and network modifications and enhancements. The Senior Network Engineer should have experience supervising at least thirty network support staff of various job categories and skills. The Senior Network Engineer should have broad-based skills and experience managing the migration of separate networks into single WAN, performing routine system maintenance and troubleshooting, managing the installation of software upgrades, maintaining network performance, and recommending enhancements.

The offeror for this example is proposing John Smith as a Senior IT Analyst. The Key Qualification Matrix would be formatted as follows:

KEY PERSONNEL QUALIFICATIONS MATRIX

Proposed Personnel Name: John Smith
Proposed meets the TO requirements (per 7.1..X) for: Senior Network Engineer
Proposed meets the requirements of the Basic Contract for Labor Category: Senior IT Analyst
Proposed meets the TO Clearance Level requirements: Not a requirement for this position
Proposed person is available to begin work on the following start date: XX/XX/XXXX

Requirements	**Years of Experience**	**Description of qualifications and experience**
Task Order Request Section 7.1.X		
Experience managing the design, development, implementation, testing, and maintenance of large (over 100 servers, 1000 workstations, and 10 locations) local and wide area networks in a secure Federal Government environment		
IRM experience managing an integrated network with a diversity of users		
Functionally proficient in the operations and maintenance of local, metropolitan, and wide area networks using automated network management tools, responding to both client and user requests for applications assistance and network modifications and enhancements		
Experience supervising at least thirty network support staff of various job categories and skills		
Broad-based skills and experience managing the migration of separate networks into a single WAN, performing routine system maintenance and troubleshooting, managing the installation of software upgrades, maintaining network performance, and recommending enhancements		

Note: Multiple pages for qualifications are acceptable.

See page limitations in section **11.7.3 KEY PERSONNEL QUALIFICATION MATRIX.**

END OF EXAMPLE

ATTACHMENT Y

CORPORATE EXPERIENCE SAMPLE TEMPLATE

CORPORATE EXPERIENCE (insert #) Program/Project Title:	Task Order Number:
Dollar value of the cited project:	Period of Performance:
Performing Business Unit:	
Client Agency:	Client Location:
Client POC #1 to contact (name, phone number and email):	Client POC #2 to contact (name, phone number and email):
Role of proposing offeror in the project:	Major deliverables produced
Similar Corporate Experience for each TOR Task Area: 1 – 9 (Also includes subtasks):	
.	

ATTACHMENT Z

PRICING WORKBOOK
(To be removed at award)

(Electronically attached .xls)

QUALITY ASSURANCE SURVEILLANCE PLAN (QASP)

GSC-QF0B-XX-XXXX

Human Resources (HR) and Time and Attendance (T&A) Systems, Migration and Managed Service Support

in support of:

General Services Administration (GSA) Office of Human Resource Management (OHRM)

FEDSIM Project Number 2016007GS

1.0 INTRODUCTION

This Quality Assurance Surveillance Plan (QASP) is pursuant to the requirements listed in the Performance Work Statement (PWS) entitled HR and T&A Systems, Migration and Managed Service Support. This plan sets forth the procedures and guidelines FEDSIM will use in ensuring the required performance standards or services levels are achieved by the contractor.

1.1 PURPOSE

The purpose of the QASP is to describe the systematic methods used to monitor performance and to identify the required documentation and the resources to be employed. The QASP provides a means for evaluating whether the contractor is meeting the performance standards or quality levels identified in the PWS and the contractor's Quality Control Plan (QCP), and to ensure that the Government pays only for the level of services received.

This QASP defines the roles and responsibilities of all members of the Integrated Project Team (IPT), identifies the performance objectives, defines the methodologies used to monitor and evaluate the contractor's performance, describes quality assurance documentation requirements, describes the analysis of quality assurance monitoring results, and provides a Performance Requirements Summary (RFQ Section 9, Attachment N) that includes the method used to improve contractor performance when appropriate.

1.2 PERFORMANCE MANAGEMENT APPROACH

The PWS structures the acquisition around "what" service or quality level is required, as opposed to "how" the contractor should perform the work (i.e., results, not compliance). This QASP will define the performance management approach to monitor and manage the contractor's performance to ensure the expected outcomes or performance objectives communicated in the PWS are achieved. Performance management rests on developing a capability to review and analyze information generated through performance assessment. The ability to make decisions based on the analysis of performance data is the cornerstone of performance management; this analysis yields information that indicates whether expected outcomes for the project are being achieved by the contractor.

Performance management represents a significant shift from the more traditional Quality Assurance (QA) concepts in several ways. Performance management focuses on assessing whether outcomes are being achieved and to what extent versus scrutiny of compliance with the processes used to achieve the outcome. A performance-based approach facilitates the contractor providing an innovative solution within the stated constraints that gives the Government the opportunity to receive outstanding results. A "results" focus provides the contractor flexibility to continuously improve and innovate over the course of the contract as long as the critical outcomes expected are being achieved and/or the desired performance levels are being met.

1.3 PEFORMANCE MANAGEMENT STRATEGY

The contractor is responsible for the quality of all work performed. The contractor measures that quality through the contractor's own Quality Control (QC) program. QC is work output, not workers, and therefore includes all work performed under this contract regardless of whether the work is performed by contractor employees or by subcontractors. The contractor's QCP shall set forth the staffing and procedures for self-inspecting the quality, timeliness, responsiveness, customer satisfaction, and other performance requirements in the PWS. The contractor shall develop and implement a performance management system with processes to assess and report its performance to the designated Government representative. This QASP enables the Government to take advantage of the contractor's QC program.

The Government representative(s) will monitor performance and review performance reports furnished by the contractor to determine how the contractor is performing against communicated performance objectives. The Government will make a determination regarding incentives based on performance measurement metric data and notify the contractor of those decisions. The contractor shall be responsible for making required changes in processes and practices to ensure performance is managed effectively.

2.0 ROLES AND RESPONSIBILITIES

2.1 Contracting Officer (CO)

The CO is responsible for monitoring contract compliance, contract administration, and cost control and for resolving any differences between the observations documented by the Contracting Officer's Representative (COR) and the contractor. The CO will designate one full-time COR as the Government authority for performance management. The number of additional representatives serving as technical inspectors depends on the complexity of the services measured, as well as the contractor's performance, and must be identified and designated by the CO.

2.2 Contracting Officer Representative (COR)

The COR is designated in writing by the CO to act as his or her authorized representative to assist in administering a contract. COR limitations are contained in the written appointment letter. The COR is responsible for technical administration of the project and ensures proper Government surveillance of the contractor's performance. The COR is not empowered to make any contractual commitments or to authorize any contractual changes on the Government's behalf. Any changes that the contractor deems may affect contract price, terms, or conditions shall be referred to the CO for action. The COR will have the responsibility for completing QA monitoring forms used to document the inspection and evaluation of the contractor's work performance. Government surveillance may occur under the inspection of services clause for any service relating to the contract.

3.0 IDENTIFICATION OF REQUIRED PERFORMANCE STANDARDS/QUALITY LEVELS

The required performance standards and/or quality levels are included in the PWS and in RFQ Section 9, Attachment N, "Performance Requirements Summary."

4.0 METHODOLOGIES TO MONITOR PERFORMANCE

4.1 Surveillance Techniques

In an effort to minimize the performance management burden, simplified surveillance methods shall be used by the government to evaluate contractor performance when appropriate. The primary methods of surveillance are:

a. Random sampling, which shall be performed by the COR designated inspector.
b. Inspection: Each month, the COR, shall review the generated documentation and enter summary results into the Quality Assurance Monitoring Form (Exhibit 1).
c. Periodic Inspection: COR typically performs the periodic inspection on a monthly basis.

4.2 Customer Feedback

The contractor is expected to establish and maintain professional communication between its employees and customers. The primary objective of this communication is customer satisfaction. Customer satisfaction is the most significant external indicator of the success and effectiveness of all services provided and can be measured through customer complaints.

Performance management drives the contractor to be customer focused through initially and internally addressing customer complaints and investigating the issues and/or problems. However, the customer always has the option to communicate complaints to the COR, as opposed to the contractor.

Customer complaints, to be considered valid, must set forth clearly and in writing the detailed nature of the complaint, must be signed, and must be forwarded to the COR. The COR will accept those customer complaints and investigate them using the Quality Assurance Monitoring Form: Customer Complaint Investigation, identified in Exhibit 3.

Customer feedback may also be obtained either from the results of formal customer satisfaction surveys or from random customer complaints.

4.3 Acceptable Quality Levels

The Acceptable Quality Levels (AQLs) included in RFQ Section 9, Attachment N, Performance Requirements Summary Table, for contractor performance are structured to allow the contractor to manage how the work is performed. For certain critical activities the desired performance level is established at 100 percent. Other levels of performance are keyed to the relative importance of the task in relation to the overall mission performance.

5.0 QUALITY ASSURANCE DOCUMENTATION

5.1 The Performance Management Feedback Loop

The performance management feedback loop begins with the communication of expected outcomes. Performance standards are expressed in the PWS and assessed using the performance monitoring techniques shown in RFQ Section 9, Attachment N.

5.2 Monitoring Forms

The Government's QA surveillance, accomplished by the COR, will be reported using the monitoring forms in Attachments 2 and 3. The forms, when completed, will document the Government's assessment of the contractor's performance under the contract to ensure that the required results are being achieved.

The COR will retain a copy of all completed QA monitoring forms.

6.0 ANALYSIS OF QUALITY ASSURANCE MONITORING RESULTS

6.1 Determining Performance

The Government shall use the monitoring methods cited to determine whether the performance standards, service levels have been met. If the contractor has not met the minimum requirements, it may be asked to develop a corrective action plan to show how and by what date it intends to bring performance up to the required levels.

6.2 Reporting

At the end of each month, the COR will prepare a written report for the COR summarizing the overall results of the quality assurance surveillance of the contractor's performance. This written report, which includes the contractor's submitted monthly report and the completed quality assurance monitoring forms (Exhibit 1), will become part of the QA documentation. It will enable the Government to support whether the contractor is meeting the performance standards.

6.3 Reviews and Resolution

The COR may require the contractor's project manager, or a designated alternate, to meet with the CO and other Government IPT personnel as deemed necessary to discuss performance evaluation. The COR will define a frequency of in-depth reviews with the contractor, including appropriate self-assessments by the contractor; however, if the need arises, the contractor will meet with the COR as often as required or per the contractor's request. The agenda of the reviews may include:

a. Monthly performance assessment data and trend analysis
b. Issues and concerns of both parties
c. Projected outlook for upcoming months and progress against expected trends, including a corrective action plan analysis

d. Recommendations for improved efficiency and/or effectiveness
e. Issues arising from the performance monitoring processes.

