

## Attachment G - FUNCTIONAL REQUIREMENTS TRACEABILITY MATRIX

The requirements listed below are not intended to be comprehensive; instead, the intent is to give the DOC a better gauge of the Offeror's experience, current capabilities, need for customization, reliance on third-party vendors, etc...

Legend—Key Codes
<b>A = Requirement already exists or can be configured to provide</b>
<b>B = Requirement provided via Third Party Software</b>
<b>C = Requirement can be provided via customization</b>
<b>N = Feature not provided</b>
<b>SC = See comment (used when other key codes not applicable)</b>

Requirements Key Code
<b>M= Mandatory</b>
<b>H= Highly Desirable</b>
<b>O=Optional</b>

Please indicate your current capabilities to provide each requirement by selecting the corresponding key code which is most applicable.

Ref #	Global Requirements	A	B	C	N	SC
GR 1	The software application shall have the ability to capture, store, and report on Community Correction's participant data collection					
GR 2	The software application shall create and store electronic data for each Community Correction's participant, which may include multiple offenses committed by that participant in multiple commitment periods.					
GR 3	The software application shall capture, store and report on all Community Correction's participant using their Community Corrections identification number issued by software to become a unique identifier for the system. Each participant-driven screen will display the number, name, and status of the participant.					
GR 4	The software application shall use prompts and error messages to assure that all required fields are completed with valid values					
GR 5	The software application shall allow the user to query and report information from prior commitments of the participant.					
GR 6	The software application shall capture, store and report special needs of Community Correction's participants					
GR 7	The software application shall capture, store and report release dates for all Community Correction's participants					
GR 8	The software application shall capture, store, and report aliases for Community Correction's participants					
GR 9	The software application shall include a free form text user interface that will allow a user to input unstructured notes on any participant and will maintain and report a historical record of the notes					

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GR 10	The software application shall capture, store and report completion of orientation received upon an Community Corrections participant's arrival to the agency					
GR 11	The software application shall record and track victim contact information and statements and provide application security to ensure information is secure					
GR 12	The software application will have highlight required fields and set variable as defined by the Community Corrections Quarterly and Annual Resource Manual					
GR 13	The software application shall track a Community Correction's participant change in status (as defined by the Community Corrections Quarterly and Annual Resource Manual including Actice, Transfers, Death. Escape, Inactive, Successful...etc					
GR 14	The software application shall flag/highlight specific data that changes on a Community Correction's participant. To include, at a minimum, release date changes and IRAS risk changes					
GR 15	All Community Correction's participant data shall be saved for historical and reporting purposes.					
GR 16	The software application shall be an participant-based application system, rather than a system based on a criminal case					
GR 17	All data shall be searchable using simple selection criteria methods. Search criteria, at a minimum, should include name, DOC number, SSN, alias, date of birth, and last known address and navigate directly to the selected record from the list of candidates when there is more than one match.					
GR 18	The software application shall capture, store, and report random and manual drug test management and compliance tracking of participants					
GR 19	The software application shall capture, store, and report drug testing results					
GR 20	The user interface shall be intuitive and standardized in operation throughout the system. Screens should be user-friendly.					
GR 21	On input and display screens, input shall be supported with selectable data wherever possible to ensure data integrity.					
GR 22	Input of a participant ID shall trigger population of all data fields on that screen for which data is currently available in the system. The entered participant shall remain current when navigating through the system until a new participant is selected.					
GR 23	The system shall support the viewing of all types of data, as both individual records and as groups of records.					
GR 24	The system shall provide workflow management capabilities.					
GR 25	The system shall maintain a transaction log file, automatically documenting date and time of data changes, as well as user ID of the person changing the data.					
GR 26	The software application shall generate time stamps and user tracking on all data entries and deletions.					
GR 27	The software application shall maintain an audit trail of the types of reports that have been generated.					
GR 28	The software application shall provide automated forms and templates					
GR 29	The system shall support both pre-defined and ad hoc reporting					
GR 30	The software application shall have the ability to run ad-hoc queries on participants, both active and inactive records, by a variety of criteria such as name (exact, partial, soundex), DOC number, DOB, SSN, etc.					
GR 31	The software application shall have the capability to produce management and statistical reports specific to cases and staff workload.					
GR 32	The software application shall give the user the ability to create parameter driven statistical reports					
GR 33	The software application shall generate responses from staff to standard Community Correction's participant inquiries using predefined templates					

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GR 34	The system shall support external interfaces.					
GR 35	The software application shall have the ability to 'pin' scanned original documents associated with each participant.					
GR 36	The software application shall have the ability to integrate with agency's e-mail calendar software for the purpose of scheduling (microsoft outlook, gmail, yahoo...etc).					
GR 37	The system shall interface with the DOC Planning Division statistical tool or reporting system.					
GR 38	The user interface shall support standard desktop interface principles supported by IOT					
GR 39	The software application shall have a user interface for on-line help					
GR 40	The system shall support an electronic signature mechanism, replacing handwritten signatures with electronic signature s and date/time stamps.					
GR 41	The software application shall have the ability to employ information stored in the application regarding the participant to create narrative supervision reports using pre-defined templates upon agency request.					
GR 42	The software application shall have the ability to employ information stored in the application regarding the participant to create narrative investigation reports using pre-defined templates.					
GR 43	The software application shall provide spell check functionality for all free form or narrative text boxes					
GR 44	The software application shall send electronic copies of the narrative reports and of letters and memoranda upon request					
GR 45	The software application shall have the capacity to capture, store, and report multiple digital images, audio, and video that can be associated with a participant's case file. At a minimum this should include participant photos, scars, marks, tattoos, investigation evidence.					
GR 46	Photo images stored in the system's database must be stored in compliance with IOT standards.					
GR 47	The software application shall provide interactive tools to allow the State system administrator to monitor all processes and queues, and to detect and correct system operational problems.					
GR 48	The software application shall encrypt data during all facets of data transmission.					
GR 49	The system shall be based on an architecture that maximizes system efficiency, resulting in minimal user response times during transaction processing.					
GR 50	The software application shall import and export data in an XML and CSV format.					
GR 51	The software application shall provide event-based triggers and alert messaging based on criteria further defined					
GR 52	The software application shall provide a graphical view of all housing locations in a given facility					
GR 53	The software application shall allow selected users to add, modify, or delete alerts					
GR 54	The software application shall capture, store and report alert information on a Community Corrections Participant					
GR 55	The software application shall be scalable to allow for inclusion of biometrics and use of hand-held devices					
GR 56	Alerts shall be compatible with and available on various types of devices					
GR 57	The software system application shall provide for extracting and exporting data into various standard file formats					
GR 58	All historical participant data from the current systems shall be migrated to the new system with the assistance of the new software system and vendor					
GR 59	The software application shall be able to distinguish between adult and juvenile participants, and keep juvenile data separate from adult data on juveniles who were incarcerated in both categories.					

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GR 60	The software application shall be able to handle adult and juvenile participants according to Indiana statutes pertaining to each type.					
GR 61	The software application shall be designed with the flexibility to accommodate annual legislative changes.					
GR 62	The software application shall incorporate all functionality currently available in DOC systems.					
GR 63	The software application shall provide tools for database ad hoc query and manipulation by DOC System Administrator for data corrections and evaluation purposes.					
GR 64	The software application shall interface with the participant locator web site for public access of participant data.					
GR 65	The software application shall allow for integration with the existing victim notification system					
GR 66	The system will track participants based on three identification numbers (A system generated Community Corrections Number, and if available DOC number, FBI number)					
GR 67	System shall track participant medical visit history (Dates)					
GR 68	System shall utomated staged approval process (E.G. Approval chain with electronic signatures for Funding Changes, etc) complete with email notifications to appropriate parties					
GR 69	System shall have ability to enter program information (descriptions, completion requirements, contact information, number of currant participants, waiting lists, availability dates, etc) based on each communities available programs					
GR 70	System shall allow the ability to close components not the case (thus preventing duplicate reporting for programs/components)					
GR 71	System shall have the ability to flag participants being supervised/held for DOC to ensure proper billing amounts and time frames					
GR 72	System shall have a large help portal for product					
GR 73	System shall provide data integrity checks for items such as financials, population, employment information, etc					
	<b>Security Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
SR 1	The software application shall be capable of immediately terminating an end-user's session(s).					
SR 2	The system shall support the interface with an appropriate identification/authentication system with role based security and a single login.					
SR 3	The software application security scheme shall report on user activities and access to system software application and subsystem components. In particular, details for each record addition, edit, and deletion shall be available for review					
SR 4	The software application shall be capable of assigning security access by user, role and/or group. Users may have access to one or more role and/or group					
SR 5	The software application shall assure that each staff member shall have a unique ID and password combination					
SR 6	The software application shall include a security matrix that defines access to screens for specific user groups					
SR 7	The software application shall be able to limit the tasks available to a particular user and/or group of users.					
SR 8	The software application shall allow the System Administrator to enforce record access to archived data through user profiles					