The CO and COR must coordinate and communicate with the contractor to resolve issues and concerns regarding marginal or unacceptable performance.

The CO, COR, and contractor should jointly formulate tactical and long-term courses of action. Decisions regarding changes to metrics, thresholds, or service levels should be clearly documented. Changes to service levels, procedures, and metrics will be incorporated as a contract modification.

EXHIBIT 1

SAMPLE QUALITY ASSURANCE MONITORING FORM

SERVICE or STANDARD: _____

_____

_____

_____

_____

SURVEY PERIOD: _____

SURVEILLANCE METHOD (Check):

❒ Random Sampling ❒ 100% Inspection ❒ Periodic Inspection ❒ Customer Complaint

LEVEL OF SURVEILLANCE (Check):

❒ Monthly ❒ Quarterly ❒ As needed

PERCENTAGE OF ITEMS SAMPLED DURING SURVEY PERIOD: _____ %

ANALYSIS OF RESULTS:

Observed Service Provider Performance Measurement Rate: _____%

Service Provider's Performance (Check): ❒ Meets Standards

❒ Does Not Meet Standards

Narrative of Performance During Survey Period: _____

_____

_____

_____

_____

PREPARED BY: _____ **DATE:** _____

EXHIBIT 2

QUALITY ASSURANCE MONITORING FORM –
CUSTOMER COMPLAINT INVESTIGATION

SERVICE or STANDARD:

_____
_____
_____

SURVEY PERIOD: _____

DATE/TIME COMPLAINT RECEIVED: _____ _____ AM / PM

SOURCE OF COMPLAINT: _____ (NAME)

_____ (ORGANIZATION)

_____ (PHONE NUMBER)

_____ (EMAIL ADDRESS)

NATURE OF COMPLAINT:

_____
_____
_____
_____

RESULTS OF COMPLAINT INVESTIGATION:

_____
_____
_____
_____

DATE/TIME SERVICE PROVIDER INFORMED OF COMPLAINT: _____ _____ AM / PM

CORRECTIVE ACTION TAKEN BY SERVICE PROVIDER:

_____
_____
_____
_____

RECEIVED AND VALIDATED BY: _____

PREPARED BY: _____ **DATE:** _____

ATTACHMENT BB

Interface Requirements – GCIMS ICD

(Electronically attached .doc)

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11.1 FAR 52.252-1 SOLICITATION PROVISIONS INCORPORATED BY REFERENCE (FEB 1998)

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the CO will make the full text available. The offeror is cautioned that the listed provisions may include blocks that must be completed by the offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the offeror may identify the provision by paragraph identifier and provide the appropriate information with its quotation of offer. The solicitation provisions and/or contract clauses are available in either HTML or PDF format at:
https://www.acquisition.gov/far

Clause No	Clause Title	Date
52.215-1	Instructions to Offerors-Competitive Acquisition	(JAN 2004)
52.215-20	Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data – Alternate IV	(OCT 2010)
52.232-38	Submission of Electronic Funds Transfer Information with Offer	(JUL 2013)

SOLICITATION PROVISIONS PROVIDED IN FULL TEXT:

FAR 52.215-20 Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data – Alternate IV (OCT 2010)

(a) Submission of certified cost or pricing data is not required.
(b) Provide information described below:

All data required to be submitted as part of the offeror's quote is described in Sections 11.7, 11.8, 11.9, and 11.10 of this solicitation. The offeror must use the formats for submission of data prescribed in these sections. By submitting a quote, the offeror grants the CO or an authorized representative the right to examine records that formed the basis for the pricing quote. That examination can take place at any time before award. It may include those books, records, documents, and other types of factual data (regardless of form or whether the data are specifically referenced or included in the quote as the basis for pricing) that will permit an adequate evaluation of the proposed price.

11.2 GENERAL INSTRUCTIONS

a. The offeror shall furnish the information required by this solicitation. A Standard Form (SF) 18, "Request for Quotation," completed and signed by the offeror, Block 14, constitutes the offeror's acceptance of the terms and conditions of the proposed TO. Therefore, the SF 18 must be executed by a representative of the offeror authorized to commit the offeror to contractual obligations.
b. The offeror is expected to examine this entire solicitation document including the Contract. Failure to do so will be at the offeror's own risk.

c. The Government may make award based on initial offers received, without discussion of such offers. Quotes shall set forth full, accurate, and complete information as required by this solicitation package (including Attachments). The penalty for making false statements in quotes is prescribed in 18 U.S.C. 1001.
d. An offeror submitting restrictive data will mark it as follows in accordance with the FAR 52.215-1, Instructions to Offerors - Competitive Acquisition, which is incorporated by reference. Clause 52.215-1(e) states: "Offerors that include in their proposals data that they do not want disclosed to the public for any purpose, or used by the Government except for evaluation purposes, shall –
   (1) Mark the title page with the following legend:
   This quote includes data that shall not be disclosed outside the Government and shall not be duplicated, used or disclosed--in whole or in part--for any purpose other than to evaluate this quote or quotation. If, however, a TO is awarded to this offeror as a result of--or in connection with--the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting TO. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to the restriction is contained in sheets (insert numbers or other identification of sheets); and
   (2) Mark each sheet of data it wishes to restrict with the following legend:
   Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this quote."
e. The Government assumes no liability for disclosure or use of unmarked data and may use or disclose the data for any purpose. Unless restricted, information submitted in response to this request may become subject to disclosure to the public pursuant to the provisions of the Freedom of Information Act (5 U.S.C. 551).
f. The authorized negotiator or the signatory of the SF 18 will be notified of the date and time of the oral technical Question and Answer (Q&A) session. The offeror shall provide the name of the individual, the position title, telephone number, fax number, and email address of that individual.

11.3 SUBMISSION OF QUESTIONS

Offerors are requested to submit their questions grouped by solicitation Section and make reference to the particular Section/Subsection number. Questions must be received before the date specified for receipt of questions using the format in Section 9 – List of Attachments, Attachment V. **Questions or requests for extension submitted after the cut-off date will not be considered.**

Any information given to a prospective offeror concerning this solicitation will be furnished promptly to other prospective offerors as an amendment to the solicitation.

11.4 AVAILABILITY OF EQUIPMENT AND SOFTWARE

All commercial hardware and software proposed in response to this solicitation document shall have been formally announced for general release on or before the closing date of the

solicitation. Failure to have equipment or software announced prior to submission of quote may render the offeror's quote unacceptable.

11.5 GENERAL INFORMATION

The total estimated T&M of the TO is between $87 million and $97 million. The estimate does not include FFP Tasks, Long Distance Travel, and ODCs. Any quote that is not within this range shall include an explanation that specifically draws the Government's attention to any unique technical aspects of the quote the offeror would like the Government to consider as the justification for the deviation from the range.

Quotes shall be valid for a period of not less than 120 calendar days from the date of delivery.

11.6 CONTRACTOR SUPPORT DURING TECHNICAL EVALUATION

The Government expects to have contractor support during the evaluation from E3 Federal Solutions, LLC and Business Intelligence, Inc. The prime offeror is encouraged to sign an NDA with E3 Federal Solutions, LLC and Business Intelligence, Inc. for its submission that addresses the written and video technical quotes (see GSAM 503.104-4). An offeror who chooses to enter into an NDA with E3 Federal Solutions, LLC and Business Intelligence, Inc. shall submit its corporate NDA to the respective POC listed below specifically referencing this solicitation. If an NDA is signed, the NDA shall be submitted with the proposal Part I submission. E3 Federal Solutions, LLC and Business Intelligence, Inc. are prohibited from proposing on any work related to GSA HR and T&A Systems, Migration, and Managed Service Support.

E3 Federal Solutions, LLC
POC: Will Fortier
Phone: 202.321.7011
Email: wfortier@e3federal.com

Business Intelligence, Inc.
POC: George Thompson, CEO
Phone: 703-801-4607
Email: tony.thompson@bii-va.com

11.7 SUBMISSION OF OFFERS

Each offer shall be provided to the Government in four Parts and shall contain the following:

a. Part I – Preliminary Written Price Quote Information
b. Part II – Remainder of Written Price Quote
c. Part III – Written Technical Quote
d. Part IV – Video Technical Quote Presentation

The Video Technical Quote Presentation slides, Part III, shall be separately bound from all other Parts.

The offeror shall submit each deliverable on the due dates indicated on the Cover Letter.

Unless otherwise specified, one page is one side of an 8.5" x 11" piece of paper.

All electronic files shall be in Microsoft Word or Excel formats. Any documents provided in Section 9 – List of Attachments shall be submitted using the same file format (e.g., Project Staffing Plan shall be submitted in Excel file format using the Excel template provided). Printed pages must maintain 1" margins, 12 point Times New Roman font, and be single spaced. Headers and footers may be of a larger font, but shall not be smaller than ten point Times New Roman font. Charts/Graphics/Tables embedded in quote will count toward page limitations. Charts/Graphics/Tables must maintain a font minimum of ten point Times New Roman Font, including in the Part III slides. Ledger paper size 11" x 17" may be used in the staffing plan when providing charts/graphics/tables. A single side of an 11" x 17" paper will be counted as two pages where page limitations apply. Items such as a Title Page, Table of Contents, Cover Letter, List of Figures, and Acronym Lists are excluded from the page counts below, unless they are inclusive of a document. (e.g., a Table of Contents within the Draft Transition-In Plan); in which case it would count toward the stated page limitations. PDF files will be allowed for executed documents such as Letters of Commitment.

Any pages submitted beyond the page limitations will be removed and not evaluated.

11.7.1 QUOTE PART I

Part I contains preliminary written Price Quote information. This volume shall contain the following:

a. Organizational Conflict of Interest Statement (TAB A)
b. Contractor Registration (TAB B)
c. Pass/Fail elements (TAB C)
    - Statement stating that the offeror possess Schedule 738 X: SIN 595-22, and SIN 595-26 (TAB C.1)
    - Key Personnel Names (TAB C.2)
    - Key Personnel Letters of Commitment (TAB C.3)
    - Section 508 Compliance Statement (TAB C.4)

11.7.2 QUOTE PART II

Part II is the remainder of the written Price Quote and shall contain the following:

d. Request for Quotation (SF 18) (TAB D)
e. Section 1 - Supplies or Services and Prices/Costs (TAB E).
f. Price Supporting Documentation (TAB F)
g. Subcontractor Supporting Documentation (TAB G)
h. Pricing Assumptions (TAB H)
i. Price Explanation (TAB I)
j. Security Requirements for Unclassified Information Technology Resources Statement (TAB J)

11.7.3 QUOTE PART III

Part III is the written Technical quote and shall contain the following: (page limitations, if applicable, are indicated in the parentheses following each item)

a. Project Staffing Plan Table
b. Key Personnel Qualification Matrix(KPQM) (three pages per Key Person)
c. Corporate Experience (15 pages total)
d. System Requirements
e. Integrated Master Schedule (IMS)
f. Training Plan (10 pages total)
g. Performance Measures
h. Technical Assumptions (if any)
i. Copy of Video Technical Quote Presentation Slides

The CO will schedule the oral technical Q&A sessions after all quotes are received. The video technical quote presentation shall contain the information shown in paragraph 11.11.5.