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SR 9	The software application shall classify corrections data by security classification and control user permissions for viewing the classified data according to level of data and user classification. At a minimum, Community Corrections confidential information related to mental health records, HIPPA, and STG data will be limited to appropriate staff.					
SR 10	It shall be possible to set security levels in the software application according to variables that include user, user group, table, data element, and screen					
SR 11	The software application shall be able to limit user security to adult or juvenile data as appropriate.					
SR 12	The software application shall enable users to view unclassified data on all participants, but modify data only on participants at their location. System Administrators will be able to modify data on all participants, as needed.					
SR 13	The system shall have easy customizable ability to add levels of users and assign user permissions (this should be based on a hierarchy of employment)					
SR 14	The software application shall have the ability to limit and lock a Community Correction's Participant information with capabilities to access by designated Administrator in DOC					
SR 15	System Administrator and permissions hierarchy to be determined by the Indiana Department of Correction.					
	<b>Adult Intake Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
IR 1	The software application shall provide a reference table to support a dictionary of charges and charging language approved by state statute.					
IR 2	The software application shall capture, store, and report on existing warrant and detainers data upon criminal history search, any of which would prohibit a release without additional verification					
IR 3	The software application shall provide a user interface to enter and track scars, marks, and tattoos					
IR 4	The software application shall provide a user interface to enter last known address, preferably with integration with the USPS for address verification					
IR 5	The software application shall provide a user interface to enter previous employment information, preferable with integration with DWD for employment verification and tracking after release					
IR 6	The software application shall enable the intake officer to search on any entered information in order to retrieve previous incarceration history					
IR 7	The software application shall provide a user interface for participant property inventory data capture, storage and reporting of personal property in a searchable format.					
IR 8	The software application shall capture, store, and report a participants' seized property					
IR 9	The software application shall automatically generate, capture and associate with a participant, bar codes for tracking documentation and paperwork, participant movement and location, and participant property					
IR 10	The software application shall provide a final verification when a Community Correction's participant has completed the intake process and is ready for transfer and awaiting completion of the process					
IR 11	The software application shall capture, store, and report on a Community Correction's participant demographic information					
IR 12	The software application shall support a workflow process that will assist intake staff with completing their respective tasks, while alerting other staff that they have pending duties for a respective Community Correction's participant					
IR 13	The software application shall correlate the Community Corrections participant's date of arrival and a sentence received and alert the case manager if the Community Correction's participant has already served his/her sentence					

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IR 14	The software application shall have to include, at a minimum, the following required forms for data entry: Court Commitment, Progress Sheet, Photograph and Fingerprints, Initial Security Classification, Program Eligibility, Screening Sheet, and Participant Sheet					
IR 15	The software application shall capture, store and report whether and when a participant has previously undergone DNA testing					
IR 16	The software application shall capture, store, and report on the Pre-Sentence Investigation (PSI)					
IR 17	The software application shall have a user interface to identify and combine a case with its PSI					
IR 18	System should provide prompts on Gang Affiliation Conflicts upon intake					
	<b>Juvenile Intake Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
JI 1	The software application shall capture prior court contact history, including DOC adjudications					
JI 2	The software application shall include automated assessment tools for risk and needs classification					
JI 3	The software application shall provide for the gathering of commitment and demographic information, including scars, marks, tattoos, and photos					
JI 4	The software application shall provide a reference table to support a dictionary of charges and charging language approved by the Indiana judiciary					
JI 5	Ability to track assessment scores and any changes in them over time and if necessary over programs and facilities. (Inherited scores, post program scores)					
	<b>Case Management Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
CM 1	The software application shall capture, store, and report selections and results of the various risk assessment tools for both adults and juveniles					
CM 2	The software application shall provide a Case Management section that will capture case notes and generate reports					
CM 3	The software application shall have the ability to conduct searches of case management related information					
CM 4	The software application shall be able to interface with systems of vendors providing outside treatment.					
CM 5	The software application shall show a thumbnail photograph of the defendant on every case management screen					
CM 6	The software application shall display name, ID#, current location, case#, and case manager on every case management screen					
CM 7	The software application shall provide the ability to monitor each case manager's schedule, workload and performance to ensure appropriate distribution of cases					
CM 8	The software application shall capture, store and report substance abuse testing dates, status, location, chain of custody, and results for each participant					
CM 9	The software application shall generate a report, when requested, on case managers compliance with a predefined evaluation and identify delinquent entries					
CM 10	The software application shall provide the ability for administrators to assign caseloads.					
CM 11	The software application shall be able to produce random lists of participants based on specific criteria.					
CM 12	The software application shall provide tools to assist in the development of a plan and schedule for programming for a given participant					
CM 13	The software application shall capture, store and report various types of participant assessment scores.					

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CM 14	The software application shall capture, store and report eligibility and changes in a waiting list for program assignments and services					
CM 15	The software application shall allow a free form Notes entry, that includes spell check functionality.					
CM 16	The software application shall provide a list of all valid programs, facilities where each is offered, and related data.					
CM 17	The software application shall have the ability to lock case notes to assure they are not altered by anyone but their originator					
CM 18	The software application shall allow specified treatment data to be shared with outside state agencies for reporting and resource purposes					
CM 19	The software application shall have the ability to generate an overall Case Management plan based off of the IRAS identified criminogenic needs with the ability to track goals and objectives to meet and complete a case plan. Case plan shall be able to be modified and add progress notes and additional objectives throughout the case stay.					
CM 20	The software application shall differentiate between informative/decision-based/ and action-based triggers when alerts are sent and provide prompts for case managers to complete any actions required					
CM 21	The software application shall allow a user to update existing information in the participants' program participation data					
CM 22	The software application shall track all referrals and recommendations for programming and related information					
CM 23	The software application shall track programming efforts including, at a minimum, education, addictions, cognitive behavioral groups, and vocational training					
CM 24	The software application shall have each agency have the ability track program referrals, based on at a minimum, date, reasons for creating them and responses to them.					
CM 25	The software application shall provide for capture, storage, reporting of and electronic submission of the Case Plan to Parole/Probation/CTP/Service providers in preparation for release/discharge					
CM 26	The software application shall interface with data from the external risk assessment system .					
CM 27	The software application shall provide the ability to move a participant between case managers					
CM 28	The software application shall provide the ability to move caseloads from one case manager to another.					
CM 29	The software application shall provide waiting lists, enrollment lists, and completion lists for all types of programs. Completion types should be tracked.					
CM 30	The software application shall capture, store, and report on data within the drug testing process. This would include quality control and billing verification.					
CM 31	The software application shall provide tools that will enable data analysis for program productivity and effectiveness measures.					
CM 32	Incorporation of listed items in the Community Corrections Report Resource Manual					
CM 33	Ability to track employment changes, to allow for easy determination of employment rate for different population groups (Work Release Employment). This would be done on a monthly level based on preset criteria (date of arrival, etc)					
CM 34	Ability to track education changes					
CM 35	Ability for courts to submit approvals and denials via uploading them					
	<b>Community Correction's Participant Release Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>