11.7.4 QUOTE PART IV

Part IV is the Video Technical Quote Presentation and shall address the following:

a. Technical Approach
b. Management Approach
c. Key Personnel and Project Staffing

The Video Technical Quote Presentation slides, which shall be separately bound, are due with Part II and Part III of the written quote. If the slides are not submitted by the quote due date specified in the Cover Letter, they will not be evaluated.

11.8 SUBMISSION OF THE WRITTEN PRICE QUOTE (PARTS I AND II)

Written Price Quotes shall be submitted as an original, one paper copy, and an electronic copy. The offeror shall submit all proposed costs using Microsoft Excel software utilizing the formats without cells locked and include all formulas. The quote shall contain the following tabs:

a. Organizational Conflict of Interest (OCI) Statement (Tab A). The offeror and each subcontractor, and consultant shall complete and sign an OCI Statement. All information pertaining to OCI is outlined in Section 7.4.1

   If the offeror signs an NDA with E3 Federal Solutions, LLC and Business Intelligence, Inc. the offeror may include the agreement in Tab A.

b. Contract Registration (Tab B). The offeror shall submit a statement that the contract vehicle under which this quote is being submitted has been registered in ASSIST and that all information in ASSIST is up-to-date.

c. Pass/Fail Elements (Tab C). The offeror must provide:

1. Schedule 738 X: The offeror shall provide a statement stating it possesses Schedule 738 X: SIN 22 and SIN 26.
2. Key Personnel: The offeror shall provide a list of all proposed Key Personnel, including key person name, position title and start date. This list shall be consistent with the information provided in the KPQM and Project Staffing Plan.
3. Key Personnel Letters of Commitment: The offeror shall provide a Letter of Commitment for each proposed Key Person, at the proposal Part I submission due date. To meet this Pass/Fail criterion, the letter shall be signed by the proposed Key Person and shall state that (1) the proposed Key Person named is employed by the offeror or subcontractor, or has an offer of employment from the offeror or subcontractor that the Key Person intends to accept in the event of an award being made to the offeror; and (2) the proposed Key Person is available and committed to begin work on the Project Start Date or a date that aligns with the proposed staffing plan.
4. Section 508 Compliance: The offeror's written quote shall include a statement indicating its capability to comply with Section 508 requirements (Section 7.5). The offeror's quote will be evaluated to determine whether it includes a statement indicating its capability to comply with Section 508 requirements throughout its performance of this TO. Any quote that does not include a statement indicating the offeror's capability to comply with Section 508 requirements throughout its performance of this TO shall be eliminated from further consideration for award.

d. Request for Quotation (SF 18) (Tab D). When completed and signed by the offeror, constitutes the offeror's acceptance of the terms and conditions of the proposed TO. Therefore, the form must be executed by representatives of the offeror authorized to commit the offeror to contractual obligations. The offeror shall sign the SF 18 in Block #14.

e. Supplies or Services and Prices (Tab E). The offeror shall indicate the price to be charged for each item in Section 1 - Supplies or Services and Price/Costs rounded to the nearest whole dollar.

f. Price Supporting Documentation (Tab F). The information requested in the quote is required to enable the Government to perform a price analysis. The offeror shall prepare one summary schedule (Section 1 – Supplies or Services and Prices/Costs) which provides the total NTE amount for each CLIN and the total NTE price offered. Along with the summary schedule, the offeror is required to provide full back-up documentation for the Labor CLINs for each period of performance and each task area using the provided Excel workbook (Section 9 – List of Attachments, Attachment Z). The back-up documentation shall detail the labor categories to be used, labor hours proposed by category, material and equipment costs, and a total cost breakdown to include a summary total for each cost component (e.g., labor, overhead, or general and administrative) support product price information).

g. Subcontractor Supporting Documentation (Tab G). Subcontracting is permissible under this RFQ. If subcontracting is proposed, all labor and materials proposed must be

contained within the prime contractor's GSA Schedule Contract. Furthermore, the prime contractor shall disclose to the Government's CO a copy of the subcontract pricing, and terms and conditions, and shall identify any small businesses. The Government will evaluate the acceptability of any subcontracting arrangement as part of its evaluation of price. Failure to provide complete supporting documentation may result in no further consideration of the offeror's quote. Subcontractors may submit proprietary data directly to the CO or through the prime contractor in a separate, sealed envelope. **The prime contractor shall specifically state whether the estimated costs of any proposed subcontractor will be in excess of $10M over the life of the TO for Government accomplished Equal Employment Opportunity (EEO) verification purposes.**

h. Pricing Assumptions (Tab H). The offeror must submit, under a separate tab, all (if any) assumptions upon which the Cost/Price Quote is based.

i. Price Explanation (Tab I). The offeror shall describe why the total price of the TO is above or below the range in Section 11.5. The offeror shall include an explanation that specifically draws the Government's attention to any unique technical aspects of the quote the offeror would like the Government to consider as the justification for the deviation from the range.

j. Security Requirements for Unclassified Information Technology Resources Statement (Tab J). In accordance with the General Services Administration Acquisition Regulation (GSAR) provision 552.239-70, Information Technology Security Plan and Security Authorization, the offeror shall submit a statement on its approach for completing the IT Security Plan, security authorization, and other requirements in accordance with GSAR clause 552.239-71, Security Requirements for Unclassified Information Technology Resources.

The offeror shall not include any price data in the technical, management, staffing or corporate experience portions of the quotes.

11.9 SUBMISSION OF THE WRITTEN TECHNICAL QUOTE (PART III)

Each offeror shall submit all information described in the following paragraphs. The offeror shall provide an original, ten copies, and an electronic copy on a CDfree of viruses and malware containing all required sections of this Part.

11.9.1 PROJECT STAFFING PLAN TABLE

The offeror shall provide a Project Staffing Plan Table in accordance with the Project Staffing Plan Table Template contained in Section 9 - List of Attachments, Attachment W. The submission shall contain all individuals that will be working on this effort. All Key Personnel proposed shall be identified in the Project Staffing Plan Table and available to begin work consistent with the date provided in the Letter of Commitment.

If the names of all non-Key Personnel are not known prior to offer submission, the offeror may indicate "to be determined" or TBD in the Project Staffing Plan Table. The names of non-Key Personnel are the only identifiers that may remain unspecified in the Project Staffing Plan Table. The names of all non-Key Personnel that can be provided shall be provided. Staffing in the

Project Staffing Plan Table provides a basis for the Government to determine the efficacy of the Project Staffing Plan in relation to the offeror's Technical Approach. If TBD is indicated for any non-Key Personnel, the offeror shall supply the offeror's proposed experience/certifications that would be needed to perform the proposed Technical Approach in that role. All qualification sections of the Project Staffing Plan Table shall be completed uniquely for each person or TBD role provided.

The offeror shall ensure there is consistency in the level of effort between the Staffing Plan provided in Part III and the Cost Quote provided in Part II, being cognizant of rounding issues. The offeror shall include all staff in each sheet of the Project Staffing Plan Table, regardless of whether there are hours proposed in that period.

11.9.2 KEY PERSONNEL QUALIFICATION MATRIX (KPQM)

The offeror shall submit a KPQM (see Section 9 – List of Attachments, Attachment X) for each Key Person proposed relating the specialized experience identified in Section 7.1 of this TO and the qualifications of the person or persons being proposed for that position. For those additional Key Personnel proposed, the offeror shall identify the specialized experience and the corresponding qualifications for this experience. Each KPQM shall be limited to three pages.

The offeror shall represent the following:

a. All Key Personnel meet the requirements of the TO.
b. The offeror shall include a statement that the proposed Key Person named is employed and available to begin work on the date provided in the Letter of Commitment for each Key Personnel.

11.9.3 CORPORATE EXPERIENCE REFERENCES

The offeror shall provide Corporate Experience for three projects performed within the last five years by the business unit that will perform this effort. To the greatest extent possible, Corporate Experience references shall be the offeror's direct experience as the prime contractor. These three projects must be similar in size, scope, and complexity to the requirements identified in Section 2 - PWS. The Corporate Experience information must be submitted in the format provided in Section 9 - List of Attachments, Attachment Y. The offeror should ensure that all of the POCs are aware that they may be contacted.

These three projects must be collectively similar in size, scope, and complexity to the requirements identified in Section C – Performance-Based Statement of Work. The contractor shall map its Corporate Experience references to the Task Areas of the RFQ, including the roles or functions performed by the contractor in support of the Corporate Experience reference.

All three projects shall be contracts or orders for the performance of actual technical requirements. Master contract vehicles (e.g., Blanket Purchase Agreements, Indefinite Delivery/Indefinite Quantity contracts) do not satisfy the Corporate Experience requirement unless submitted together with a TO similar in size, scope, and complexity to this requirement and awarded and performed under the vehicle.

11.9.4 (RESERVED)

11.9.5 SYSTEM REQUIREMENTS

System Requirements (Section 9 – List of Attachments, Attachments L and M) and Interface Requirements (Section 9 – List of Attachments, Attachments O through T) are integral to this RFQ, in addition to the supporting tasks outlined in Section 2 - PWS of the RFQ. The contractor shall review the Requirement Attachments (identified above) and identify if its COTS solution meets those requirements 'out of the box' through configurations, could be met through the development of an extension, or through a customization. The contractor shall describe how it will meet requirements in Attachment L and M provided in Section 9 – List of Attachments of the RFQ by marking the correct column for each functional requirement.

11.9.6 DRAFT IMS

The offeror shall provide a draft IMS for an HR and T&A Implementation in accordance with 2.5.1.4.5.

11.9.7 DRAFT TRAINING PLAN

The offeror shall provide a draft Training Plan for HR and T&A Implementation in accordance with 2.5.5.1.

11.9.8 PERFORMANCE MEASURES

The offeror shall provide Performance Measures to augment Performance Measures (Section 9 – List of Attachments, Attachment N) as appropriate to its quote. In addition, the offeror shall provide performance metrics for each of its proposed Performance Measures.

11.9.9 TECHNICAL ASSUMPTIONS

The offeror shall identify and address assumptions affecting the technical quote citing the component(s) of the quote to which they pertain. All technical assumptions and Basis of Estimate assumptions shall be included in the technical volume. This shall include any non-Price information that serves as the basis of a Price assumption identified in the offeror's Price Quote. The Government reserves the right to reject any quote that includes any assumption that adversely impacts the Government's requirements.