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RR 1	The software application shall generate an alert for any Community Correction's Participant who has any open detainers or warrants to assure that he or she is not released until all cases have been addressed/closed					
RR 2	The software application shall include a module to capture, store, and report on warrants and detainers					
RR 3	The software application shall, near the end of the incarceration period, generate the required release paperwork, based on predefined criteria, and release/discharge plan, if applicable					
RR 4	The software application shall capture, store, and report on eligibility for release planning activities.					
RR 5	The software application shall automatically capture, store and report the date a case is terminated at the agency.					
RR 6	The software application shall capture, store, and report the community provider the participant is referred to based on a predefined imported list					
RR 7	System would have the ability to interface with the state data systems that manage PO's.					
	<b>Adult Sentencing Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
AS 1	The software application shall have the ability to calculate, based on customized algorithms and pre-defined credit levels, earned credits for a given sentence					???
AS 2	The software application shall store, display, and track data on sentencing, including separate and aggregate sentences as well as the results of interruptions to sentences by factors including escape, parole, court release, etc.					
AS 3	Participants sentenced in adult court are subject to adult sentencing rules. Participants adjudicated in juvenile court follow juvenile guidelines for length of stay.					
AS 4	The software application shall allow the user to capture, store, and limit the number of credits depending on the date sentenced and prior credits earned.					
AS 5	The software application shall have the ability to capture, store and report the number and type of credits earned					
AS 6	The software application shall have the ability to track and recalculate release dates based on the application of time earned/served and sentence changes.					
AS 7	The software application shall have the ability to maintain history on sentence release dates for each action applied.					
AS 8	The software application shall calculate, store, and report on the projected release date and maximum release date for each sentence, as well as entire community supervision sentence.					
AS 9	The software application shall be able to accurately handle calculations on sentences that are any combination of consecutive or concurrent in order.					
AS 10	The software application shall be able to recalculate credit time related data when sentence modifications are made.					
AS 11	The software application shall have an internal edit function that has the ability to prevent the award of credits when an participant is not eligible to receive them, based on predefined criteria					
AS 12	The software application shall report all types of credits already awarded totaled by type of credit and then grand totaled					
AS 13	The software application shall have the ability to capture, calculate, and report the participants's fixed term of confinement if sentence modifications are made.					
AS 14	The software application shall have the ability capture, store and report the number of days out of custody and calculate the remaining balance of the term for each type of release					
AS 15	The software application shall have the ability to adjust the balance of earned credits in the event that the participant violates his/her terms of supervised release					

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AS 16	The software application shall have the ability to calculate and revoke any or all of the participants' previously earned credits					
AS 17	The software application shall have the ability to apply only designated earned credits, based on predefined criteria					
AS 18	The software application shall calculate, store, and report on the effective date of sentence for each sentence based on factors that move the date time starts.					
AS 19	The participant's release date will be based on the latest projected release date of each sentence assigned.					
AS 20	The software application shall be able to automatically end sentences when appropriate and start consecutive sentences per predetermined criteria in Indiana statutes.					
AS 21	The software application shall calculate, store, and report on data pertaining to the committing court.					
AS 22	Easy method of determining in a report if the participant is serving a concurrent or consecutive sentence					
AS 23	Include IC Code tracking					
	<b>Juvenile Sentencing Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
JS 1	The software application shall allow a designation of determinate or indeterminate for juveniles. Determinate sentencing, if specified by the judge, will involve specific time requirements of age or incarceration duration.					
JS 2	Release dates for juveniles with indeterminate designations shall not be calculated.					
JS 3	The software application shall calculate, store, and report on data pertaining to the committing court.					
	<b>Participant Job Tracking Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
JT 1	The software application shall capture, store, and report a Community Correction Participants employment history and current dynamic employment information with the ability to have multiple employers					
JT 2	The software application shall capture, store, and report on idle job status. It shall also track the extended reason for the status, if any.					
JT 3	The software application shall allow supervisors to track hours Community Service Hours worked and performance criteria.					
	<b>Community Correction's Participant Movement Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
MR 1	The software application shall capture, store and report a Community Correction participant's supervision history, including curtesy transfers, DOC history...etc					
MR 2	The software application shall maintain transfer lists and report transfers among agencies.					
MR 3	The software application shall track housing assignments and bed changes within a given work release facility.					
MR 4	The software application shall prevent duplication of bed assignments for work release facilities.					
MR 5	The software application shall have the ability to capture, store, and report the number of days a Community Correction's participant has been on escape status.					
MR 6	The software application shall capture, store, and report records related to when, why, and where a Community Correction's Participant is transferred, released, or change in completion status as defined by the Community Correction's Quarterly and Annual Resource Manual					
MR 7	The software application shall be able to track data on a Community Correction's participant's temporary movement outside a facility.					