11.10 DELIVERY INSTRUCTIONS

The offeror shall deliver written quotes and receive acceptance from:
Mark H. Santasiero (Contracting Officer) or Millicent Hawkins (Contracting Specialist)
GSC-QF0B- 16-33040
FEDSIM Project Number 2016007GS
GSA FAS AAS FEDSIM

1800 F Street, NW
Washington, D.C. 20405

Quotes not received by 11:00 a.m. Eastern Time (ET) on the date stated in cover letter will not be considered.

Note: Please bring all quotes to the E Street entrance of the GSA building at 1800 F Street, NW, Washington, D.C. 20405. Upon arrival, call Millicent Hawkins, Contract Specialist, at 703-605-3654. The Contract Specialist will meet the offeror at the GSA loading dock on E Street. It is suggested that the offeror park on E Street in front of GSA or pull over right outside of the loading dock ramp to unload the boxes. Delivery acceptance/quote receipt will be given once the offeror has transferred his/her box of quote materials to the Contract Specialist at the loading dock on E Street. Please note that all quote boxes are subject to security scanning after receipt.

11.11 SUBMISSION OF THE VIDEO TECHNICAL QUOTE PRESENTATION (PART IV)

The offeror shall provide ten electronic copies of the Video Technical Quote Presentation containing the information required herein Section 11.11.5. The Video Technical Quote Presentation will be used to assess the offeror's capability to satisfy the requirements set forth in the RFQ.

Video Technical Quote Presentation slides presented that differ from slides delivered with the Technical Quote in Part III will not be evaluated in either Part III or Part IV.

While there will be a separate oral Q&A session scheduled (See Section 11.11.3.1), it is the Government's expectation that the offeror will present its initially submitted quote in a manner that is clear and complete.

11.11.1 VIDEO TECHNICAL QUOTE PRESENTATION CONSTRAINTS

The offeror shall identify all authors of the presentation by name and association with the offeror in the opening credits. Key Personnel introductions may be integrated into the video opening credits for clarity. Participation in the presentation shall be limited to the offeror's Key Personnel and no more than three additional corporate representatives of the offeror. An offeror's "Key Personnel" includes only those persons who will be assigned to the TO as Key Personnel as described in Section 7.1. The three additional corporate representatives (e.g., CEOs, company presidents, or contract representatives) from the offeror may appear for an introductory role, but will not be allowed to deliver the content of the offeror's quote. Introductory remarks by any corporate representatives will not be evaluated, but will count towards the offeror's allotted Video Technical Quote Presentation time. For the remainder of the presentation, only Key Personnel shall present. Content presented by any non-Key Personnel will not be evaluated. Unobtrusive company logos or names can be inserted in any or all video presentation slides or content.

The offeror's video presentation shall not exceed 90 minutes. There is no limit to the number of slides that can be presented during the Video Technical Quote Presentation within the allotted timeframe. Only those video presentation slides presented as part of the Video Technical Quote Presentation will be considered for evaluation. Any content presented after the time limit is reached and any slides over and above those presented during the video presentation will not be evaluated.

11.11.2 VIDEO TECHNICAL QUOTE PRESENTATION MEDIA

Content relating to specific solicitation requirements should be logically identified (e.g., sequentially numbered in the lower right corner of the video presentation slides, or titled in alignment with solicitation requirements). The offeror shall provide the presentation in one of three formats:

a. BluRay quality: H.264, 24Mbps, file type: .MP4
b. DVD-ROM HD quality: H.264, 24 Mbps, file type: .MP4
c. DVD (regular) quality: H.222/H.262, 9 Mbps, file type .MP4

Please note, the Government does not have a preference as to which format offerors elect to use. Video Resolution is up to the offeror. Resolution quality is not rated in the technical evaluation. Submission in a single, playable disk is preferred.

GSA FEDSIM uses Azend Group Corp Model#BDP-M1061, Sony Model#BDP-SX1000, and ASUS Blu-Ray Combo Model#SBC-06D2X-U Video players to view video media. Offerors are encouraged to test video playback and compliance using the same models. As an alternative, the offeror may contact the FEDSIM CS at least one week prior to the due date of Quote Part IV, Video Technical Quote Presentation, to schedule a time in which the offeror can utilize one of FEDSIM's players to assess playability themselves. The FEDSIM CS will provide the video player to the offeror and the offeror will have no longer than 30 minutes to assess playability. The video presentation shall be in a presentation format. Generally, the visual of the Key Personnel presenting the content shall be visible and not obscure the slide. Limited use of graphics will be allowed, such as zooming in to parts of the offeror's technical solution. During this time, the visual of the Key Personnel may be replaced with the name of the speaker. Limited use of animation for technical diagrams is allowable. While this will not be evaluated, the Government discourages the use of transitions and advanced video graphics or cinematic features.

Each slide shall reference in the top right corner, the Section/subsection number from Section 2 and the Section 5 deliverable that is being described/discussed on the slide, where applicable.

11.11.3 TECHNICAL QUOTE ORAL Q&A SESSION

Each offeror determined to have passed all Pass/Fail requirements shall participate in an oral Q&A session led by the FEDSIM CO and participated in by the Technical Evaluation Board (TEB) Members and other representatives of the Government. The FEDSIM CO will schedule the Q&A session once all Part I quotes are received.

The purpose of the oral Q&A session is to allow the Government to ask questions, as deemed necessary, that will serve to clarify to the Government, for evaluation purposes, the offeror's methodologies and approaches as proposed. It is the Government's intent to ask clarifying questions only to the extent deemed minimally necessary for the evaluators to sufficiently understand what is being proposed.

Attendance at the oral Q&A session is limited to the offeror's proposed Key Personnel and no more than three additional corporate representatives of the offeror. The offeror's Key Personnel shall be prepared to answer questions about Parts III and IV in the oral Q&A session. The oral Q&A session will be held at the unclassified level.

11.11.3.1 TECHNICAL QUOTE ORAL Q&A SESSION SCHEDULING

The FEDSIM CO will schedule the oral Q&A session with the authorized negotiator or the signatory of the SF 18. Time slots will be assigned randomly and may not be changed or traded. The Government reserves the right to reschedule any offeror's oral Q&A session at its sole discretion.

The oral Q&A session will be held at facilities designated by the FEDSIM CO. The exact location and any other relevant information will be provided when scheduled.

11.11.3.2 TECHNICAL QUOTE ORAL Q&A SESSION FORMAT

The offeror shall address any clarification questions posed by the FEDSIM CO or the TEB Chairperson. Although no stated time limit for the duration of the oral Q&A session will be imposed, for planning purposes, it is anticipated that the sessions should not last more than two hours.

The offeror shall bring bound printed copies of its Parts III and IV technical quote volumes to refer to throughout its designated session. The offeror will not be presenting any information to the Government other than answering the clarification questions posed.

During the initial oral Q&A session, the offeror will address any clarification questions posed by the TEB Chairperson. The offeror may briefly caucus to coordinate responses to specific requests for clarifications. These brief caucuses may not last longer than five minutes before presenting the coordinated response. The entire session will be documented by the Government.
Upon completion of the oral Q&A session, the Government may caucus to formulate any additional clarification questions regarding the technical quote; however, quote revisions are not expected and will NOT be allowed.

11.11.4 RECORDING OF THE TECHNICAL QUOTE ORAL Q&A SESSION

The offeror may not record or transmit any of the oral Q&A session. All offeror's electronic devices shall be removed from the room during the oral Q&A session. The offeror is permitted to have an electronic timer in the room during the oral Q&A session.

11.11.5 VIDEO TECHNICAL QUOTE PRESENTATION TOPICS

Within the Video Technical Quote Presentation, the Government does not expect the offeror to provide a restatement of the information already submitted in writing in Part III. Instead, the offeror shall address this information under the topics provided. The Video Technical Quote Presentation shall include the following topics, and be organized in the following order:

a. Topic 1: Technical Approach
b. Topic 2: Management Approach
c. Topic 3: Key Personnel and Project Staffing

11.11.5.1 TECHNICAL APPROACH (TOPIC 1)

During the video presentation, the offeror shall discuss its Technical Approach in fulfilling the technical requirements identified in the RFQ as identified below. The offeror's quote shall be clear and relevant to the requirements. The offeror shall tailor its Technical Approach to achieve the requirements as identified in Section 2, Section 5, and Section 7 of the RFQ. The offeror shall describe its approach to:

a. Supporting functional requirements identified in paragraphs 2.2.1 and 2.2.2 in the Scope Section of the RFQ.
b. Establishing and managing a pre-migration hosting environment.
c. Pre-migration preparation of systems.
d. Preparing and delivering training.
e. Migrating, supporting, and stabilizing systems.
f. Providing managed services solutions.
g. Transitioning-on a new customer within its proposed timeline, and
h. Conducting the Business Process Realignment assessment to include the steps taken after the assessment.

11.11.5.2 MANAGEMENT APPROACH (TOPIC 2)

During the video presentation, the offeror shall discuss a relevant Management Approach in fulfilling the technical requirements identified in the RFQ. The offeror shall tailor its Management Approach to achieve the requirements as identified in Section 2, Section 5, and Section 7 of the RFQ. The offeror shall describe:

a. Its approach to Project Management support.
b. Its approach to security management.
c. Its approach and suggested augmentation to performance measures (Section 9 – List of Attachments, Attachment N).
d. Current risks based on the RFQ's requirements and anticipated actions to mitigate or eliminate risks.
e. Its communication plan for customer relationship management and problem escalation (e.g., Government stakeholders, and corporate headquarters).
f. Its approach to incorporating small business subcontracting throughout the life of the contract.

11.11.5.3 KEY PERSONNEL AND PROJECT STAFFING (TOPIC 3)

During the video presentation, the offeror shall discuss its Key Personnel and Project Staffing approach in fulfilling the technical requirements identified in the RFQ. The offeror's proposed approach should be relevant to the RFQ. The offeror shall describe:

a. It's rationale for proposed labor categories for each RFQ task.
b. The value that the proposed project team provides (skills, experience, and qualification to completing the RFQ's requirements).
c. It's rationale for choosing its proposed Key Personnel.
d. How each Key Person would be involved in each task/subtask and how their qualifications and experience uniquely qualify them for the Key Personnel positions described in Section 7.1 – Key Personnel.

12.1 METHOD OF AWARD

The Government anticipates awarding a TO to the offeror whose quote is the most advantageous to the Government, price and other factors considered. Technical quotes will be evaluated based on the factors described in Section 12.8. All evaluation factors other than price, when combined, are significantly more important than price. Award will be made to the offeror whose quote is determined be the best value for the Government.

Quotes shall set forth full, accurate, and complete information as required by this solicitation package (including Attachments). The penalty for making false statements in quotes is prescribed in 18 U.S.C. 1001.

12.2 PASS/FAIL ELEMENTS

The Government will evaluate the following pass/fail elements. **A failure on any single Pass/Fail criteria will make the quote ineligible for award,** with no further evaluation of the technical and cost quote accomplished by the Government.

Pass/Fail Elements:
The following will be evaluated on a Pass/Fail basis:

a. The Government will reject any quote in which the offeror does not possess the required **Schedule 738 X:** SIN 22 (Private SSC for Core HR Services) and SIN 26 (Private SSC for non-Core HR Services) (Section 11.8).
b. The Government will reject any quote that does not provide a name for each Key Person proposed at the quote submission due date. A quote that states, “To Be Determined” or TBD for a proposed Key Person, or omits a Key Person, will be rejected by the Government (Section 11.8).
c. The Government will reject any quote that does not provide a Letter of Commitment, signed by each proposed Key Person at the quote submission due date (Section 11.8).
d. The Government will reject any quote that does not provide a Section 508 Compliance Statement (Section 7.5, Section 11.8).

12.3 EXPLANANTION FOR BASIS OF AWARD

This award will be made under FAR 8.4; formal debriefings will not be conducted. In accordance with 8.405-2(d), a brief explanation of the basis for the award decision will be provided upon request.

12.4 PRICE QUOTE EVALUATION

The offeror’s written price quote including the six-month extension period authorized by FAR clause 52.217-8 (Section 11.8, Parts I and II, Tabs A through J) will be evaluated to determine price reasonableness. An analysis of price reasonableness will be made only if the offeror receives an overall technical rating of ACCEPTABLE or higher.

The offeror's written price quote will be evaluated by the Government. Prices that are excessively high or low (without sufficient justification) may be considered unrealistic and unreasonable and may receive no further consideration. Any quote that is not within the total cited in Section 1 - Supplies or Services and Price/Costs and in Section 11 - Instructions, Conditions and Notices to Offerors, shall include an explanation that specifically draws the Government's attention to any unique technical aspects of the quote the offeror would like the Government to consider as the justification for the deviation from the range.

The Government will evaluate each price quote for the reasonableness of its pricing. The fair and reasonable price determination will look at the labor mix and hours proposed. Price reasonableness will be determined by looking at whether the total price is reasonable, since labor and material rates set forth in GSA Schedule contracts are deemed fair and reasonable under FAR 8.404(d). Price reasonableness will also include a determination by the FEDSIM CO that proper discounts have been offered commensurate with maximum order thresholds for prime contractors and in accordance with subcontractor arrangements. Also, the Government will consider team discounts that are required to remain in effect for the period of performance of the TO.

12.5 ORGANIZATIONAL CONFLICT OF INTEREST

Tab A will be evaluated to assess whether or not an actual or potential OCI exists. If an actual or potential conflict of interest is identified that cannot be mitigated, avoided, or waived in accordance with FAR Part 9.5, that offeror will be ineligible for award.

Note: OCI determinations can only be assessed at time of quote when complete information is present.

12.6 PRICE ASSUMPTIONS

The Government reserves the right to reject any quote that includes any price assumptions that may adversely impact satisfying the Government's requirements.

12.7 OVERTIME AND EXTENDED BILLING HOUR PRACTICES

The Government reserves the right to reject any quote that includes overtime or extended hours billing practices that adversely impact or affect the Government's requirements.

12.8 TECHNICAL EVALUATION FACTORS

The Government will evaluate technical quotes (Section 11 - Instructions, Conditions, and Notices to Offerors or Respondents, Part III and Part IV) based on the following factors:

Factor 1: Technical Approach to include the written responses to Systems Requirements (Section 11.9.5), to the written IMP (Section 11.9.6), and to the written Training Plan (Section 11.9.7), as well as information presented under the technical approach factor (Section 11.11.5.1) as part of the video technical presentation.

Factor 2: Management Approach to include the written responses to Performance Measures (Section 11.9.8) as well as information presented under the management approach factor (Section 11.11.5.2) as part of the video technical presentation.

Factor 3: Key Personnel and Project Staffing as shown on the written Project Staffing Plan Table (Section 11.9.1) the written Key Personnel qualifications (Sections 7.1 and 11.9.2) as well as information presented under the Key Personnel and Project Staffing factor (Section 11.11.5.3) as part of the video technical presentation.

Factor 4: Corporate Experience (Section 11.9.3).

The technical quote evaluation factors are listed in descending order of importance. All four technical factors when combined are significantly more important than price. The Government will combine the results of the written and video submissions to arrive at a rating for the technical evaluation factors as a whole. The receipt of an evaluation rating of Not Acceptable in any single Factor will result in the overall quote being determined Not Acceptable and therefore ineligible for award.

12.8.1 FACTOR 1: TECHNICAL APPROACH

The offeror's Technical Approach will be evaluated based on its adherence to the instructions identified in Section 11.11.5.1. In addition, the offeror's Technical Approach will be evaluated on its clarity, relevance, comprehensiveness, level of detail, and degree to which it is effective.

The offeror's ability to meet systems requirements (11.9.5) will be evaluated on its responses to requirements outlined in Section 2.2.2 and the requirements in Section 9 – List of Attachments, Attachments L, M, O, P, Q, R, S, and T. The offeror's response will be evaluated on its clarity, relevance, comprehensiveness, level of detail, and effectiveness.

The offeror's IMS will be evaluated based on its adherence to the instructions identified in Section 11.9.6, and on its clarity, relevance, comprehensiveness, level of detail, and effectiveness.

The offeror's Training Plan will be evaluated based on its adherence to the instructions identified in Section 11.9.7, and on its clarity, relevance, comprehensiveness, level of detail, and effectiveness.

12.8.2 FACTOR 2: MANAGEMENT APPROACH

The offeror's Management Approach will be evaluated based on its adherence to the instructions identified in Section 11.11.5.2. In addition, the offeror's Management Approach will be evaluated on its clarity, relevance, comprehensiveness, level of detail, and effectiveness.

The Government provided Performance Measures (Attachment N). In accordance with Section 11.11.5.2, the Government will evaluate the offeror's approach and suggested augmentation to

performance measures based on clarity and relevance to RFQ requirements. The Performance Measures will also be evaluated on comprehensiveness, level of detail, and effectiveness.

12.8.3 FACTOR 3: KEY PERSONNEL AND PROJECT STAFFING

The offeror's Key Personnel and Project Staffing approach will be evaluated based on its adherence to the instructions identified in Section 11.11.5.3, and on its clarity, relevance, comprehensiveness, level of detail, and degree to which it is effective.

The offeror's Project Staffing Plan will be evaluated on its clarity, relevance, and adherence to the Project Staffing Plan template identified in Section 9 – List of Attachments, Attachment W and its adherence to the instructions and requirements identified in Section 11.9.1.

The offeror's KPQM will be evaluated on its adherence to the KPQM template identified in Section 9 – List of Attachments, Attachment X. In addition, the KPQM will be assessed with respect to Section 7.1 criteria as well as how clear, relevant, comprehensive, and detailed it is and on its adherence to the instructions/and requirements identified in Section 11.9.2.

12.8.4 FACTOR 4: CORPORATE EXPERIENCE

The Government will evaluate Corporate Experience from any proposed team member. The offeror's Corporate Experience will be evaluated based on its adherence to the instructions identified in Section 11.9.3 as well as its clarity. Corporate Experience will be evaluated on its similarity in size, scope, and complexity to the RFQ's requirements as well as the degree to which it is comprehensive and effective.

12.9 TECHNICAL ASSUMPTIONS

Offeror assumptions will be reviewed in the context of the technical factor to which they apply. The Government reserves the right to reject any quote that includes any assumption that may adversely impact satisfying the Government's requirements.

HRT2T Program

Interface Control Document between
HR Shared Service Center
and the GSA Credential and Identity Management System

Dated - March 2016

Interface Control Document between
HR Shared Service and GCIMS

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Interface Control Document between
HR Shared Service and GCIMS

1 Introduction

The Human Resources (HR) Shared Service Center (SSC) will be the new system that GSA's Office of Human Resources (OHRM) uses to manage HR functions. This is an approved OPM SSC that will require interfaces with GSA systems. The HR SSC will include many primary core functions, but as it relates to this interface, the HR SSC will include the authoritative list of employees and their characteristics, and the time recording data for each employee for each pay period. There are multiple existing interfaces between GSA's current system Comprehensive Human Resources Integrated System (CHRIS) and GSA systems. These interfaces must be retained in the new system to avoid rework of the GSA systems.

The GSA Credential and Identity Management System (GCIMS) is a web based application that manages credential and background investigation information of all GSA employees and contractors. The HR SSC and GCIMS will have an integration point to pass employee information to keep the two systems synchronized in terms of employees needing background investigations and the status of investigations completed or in progress.

Note - The actual file formats and fields are subject to change prior to implementation of the interface but are provided here for evaluation by the vendor of the complexity of the interfaces.

2 Scope

The data flows between the HR SSC and LMS will be primarily file based flows using SFTP. Please consult the details of each flow for confirmation of the protocols, data types, etc. The following table summarizes the data flows.

Interface Name	Description	Source System	Target System	Existing File?
Employee Data	Provide a full listing of employees	HR SSC	GCIMS	Y
Organization Data	Provide a listing of organizations to be managed	HR SSC	GCIMS	Y
Separation Data	Provide data about separated employees	HR SSC	GCIMS	Y
Federal Credential Data	Provide data for employees including their Smart Credential Number	GCIMS	HR SSC	Y

3 Detailed Specification

Each flow described in the Scope section has its own specification.