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MR 8	The software application shall have a scheduling ability to track, record, and create reports for a Community Correction's schedule including Work schedule, Treatment schedule, Community Service, Emergency Medical. The schedule needs to have a description of the event as well as the author with the date and time range for the approved event.					
MR 9	The software application shall have the ability to alert case managers, security, and supervisors of a participant who enters into violation by not returning within scheduled time. The parameters of the violation shall be modified and determined by the supervising agency.					
MR 10	The software application shall confirm the results of periodic participant counts taken throughout the day at each agency with Work Release. It should coordinate count totals with the system's participant assignments to verify physical participant locations.					
MR 11	The software application shall have the ability to store, track, and report on Community Correction's Participants who are on escape or abscond status.					
MR 12	The software application shall be able to produce an automatic escape template for each participant.					
MR 13	The software application shall provide pertinent data to enable staff to evaluate a Community Correction's participant for a high risk designator.					
MR 14	The software application shall have the ability to store, track, and report on participants who have a high risk designation.					
MR 15	The software application shall allow for status confirmation prior to transport on participants with scheduled intra-facility movement.					
MR 16	The software application shall include a scheduling function that tracks participant activities. This would include work and program schedules as well as periodic meetings and appointments					
MR 17	The software application's scheduling module shall be able to produce work schedules, count letters, and appointment calendars for individual staff and participants.					
	<b>Document Generation Requirements and Storage</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
DG 1	The software application shall have the ability to create a separate location for all (DOC required) documents with the ability to upload Microsoft Word documents, Microsoft Excel and CSV files, and PDF files.					
DG 2	The software application shall have the ability to store a library of common templates distributed by DOC including the Grant template, Financial Report Template, Annual Report Template...etc					
DG 3	The software application shall be able to send out alerts and reminders from the Department of Corrections for announcements, submission requirements, and new template information					
DG 4	The software application shall have the ability to store a library of DOC procedural manuals					
DG 5	The software application shall have the ability to display agency wide reports as announcement after each quarter and annual data submission					
DG 6	Alternatively provide an interface to a third party document management system.					
DG 7	Provide the ability to save documents as a PDF to prevent modification.					
DG 8	Provide the ability to lock documents (e.g., MS Word and Excel) upon completion. An administrator should have the ability to unlock the report at which point a reason should be indicated.					
DG 9	All documents will stored for the legally required length of time.					
DG 10	The software application shall have the ability to create, indicate as approved, and maintain support of Indiana DOC policies and procedures and upload and store agency's policies and procedures.					
	<b>Financial Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>

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FR 1	Ability to establish and update a complete record for each case for which a financial obligation is indicated by entering a Community Correction's participant and victim information, amount owed, case information, payment schedule, payment posting and receipt generation					
FR 2	Ability to make upward or downward modifications to the original obligation, documenting the date and reason, on an individual and batch basis, and track such modifications with an audit trail.					
FR 3	Ability to capture free-format comments related to obligations.					
FR 4	Financial package able to collect multiple fee types in 1 transaction with 1 receipt					
FR 5	Ability to track financial transactions for participants (E.G. - if participating in Work Release the system will need to track net income, State/Federal taxes, Victims Compensation, Commissary, Savings Accounts)					
FR 6	Ability to track Community Corrections financial data (E.G. - Grant Funding/Request and Transactions, Salary Data, Sources of Income, Sources of Payments, Medical)					
FR 7	Ability to identify participants participating in Work Release/CTP and track billing information and participation dates					
	<b>Miscellaneous/Communications Requirements</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
MC 1	The system shall be able to report on correspondence details, including identifying the number and types of correspondence pertaining to any given participant including Phone Call, Field Visit, Office Appointment, and Face to Face contact.					
MC 2	All Reports, Schedules, and Case plans should be printable					
MC 3	Support digital and/or electronic signatures on documents produced by the system					
MC 4	"Dashboard" upon login.					
MC 5	Include spell check function for memo/note and comment fields.					
MC 6	Provide cut and paste capability from data fields and screens to other applications.					
MC 7	Support single point of entry for all data (data does not need to be entered in multiple locations).					
MC 8	System shall be user-friendly and flow logically from screen to screen from initial intake through the close of the file/case.					
MC 9	Technical specifications, server needs, system requirements, speed of system, # of concurrent licenses, and platform management specifications need to be determined. Including a reasonable update plan for changing laws and requirements.					
MC 10	Cost of Initial Data transfers from other platforms (Vendor platforms specific to individual counties)					
MC 11	Cost of Ongoing maintenance and updates					
MC 12	Easily and readily modifiable & expandable for new programs					
MC 13	Modifications due to state or grant requirements at low cost or included in monthly maintenance					
MC 14	Creation of unique Community Corrections ID					
MC 15	When viewing a participant record, it must be easy to identify the correct participant record is open (Pertinent identifying info and thumbnail photo on each screen)					
MC 16	System training/training documents will be provided to end users					
MC 17	Ability to integrate with current and future DOC systems (SAVIN, OCMS, TOMS)					
	<b>Vendor Support</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
VS 1	Provide annual renewable maintenance and support contracts for a fixed fee that includes providing ongoing technical support and all software releases (updates, upgrades, new version releases).					
VS 2	Provide technical support during normal business hours.					
VS 3	Provide technical support during non-business hours.					
VS 4	Provide annual user group meetings.					