3.1 Employee Data – HR SSC to GCIMS

3.1.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR044
Purpose of Interface	The GCIMS system needs information about all employees in the HR system and their status of background investigation.
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	GCIMS
Receiving System Owner	GSA
Type of File	ASCII – fixed field length
Number of data elements	81
Description of data elements in interface	Employee data with information such as country of citizenship and information in order to begin background investigation requests.
Current Protocol Used	SFTP
Production Frequency	Daily M-F @ 18:00
Sequencing of interface	N/A
Approximate size of file	~ 3700 bytes * 12,000 employees
Other Notes and Comments	

3.1.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
CHRIS System Generated Unique number	Number	30	
CHRIS Employee Number	Number	15	
Last Name and Suffix	Character	150	
First Name	Character	150	
Middle Name	Character	60	
City of Birth	Character	90	
State of Birth	Character	90	
Country of Birth	Character	2	
Country of Citizenship	Character	30	
U.S. Citizen	Character	1	
Preferred First Name	Character	80	
Agency Code	Character	4	
Home Address 1	Character	240	
Home Address 2	Character	240	
Home City	Character	30	
Home State	Character	2	
Home Zip Code	Character	30	
Home Country	Character	4	
SSN	Character	11	
Date of Birth	Date	11	DD-MON-YYYY
Employee Status	Character	8	
Assignment Status	Character	80	
Duty Status	Character	2	
Gender	Character	1	
SCD Leave	Date	11	DD-MON-YYYY
Prior Investigation	Character	30	
Type Of Investigation	Character	30	
Date of Investigation	Date	11	DD-MON-YYYY
Type of Invest to Request	Character	30	
Adjudicator	Character	240	
Position Control Number (PCN)	Character	15	

Interface Control Document between
HR Shared Service and GCIMS

Data Item	Data Type	Length	Format
Position Control Number (PCN) Indicator	Character	1	
Job Title	Character	80	
Supervisory Status	Character	80	
Pay Plan	Character	2	
Job Series	Character	4	
Level/Grade	Character	2	
Work Schedule	Character	1	
Key Emergency Essential Designation	Character	1	
LEO Position Indicator	Character	1	
Position Telework Eligibility	Character	1	
Position Sensitivity	Character	1	
Position Start Date	Date	11	DD-MON-YYYY
Region	Character	1	
Duty Location Code	Character	9	
Duty Location City	Character	40	
Duty Location State	Character	40	
Duty Location County	Character	40	
Agency Code/Subelement	Character	4	
Organization Code	Character	240	
Office Symbol	Character	18	
Detail Begin Date	Date	11	DD-MON-YYYY
Detail End Date	Date	11	DD-MON-YYYY
Detail Position Control Number (PCN)	Character	15	
Detail Position Control Number (PCN) Indicator	Character	1	
Detail Position Number	Character	15	
Detail Position Title	Character	60	
Detail Organization Code	Character	240	
Detail Office Symbol	Character	18	
Detail Pay Plan	Character	2	
Detail Job Series	Character	4	
Detail Level/Grade	Character	2	
Detail Work Schedule	Character	1	
Detail Region	Character	1	
Detail Duty Location Code	Character	9	
Detail Duty Location City	Character	40	

Data Item	Data Type	Length	Format
Detail Duty Location State	Character	40	
Detail Duty Location County	Character	40	
Supervisors CHRIS Employee Number	Character	30	
Supervisors GCIMS CHRIS ID	Number	15	
Supervisors Last Name and Suffix	Character	150	
Supervisors First Name	Character	150	
Supervisors Middle Name	Character	60	
Supervisors Position Control Number (PCN)	Character	15	
Supervisors Position Control Number (PCN) Indicator	Character	1	
Supervisor Email Address	Character	150	
Address Line 3	Character	240	
Type of Employment	Character	1	
Handicap (Disability)	Character	1	
Position Title	Character	60	
Position Organization	Character	18	

3.2 Organization Data – HR SSC to GCIMS

3.2.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR044
Purpose of Interface	The GCIMS system needs information about the organizational structure from the HR system.
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	GCIMS
Receiving System Owner	GSA

Summary Description	
Attribute	**Description**
Type of File	ASCII – fixed field length
Number of data elements	21
Description of data elements in interface	List of organizations and addresses for contact purposes
Current Protocol Used	SFTP
Production Frequency	Daily M-F @ 18:00
Sequencing of interface	N/A
Approximate size of file	~ 1024 bytes * number of organizations in the HR system
Other Notes and Comments	

3.2.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
Abolished by Order	Character	60	
Agency Code/Subelement	Character	4	
Changed by Order	Character	60	
Created by Order	Character	60	
Date Abolished	Date	11	
Date of Last Change	Date	11	
From Date	Date	11	
Location	Character	9	
Location Address	Character	240	
Name	Character	240	
Office Symbol	Character	18	
OPM Organizational Component	Character	18	
Org Info Line 1	Character	38	
Org Info Line 2	Character	38	
Org Info Line 3	Character	38	
Org Info Line 4	Character	38	

Data Item	Data Type	Length	Format
Org Info Line 5	Character	38	
Org Info Line 6	Character	38	
Personnel Office Identifier	Character	4	
To Date	Date	11	
OCT Org Title	Character	38	

3.3 Separation Data – HR SSC to GCIMS

3.3.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR044
Purpose of Interface	The GCIMS system needs information about employees who have separated in the last day.
Source System/Module and/or entity	HR SSC
Source System Owner	TBA
Receiving System	GCIMS
Receiving System Owner	GSA
Type of File	ASCII – fixed field length
Number of data elements	9
Description of data elements in interface	List of separated employees and their separation dates
Current Protocol Used	SFTP
Production Frequency	Daily M-F @ 18:00
Sequencing of interface	N/A
Approximate size of file	~ 564 bytes * number of employees separated since the day before

Summary Description	
Attribute	**Description**
Other Notes and Comments	

3.3.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
CHRIS System Generated Unique number	Number	15	
CHRIS Employee Number	Number	15	
Last Name and Suffix	Character	150	
First Name	Character	150	
Middle Name	Character	60	
Preferred First Name	Character	150	
SSN	Character	11	
Reason for Separation	Character	2	
Separation Date	Character	11	

3.4 Federal Credential Data – GCIMS to HR SSC

3.4.1 Interface Overview

Summary Description	
Attribute	**Description**
RTM Number	GNFR044
Purpose of Interface	The HR system needs information about the status of background investigations. The interface contains employees whose investigations are completed.
Source System/Module and/or entity	GCIMS
Source System Owner	GSA
Receiving System	HR SSC

Summary Description	
Attribute	**Description**
Receiving System Owner	TBA
Type of File	ASCII – fixed field length
Number of data elements	37
Description of data elements in interface	List of separated employees and their separation dates
Current Protocol Used	SFTP
Production Frequency	Daily M-F @ 21:00
Sequencing of interface	N/A
Approximate size of file	~ 3435 bytes * number of employees whose background investigations completed that day
Other Notes and Comments	

3.4.2 Interface Detailed Specifications (if applicable)

The following table provides the details of the fields and formats in the current file.

Data Item	Data Type	Length	Format
CHRIS ID	Number	15	
CHRIS Employee Number	Number	15	
Last Name and Suffix	Character	150	
First Name	Character	150	
Middle Name	Character	60	
City of Birth	Character	90	
State of Birth	Character	90	
Country of Birth	Character	2	
Country of Citizenship	Character	30	
Preferred First Name	Character	80	
Work Building Name	Character	150	
Work Building #	Character	150	

Data Item	Data Type	Length	Format
Work Room/Cubicle	Character	20	
Work Address Line 1	Character	240	
Work Address City	Character	30	
Work Address State	Character	2	
Work Address Zip Code	Character	30	
Work Phone Number	Character	60	
Work FAX Number	Character	60	
Work Cell Number	Character	60	
Work Phone Number TTY	Character	60	
Work Email Address	Character	240	
Work Blackberry PIN	Character	60	
Personal Home Phone	Character	60	
Personal Cell Phone	Character	60	
Personal Email Address	Character	240	
Emergency Point of Contact (POC) Last Name	Character	240	
Emergency Point of Contact (POC) First Name	Character	240	
Emergency POC Home Phone Number	Character	60	
Emergency POC Work Phone Number	Character	60	
Emergency POC Cell Number	Character	60	
Out of Area Emergency Point of Contact Last Name	Character	1	
Out of Area Emergency Point of Contact First Name	Character	240	
Out of Area POC Home Phone Number	Character	60	
Out of Area POC Work Phone Number	Character	60	
Out of Area POC Cell Number	Character	60	
Federal Agency Smart Credential Number	Character	150	

4 Appendix A: Glossary of Terms

The following table defines the attributes used in the interface descriptions in this document.

Summary Description	
Attribute	**Description**
RTM Number	This is the number assigned and will be contained in the RTM
Purpose of Interface	A business description of the reason for the interface/extract/file transfer
Source System/Module and/or entity	This should map to one of the systems and modules listed in the diagram in Section 1.For example:CHRIS Personnel Action Processing
Source System Owner	This could be GSA, an external entity or an external customer agency
Receiving System	The system that is receiving the interface. If this is just a file being sent without direct interaction with a system (such as an extract), please note that fact
Receiving System Owner	This could be GSA, an external entity or an external customer agency
Type of File	Indicate the format of the file, e.g., comma-separated values (CVS), Extensible Markup Language (XML), text (TXT), etc.
Number of data elements	A count of how many fields are presented in the file/interface
Description of data elements in interface	List and/or description of the data elements (in layman's terms) in the file
Transfer Protocol	Description of the communication(s) protocol(s) used
Production Frequency	Describe whether this interface is daily, weekly, monthly, etc...or a combination of those

Summary Description	
Attribute	**Description**
Security Considerations	Describe any special security requirements that are applicable to this interface/file
Sequencing of interface	Describe when this interface occurs and whether there are any dependencies on other jobs and/or interfaces before this one can be produced and sent
Timing constraints	The specific time of day with time zone that the interface must be created and sent. Note if a deadline is a hard deadline or if it is flexible and/or negotiable
Approximate size of file	Description of the sizing of the files
File Name Format	How the file should be named, if available.
Other Notes and Comments	

DEFINITIONS
FIELD
Requirement Number
Requirement Type
Non-Functional Type
Description
Mandatory / Optional
Who

TECHICAL EVALUATION DEFINITIONS
In The Box
Extension
Customization

DESCRIPTION
This is an internal requirements number being used as the "requirements Name" in the GSA requirements repository.
Functional or Non-functional or OPM. OPM requirements are the HRLOB Target requirements set from the OPM web site.
If Non-functional, this states what type of non-functional requirements such as Performance, Security, etc.
This is the text of the requirement. During fit-gap, these requirements will be elaborated on and more details can be provided.
Mandatory requirements must be provided for GSA to accept the system. Optional requirements are those requirements that are useful for GSA or our partner agencies, but can be provided ~~either at later phases or as negotiated~~ through the offeror's proposed solution or as an enhancement. These have no relation to "optional CLINs / tasks" in the PWS.
Designates whether the requirement is performed by the Shared Service Center or a combination of the Shared Service Center and the Agency (GSA, OPM, etc)

Capability is avilable for proposed product out-of-the-box with configuation
Capability is avilable with extension(s)
Capability is avilable through code customization

Requirement Number	Requirement Type	Non-Functional Type
LR002	OPM	
LR003	OPM	
LR003.01	Functional	
LR004	OPM	
LR007	OPM	
LR007.01	Functional	
LR008	OPM	
LR008.01	Functional	
LR012	OPM	

Description
Ensure that collective bargaining agreements are recorded in appropriate databases.
Support the implementation of an agreement made between management and the exclusive representative of a labor unit.
Support the implementation of an agreement made between management and the exclusive representative of a labor unit IAW 5 USC 7114(b)(5).
Verify deduction of dues from the pay of the union members is appropriate in accordance with 5 USC 7115(c).
Capture data related to labor relations contract administration.
Capture data related to labor relations contract administration IAW 5 USC.
Provide labor relations support that enables the agency to accomplish its mission.
Provide labor relations support that enables the agency to accomplish its mission IAW HCAAF Section IV: Labor Management Relations.
Capture data related to labor-management relations programs.

Mandatory / Optional	Who	In The Box	Extension	Customization
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
Optional	Shared Service Center/Agency			
	TOTAL			

PART #	PARAGRAPH #	PARAGRAPH TITLE
RFQ1117146	1.2.2	First Option Period: 12-Month Option Period to start when CLIN 1 is completed.
1.2		SERVICES AND PRICES
1.2		SERVICES AND PRICES
1.2		SERVICES AND PRICES
1.2	1.2.3	SECOND OPTION PERIOD: 6-Month Option
1.2	1.2.3	SECOND OPTION PERIOD: 6-Month Option
RFQ1117146	2.2	Scope
RFQ1117146 and Attachment L -System Requirements	Section 2.2	Scope
2.5	2.5.2	TASK 2 – CONDUCT FIT GAP ANALYSIS, EXECUTE A PROOF OF CONCEPT, AND BEGIN BPR PLANNING
2.5	2.5.2.1 2.5.3.2	SUBTASK 1 – ESTABLISH A FIT/GAP AND PROOF OF CONCEPT ENVIRONMENT SUBTASK 2 – INSTALL AND CONFIGURE APPLICATION/SYSTEM

2.5	2.5.2.2 2.5.3-2.5.4	TASK & SUBTASK Alignments & Numbering
RFQ1117146	Section 2.5.3	Task 3 - ESTABLISH AND MANAGE A PRE-MIGRATION HOSTING ENVIRONMENT
2.5	2.5.3.6	Support Penetration Testing
RFQ1117146	Section 2.5.4, 2.5.5, 2.5.6	2.5.4 TASK 3 – PRE-MIGRATION PREPARATION OF SYSTEMS
RFQ1117146	2.5.6.4	Subtask 4 – Provide Post-Migration Customer Support
2.5	2.5.7.7	Subtask 7 – Provide Help Desk Services
2.5	2.5.7.7	Subtask 7 – Provide Help Desk Services
2.5	2.5.8	Task 8: Provide Security Management
5.1		PERIOD OF PERFORMANCE
5.3		Task Order Schedule and Milestone Dates (Data Cleanup Plan)
7.1	7.1.2 7.1.3	MIGRATION MANAGER FUNCTIONAL LEAD
7.1	7.1.5 & 7.1.7	Managed Services Lead/PM and Enhancement Lead

7.8 and 7.9	N/A	ODCs & Commercial Supplier Agreements
RFQ1117146	7.9.2	Commercial Supplier Agreements
11.7	N/A	Submission of Offerors
RFQ1117146	Section 11.11.5.1	Management Approach (Topic 1)
12.8	12.8.3	Factor 3: Key Personnel and Project Staffing
RFQ1117146	Attachment Z	Pricing Workbook
RFQ1117146	Attachment Z	Pricing Workbook
RFQ1117146	Attachment K	CABS, AGENCIES, INDEPENDENT GOV'T CORPS THAT MAY SELECT ANY SERVICE PROVIDER
General Question – Uptime per month metric		Uptime per Month
General Question – GAMS system		
System Requirements	COMP001.01	

System Requirements	COMP003.03	
System Requirements	COMP141	
System Requirements	COMP155.09	
System Requirements	COMP155.10	
System Requirements	COMP351	
System Requirements	COMP352	
System Requirements	GCOMP259	
System Requirements	GCOMP193	
System Requirements	GCOMP172	
SYSTEM REQUIREMENTS	GNFR044	
SYSTEM REQUIREMENTS	BEN033	
SYSTEM REQUIREMENTS	HRD111.01	
SYSTEM REQUIREMENTS	HRS028.02	
SYSTEM REQUIREMENTS	HRS028.04	
SYSTEM REQUIREMENTS	ORGP052.05	

SYSTEM REQUIREMENTS	GPM023	
SYSTEM REQUIREMENTS	GPM030	
SYSTEM REQUIREMENTS	GPPA140	
SYSTEM REQUIREMENTS	PPA009.03	
SYSTEM REQUIREMENTS	PPA011.07	
SYSTEM REQUIREMENTS	PPA080	
SYSTEM REQUIREMENTS	PPA146.02	
SYSTEM REQUIREMENTS	PPA167.01	
SYSTEM REQUIREMENTS	BEN074.02	
SYSTEM REQUIREMENTS	GHRS009	
SYSTEM REQUIREMENTS	GORGP065	
SYSTEM REQUIREMENTS	GORGP066	
System Requirements	GPPA006	

System Requirements	GPPA085	
System Requirements	GPPA149	
RFQ1117146 Attachment L -System Requirements	Non-Functional	Requirement GNFR035

QUESTION
Can the Government please confirm CLIN 1002 is a Mandatory T&M CLIN?
Attachment K distinguishes CABs that “must be supported by GSA” and others that “may select any service provider”. For initial pricing purposes for the x0003 GSA Managed Services CLINs, is it correct to assume that the offeror will only support those users included in the “CABS that must be supported by GSA.”?
CLIN 2003 is listed as optional in section 1.2.3 and in section 1.2.4, CLIN x003 is mandatory. Please clarify if these mandatory and optional designators for these CLINs are correct.
Should all references to Task 9 be replaced with Task 8, and Task 10 replaced with Task 9?
For CLIN 2008 is the contractor to provide a table similar to that for CLIN 2002 for specific labor categories, hours, and hourly rate?
Are the optional requirements in Attachment L to be staffed and priced under the enhancement CLIN or under implementation?
What is the number of GSA employees and its current customers who will need administrative training? What number require end user training? Would GSA break this out by each of the five entities?
The Attachment L -System Requirements is not consistent with the RFQ - Section 2.2 Scope. Performance Management is not listed as part of the functional requirements scope in the RFQ, while Attachment L includes mandatory Performance Management requirements. Performance Management is not part of the SSC Core HR functionality. Can the government clarify if the Performance Management Non-Core functionality is in scope for this engagement?
Please confirm that 11.11.5.1.h is referring to Section 2.5.2 in the PWS.
It is unclear where the offeror should price the application software licenses and hosting in the base period and 1st Option year period. For the purposes of application software licenses and hosting can the government add 2 FFP CLINs in both the base period and 1st Option period?

The task and subtask numbering seems to be out of sync. 2.5.3 & 2.5.4 are both labeled as Task 3. Please correct the duplication and the following numbers task numbers as well. The Tasks and sub paragraphs are misaligned which would affect correct response. Could the government provide correction of the numbering for clarity?
Will the contractor have access and use of any GSA-provided enterprise-wide licenses to support the solution? For example, will the contractor have access to Oracle database software or security software such as Nessus? If so, would the Government provide a list of the software provided?
The RFP specifies that the contractor shall allow the Government to perform penetration testing of the systems. Is the Government (or their third party contractor) also conducting Security Assessment/Risk Assessment?
Section 2.5.3 is Task 3 – Establish and Manage a Pre-Migration Hosting Environment. Section 2.5.4 is Task 3 – Pre-migration Preparation of Systems. Should task numbering be consistent with the list of tasks in Section 2.5 Tasks? Please clarify.
How many Government sites are expected to receive onsite support?
Can the government clarify if the scope of this task includes only Tier 3 support? The system requirements (Benefits Management, HR Strategy) reference a comprehensive help desk to include Tier 1, Tier 2 and Tier 3 support. However, Attachment O only references Tier 3 support metrics.
Tier 3 Help Desk Phone Response Times described as being the proper response time to the “GSA Help Desk personnel”, whereas Tier 3 Help Desk Response Time is described as being response to “customer inquiries”. Can the Government clarify whether it is intended that customers would be able to contact Tier 3 directly via e-mail?
Please confirm that 11.11.5.2.b is referring to Section 2.5.8 in the PWS.
The government has not specified an assumed start date for this effort. Is October 1, 2016 an appropriate assumption?
There is no reference to the Data Cleanup plan in the RFQ in the cited section (2.5.3.5) or in 2.5.4.2, can you please provide explanation and reference to where it would reside?
Is it correct to assume that the Migration Manager and the Functional Lead are both applicable for only the first 18 months of the Task Order? Would the government consider relaxing the requirement for key personnel for the duration of the contract and require them only through implementation?
Would the government relax the requirement of key personnel to begin work on project start date and consider revise the requirement to begin work at post implementation or option period 3?

In Sections 7.8 and 7.9, the Government contemplates purchase of software components. For example, Section 7.8 provides that the Government may provide contractor with a FAR 51 authorization to allow the contractor to procure off GSA schedules. Further, 7.9 states that licenses must be presented to FEDSIM for approval and contain certain required provisions as outlined. Will the Government clarify when the usage of these clauses apply? Will the Government issue FAR 51 authorization to purchase software required in the initial system set up?
Since the RFQ's purpose is to acquire commercial services as a managed service, would GSA consider removing this requirement from this solicitation? The reason to remove this is because these agreements are established with multiple agencies.
RFP requires Times New Roman. Would the government allow the use of 12 pt. Arial Narrow and 10pt Arial Narrow for graphics and tables in the proposal, as it is cleaner and easier to read?
In Section 11.11.5.1, GSA calls out specific topics to be addressed in the technical write up. Can GSA please clarify the required tasking related to "g. Transitioning-on a new customer within its proposed timeline?" Is the 'customer' referenced one of the five entities referenced, or a net new customer not currently served by GSA?
The text states "In addition, the KPQM will be assessed with respect to Section H.2 criteria as well as…" Can the Government identify/reference the requirements in Section H.2?
The provided pricing templates indicate a cost-plus contract type which is inconsistent with the contract type specified in the RFQ. Would GSA consider modifying the pricing templates to be Time and Materials (T&M) and Firm Fixed Price (FFP) pricing models?
In the 18-month T&M CLIN, the providers are unable to purchase the required hardware, software, and hosting for deployment. Would GSA consider moving the first Firm Fixed Price (FFP) Managed Service CLIN (CLIN 2003) to start within the first three months in order to allow for the purchase of the required software, hardware and hosting services?
U.S. Institute of Peace (Executive) and John F. Kennedy Center for the Performing Arts (Legislative) are listed twice in this table. Please confirm the sub-total and total GSA and customer agencies and CABS.
For the purpose of clarification, can the Government please explain what the difference is between uptime and utilization metrics?
GAMS is absent from the RFP - Is the GAMS service available to provide directory services for GSA users?
Please clarify the types of codes referenced in this requirement - are they specific to labor codes or pay codes (time reporting codes)? What is the maximum number of characters and values?