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VS 5	Designate a specific employee or team to serve as the vendor's liaison with each county Agency as well as the Department of Correction					
VS 6	Maintain a customer accessible web based reporting tool for technical support/enhancement requests by the agency.					
VS 7	Provide support for all existing external interfaces.					
VS 8	Ability to migrate/convert data from existing Community Corrections system (including Quest, CSI, and PBS) with option to archive closed files into the new system					
	<b>Department of Correction-Agency Collaboration</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
DC 1	Allow access by Research Analysts of the Department of Correction to create queries and export ad hoc and standardized reports					
	<b>Schedule &amp; Calender Capabilities</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
SC 1	The software application shall have the ability to produce a schedule in a calender for participants with a description for the date of the event (Ex. Work Schedule, Community Service, Reward Time, Job Search, Emergency Medical Release, Court Hearings, Scheduled Appointment...etc) with the date, time allotted, location name, destination address, travel time, mode of transportation, and who approved the event.					
SC 2	The software application shall have the ability to alert the assigned case manager and designated users if the participant has not returned within the scheduled time					
SC 3	The calender will have the ability to print the participants scheduled events and sort the events by topic and limit what events are printed on the calender.					
SC 4	The calender will have the ability to limit assigned designees for permissions to enter and adjust schedules for each agency					
SC 5	The calender will have the ability to provide an alert if a scheduled appointment conflicts with another scheduled appointment.					
SC 6	The calender will have the ability to limit access to the type of event displayed in the scheduled (Example: Field Visit, Employment Check)					
SC 7	The software application shall have the ability to lock events once entered from editing with capabilities for override by the approved Adminsitrator and an option for a comment for the reason for the override.					
	<b>Reporting</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>N</b>	<b>SC</b>
RP 1	Ability to print and export reports for all levels of client (Participants, Case Managers, Parole, Administrators, DOC)					
RP 2	Ability to create ad hoc reporting with adjustable date or date ranges based on the Annual & Quarterly Resource Manual required variables or retrieve information necessary as designated by the Grant by selecting areas/categories and exporting them to PDF or a printer					
RP 3	Ability to track bed availability (Work Release Facilities only)					
RP 4	Ability to track employee position openings, current filled positions, and filled positions along with dates of postings and fill					
RP 5	Minimize risk of participants being counted as duplicates in various reports (based on ranking hierarchy of priority)					
RP 6	Display breakdown classifications and counts of felony's (FD, FB, Lvl 1, weapon involved, drug)					
RP 7	Ability for Community Corrections DOC personnel to pull reports for each agency					
RP 8	Ability to schedule reports that are to be submitted repeatedly					

## Attachment G - FUNCTIONAL REQUIREMENTS TRACEABILITY MATRIX

RP 9	The software shall have the ability to produce reports based on catagorized interactions with the participant that include the date and time					
RP 10	The software application shall have the ability to generate at random participants in need for employment and field visits based on Risk Level, Last Field Visit, and if available per their schedule.					
RP 11	Grant application complete snapshot including grants applied for, application status, funding amount, etc.					
RP 12	Site Assessment Checklist					
RP 13	Fiscal Audit Information					
RP 14	Funding Formulas					
RP 15	Annual Reporting					
RP 16	Quarterly Reporting					
RP 17	Weekly snapshot reporting					
RP 18	Financial Reports					

RP 19

Legend—Key Codes
<b>A = Requirement already exists or can be configured to provide</b>
<b>B = Requirement provided via Third Party Software</b>
<b>C = Requirement can be provided via customization</b>
<b>N = Feature not provided</b>
<b>SC = See comment (used when other key codes not applicable)</b>