Please clarify if this is defined as start/end clock t times and translating to HH.M or direct entry time in HH.m or both?
Please clarify what job scheduling is and where the training schedule information is coming from?
Please clarify if the T&A system is expected to integrate with the financial management system or if this information flows through payroll to the FMS system.
Please clarify where the timecard data is to be combined from the integrated T&A system.
Please clarify what systems the T&A solution is expected to interface with.
Please clarify types of transactions and what the internal and external systems that send this information.
Please clarify the difference between a labor card and a timecard.
Please define the expected exception categories.
Is the requirement to use daily entered time to compile a biweekly timesheet for payroll submission or is there something additional that needs to be derived?
It appears the ICD to the GCIMS system is not in the appendix. Could you please provide a copy?
Please clarify what benefits plans are included on the statement? Are dental and vision included on the statement? Is the employer or employee costs included on the statement?
Could the government please clarify the meaning of "knowledge-sharing opportunities". Does this refer to a knowledge-sharing capability as part of knowledge management?
Can the government clarify the specific sources which will require interfaces? It is clear that an interface from the GSA financial system (Pegasys) is required. Are interfaces to other agency financial systems required? If so could you please provide the necessary documentation?
Could the government please clarify whether data from a staff acquisition system needs to integrate with core HR?
It appears the ICD for the Pegasys system was not included in the Appendix. Could the government please provide the necessary documentation?

Does the government expect the new performance management system to integrate with the “awards and recognition system”? If so where does this system reside and who is the current owner of the system.
Please clarify if this is full appraisals or ratings only? Also, could you please provide additional information to clarify the statement, “the appraisals will go through the standard awards-approval process”?
Please clarify the HR system to which the solution should integrate.
Please clarify if the forms referenced in this paragraph relate to Entrance On Duty and SF-52 and SF-50.
Please clarify if the forms referenced in this paragraph are related to Entrance On Duty and the SF52 and SF-50 form.
Please clarify whether there is a staff acquisition system and/or Entrance On Duty system that the HR system needs to integrate with.
Please confirm that the BI system referenced in this paragraph is the existing Business Objects solution.
Is there an existing or envisioned data warehouse for storing historical archive data?
Please confirm that providing certain payroll processing services (outlined in this requirement) is part of the role of the SSC and not a requirement of the agency?
Please clarify whether the government requires an interface to the Position Management Universe (PMU)?
What system is being referenced for this real-time, bi-directional interface?
Does this requirement reference the same position management system that is referenced in requirement GORGP065?
Does this requirement represent a function that the current payroll system does not perform, and therefore is desired in the new HR system?

Does this requirement represent a function that the current payroll system does not perform, and therefore is desired in the new HR system?
Are we correct to assume that the batch nightly updates from OPM's employee express would be to the new HR system instead of the payroll system?
Requirement GNFR035 listed in Attachment L indicates an interface between GCIMS and the SSC as defined in HRT2T Program Interface Control Document (ICD), but there is no GCIMS ICD. Would the government provide the ICD for GCIMS specifications at this time?

GOVERNMENT RESPONSE
See updated Section 1.2.2 of RFQ with added mandatory marking
All customers listed in Attachment K will be supported under managed services for CLINs X003. See updated RFQ Attachment K.
See updated Section 1.2.3 of RFQ with note clarifying CLIN X003
See updated subsections under 1.2 of the RFQ with updated task markings
See updated Section 1.2.3 of RFQ with added Labor Category/Hour/Hourly Rate table
Per the Definitions Tab in the amended Attachment L: "Mandatory requirements must be provided for GSA to accept the system. Optional requirements are those requirements that are useful for GSA or our partner agencies, but can be provided through the offeror's proposed solution or as an enhancement. These have no relation to "optional CLINs / tasks" in the PWS."
Contractors shall propose an appropriate number of administrators that should be designated and trained for each of the five entities, based on the total number of employees that will be supported in each of those environments as defined in Attachment K. The Contractor's solution shall propose an appropriate solution for end user training.
Section 2.2 states that "functionality requirements primarily fall within four HR LOB sub-functions" and that "other sub-function requirements can be found in Section 9 - Attachments L and M". Performance Management is in scope as defined in Attachment L.
See updated Section 11.11.5.1 ; bullet (H) of the RFQ
The Government is acquiring managed services through an OPM approved shared service provider, and therefore does not intend to acquire software licensing or a hosting environment.

See updated heading titles for 2.5.4, 2.5.5, and 2.5.6 in the RFQ.
Any Nessus reports with results of penetration testing performed by GSA would be provided to the contractor for corrective action. However, it is expected that contractors shall have its own software/licenses to perform these actions.
Yes, the Government will perform the penetration testing and system assessment/risk in conjunction with contractor to complete the initial ATO.
See updated heading titles for 2.5.4, 2.5.5, and 2.5.6 in the RFQ.
The Government expects a minimum of two locations; however, an exact number cannot be determined until after migration.
The scope of the referenced subtask includes only Tier 3 systems support. The references to Tier 1 and Tier 2 support have been removed from the requirements in the amended Attachment L.
The Government is responsible for Tier 1 and Tier 2 support personnel and will pass Tier 3 Systems Support issues to the contractor. The Government does not intend for end users to contact the contractor Tier 3 personnel directly.
Yes, 2.5.8 is one section of the RFQ that addresses security management.
The Government anticipates award in the first quarter of Government Fiscal Year 2017
The Deliverable table reference to a Data Cleanup Plan (Deliverable 24) in Section 2.5.3.5 is an error. See the updated Section reference to Section 2.5.4.2. The Data Migration Plan should include the data cleanup plan.
See revision in Section 7.1 of the RFQ.
See updated Sections of RFQ: 11.8 bullet (c), 11.9.1, 11.9.2, and the updated Key Personnel Qualifications Matrix template.

No RFQ changes will be made .
No RFQ changes will be made.
See RFQ Section 11.7 Submission of Offers for submission details. No adjustments will be made at this time.
New customer refers to a new CAB that GSA would be expected to support.
See updated Section 12.8.3 of RFQ with adjustment from Section H.2 to Section 7.1.
See updated RFQ Attachment Z - Pricing Workbook
The Government is acquiring a managed services through an OPM approved shared service provider, and therefore does not intend to acquire software licensing or a hosting environment.
See updated Attachment K in the RFQ, which removed duplicate entries.
Uptime refers to the amount of time the system is operational and accessible. Examples of utilization metrics include the percentage of users on the system at specific times, number of transactions processed in a given period, capacity utilization percentage for the various system resources; utilization metrics align to response time metrics for purposes of analyzing trends and issues
SecureAuth is the preferred authentication method. GAMS is not an available service.
This requirement refers to pay codes and accounting codes. The contractor shall propose a solution to address pay codes and accounting codes. The specific number of characters and values will be discussed during Fit/Gap Analysis

The minutes relates to hours worked per day and shall be restricted to one decimal place designating increments of an hour - i.e. 6.1 hours equals six hours and six minutes of work. This is an OPM defined requirement; please refer to OPM's website for additional information at the following link: https://www.opm.gov/services-for-agencies/hr-line-of-business/enterprise-architecture/#url=Business-Reference-Model
The T&A system will integrate with the payroll system (PAR) and PAR integrates with the financial system. Refer to the PAR ICD for T&A interfaces with the Payroll system.
This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
The T&A system will interface with the payroll system (PAR) and the new HR system acquired through this solicitation.
Please refer to the ICD for the Payroll, Accounting and Reporting System (PAR)
This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
GSA's current ETAMS system categorizes valid T&A exception codes into various categories such as 'Regular Scheduled Hours', 'Hours Used', 'Hours Earned,' 'FMLA', and 'Telework'. Final definitions and configuration values will be determined during Fit/Gap Analysis.
For people entering daily time, the total time must be calculated for the pay period for the payroll submission
See the added Attachment BB - GCIMS ICD, included in the amendment to the RFQ.
This is an OPM defined requirement; please refer to OPM's website for additional information at the following link: https://www.opm.gov/services-for-agencies/hr-line-of-business/enterprise-architecture/#url=Business-Reference-Model
This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
The ICDs attached in the RFQ (Attachments O-T, BB) contain all the necessary interfaces to and from the HR and T&A systems
Yes, data from a staff acquisition system needs to integrate with core HR.
The financial related information is sent from PAR to the HR system, and PAR has the interface with Pegasys. The vendor should review the PAR ICD for financial related information.

Both Performance Management and Awards and Recognition should be part of the HR solution provided by the contractor
The solution shall have the capability to upload full appraisal information and ratings, from data contained in attachments (i.e. spreadsheet), and once successfully loaded into the system, the appraisals should route through a GSA defined workflow approval route and adhere to GSA policy rules.
This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
This is an OPM defined requirement; please refer to OPM's website for additional information at the following link: https://www.opm.gov/services-for-agencies/hr-line-of-business/enterprise-architecture/#url=Business-Reference-Model
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Yes
This refers to a BI system that may be included in the contractor solution as well as a potential new interface with a current or future GSA BI solution.
There is a future data warehouse envisioned.
The requirement BEN074.02 was not contained in Attachments L1 and L2.
This requirement was included in error; it has been deleted from the amended Attachment L. There are additional requirements that were included in error; the Government has reflected these changes in the amended Attachment L.
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See the added Attachment BB - GCIMS ICD, included in the amendment to the RFQ.

PRICING WORKBOOK - ATTACHMENT Z

Price Quote Labor Hour Workbook Notes & Instructions

General

* Offerors shall add rows to provided worksheets as needed to fulfill the Government's instruction to allow space to respond. Fold-out documents are permissible for price quote hard copies.
* Offerors shall use the same format for defined fields in the Project Staffing Plan as they use fo Quote - Labor Hour Workbook, (e.g., if the "Post Migration Support" are formatted as a Numbe "Post Migraton Support" in the Project Staffing Plan shall also be formatted as a Number with z
* To the extent possible, Offerors shall preserve the sequence of rows in the Project Staffing Pla of corresponding rows in the Price Quote - Labor Hour Workbook.
* Offerors shall use formulas that are visible for Government evaluators and clearly convey the ca subtotals, totals, and other results. Worksheet cells shall not be locked.
* Offerors shall use explanatory notes to clarify the meaning of the Price Quote Labor Hour Work