Enterprise File Storage (EFS) Program Expansion

Performance Work Statement (PWS)

Date: June 2026

C.1 BACKGROUND

The purpose of this acquisition is to award a contract for program support services related to the ongoing development, testing, maintenance, and enhancement of the Enterprise File Storage (EFS) Digitization/Pega Platform.

Every year, the Internal Revenue Service (IRS) receives millions of pages of forms and correspondence via mail and fax. The mailed in forms are logically received as paper and need to be digitized. For the forms received via fax, the IRS prints these documents and then manually processes them up through and including archiving. This legacy methodology is cumbersome, limits employee ability for flexible work, and stunts IRS progress towards modernized automation tools to reduce human workloads.

This contract shall support key IRS modernization efforts with the expansion of IRS's EFS program by enabling the completion of the 18 workflow requests that are currently listed on the EFS backlog list. The contractor will complete 6 new workflows each year while ensuring the newly completed workflows and the following existing EFS workflows are supported and enhanced:

Enterprise File Storage Existing Workflows

- Centralized Authentication File (CAF): digitalization of Form 2848, Form 8821, and Form 706
- U.S. Certification of Residency: digitalization of Form 8802
- Employer Identification Numbers (EIN): digitalization of Form SS-4 and Bank list EINs
- Income verification transcripts (IVES): Form 4506C
- USDA: Form CCC-941
- Return Integrity Verification Operations (RIVO):
    - Automated Questionable Credits (AQC): LTR 4800C, LTR 3219C, LTR 105C, LTR 106C, LTR 131C
    - Taxpayer Protection Program (TPP): LTR 135C, LTR 18C, LTR 418C, LTR 4883C, LTR 5071C, LTR 5447C, LTR 5747C, LTR 6167C, LTR 6330C, LTR 6331C
    - Withholding Only Work (WOW): LTR 916C, Notice CP 05A

The new workflows will consist of three low complexity workflows, two medium complexity workflows, and one high complexity workflow in the base period and each option period. A low complexity workflow is a straightforward workflow with minimal branching and few dependencies. A medium complexity workflow is a workflow with multiple paths, business rules, approvals, and some integrations. A high complexity workflow is a workflow involving extensive business logic, multiple integrations, dynamic routing, and complex exception handling.

The Contractor shall provide services to expand EFS digital capabilities, leverage AI and automation for case analysis and resolution, and modernize core case management

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systems to enable scalable, enterprise-wide solutions. Specialized contractor expertise is required to maintain existing projects, deliver on new projects and perform system integrations that involve software development of IRS' specific systems. IT requires qualified contracting support that has significant experience with IRS' IT mission, evolving initiatives, Pegasystems Cloud for Government (PCFG), EFS programs and the IRS processes and tools required for development and support.

This will continue to enable paperless workflows for the processing of over 60 million pages of critical taxpayer service inventory and provide the stable and flexible technical foundation for additional printed paper inventories to be added to the expanded platform, such as Document Upload Tool (DUT), Taxpayer Digital Communications (TDC) eGain, Zero Paper Initiative (ZPI) and scanned paper. This functionality will allow for true First In-First Out (FIFO) processing to address longstanding challenges raised by oversight organizations and ensure the IRS follows the Office of Management and Budget (OMB) and National Archive and Records Administration (NARA)'s mandate to eliminate paper archiving.

C.2 OBJECTIVES

The objective of this contract is to provide ongoing development, support, testing, enhancements and upgrades to the EFS program. Section C.3 of this Performance Work Statement (PWS) describes the scope and expectations for the EFS orientation briefing, contract management, knowledge ramp up, Pega configuration, workflow testing, and transition.

The tasks in this PWS are set up in a phased approach with the objective of eventually handing off to Agency operations personnel, while allowing for new development through contractor Subject Matter Experts (SMEs). The IRS requires SMEs with specific skillsets in software development, application integration, and architecture and engineering for the Legacy and future platforms for the EFS programs at the IRS. It allows for use of contractors for specialized efforts with the end goal of handoff to the Agency.

The contractor shall provide ongoing operations, maintenance and support for the EFS program. The contractor shall support new workflow initial Minimum Viable Product (MVP) delivery, stakeholder engagement, iterative enhancements, and a phased knowledge and ownership transfer. The framework must be scalable and can be applied to all EFS workflows, including EFS workflows in production and EFS workflows that will be developed in the future.

C.3 SCOPE OF WORK AND DESCRIPTION OF TASKS

The contractor shall provide development teams to provide support for ongoing EFS program operations, maintenance, and rapid delivery of fully functional, compliant MVPs using the Pega platform. The contractor shall provide SME and technical support to IRS task leaders and project managers. The contractor shall provide a Development Organization chart depicting software development roles such as Scrum Master, Product Owner, Senior/Junior Developer, and Tester (names of individuals are not required). The development team shall report to the contractor's Program Manager.

The contractor shall deliver the following 18 workflow requests that are currently listed on the EFS backlog list:

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Prioritization	Name	Complexity Level	Description
1-Base Year	Unidentified & Misapplied Payments	medium	Build and install customized EFS paperless electronic workflow to consolidate, centrally manage, assign, and monitor unidentified payments, including the development of electronically generated reports that can be used to efficiently evaluate case management data.
2-Base Year	Form 1310-Decedent Return Refund	High	Build and install an EFS paperless electronic workflow, receiving, routing and processing the Form 1310 to include integration of EEFax and ZPI Inventory. Forms 1310 submitted with returns cause Code and Edit to put Computer Condition Code L or W on the return record, affecting how the refund is treated by IMF when the return posts. The CCC will cause the refund to be issued to the secondary name line and the 1310 stays with the return. These refunds do not need attention from AM. If the 1310 is sent as a loose document, then it gets routed to AM and is worked as correspondence, usually in response to AM working Transcript 46 cases (refund frozen because the taxpayer is deceased).
3-Base Year	RIVO (Group 2)	low	Add RICS RIVO FRP, BMF IDT and Entity Fab inventories to RICS RIVO EFS workflow including EEFax, ZPI and DUT integration
4-Base Year	TPP - DocAI	low	This is the introduction of DocAI for the TPP inventory that would extract the information from the incoming cases and populate them into the RIVO workflow, saving a great deal of effort for the clerks.
5-Base Year	ZPI Workflows Low Complexity	low	Build and install customized EFS paperless electronic workflow to receive scanned data files from ZPI. Integrate with ZPI/DIM and other backend solutions to send back misrouted files. Customized based on requirements gathering from the customer.
6-Base Year	USCerts Database Integration	medium	Integration of the US Certs workflow directly with the USCerts Database to reduce manual data entry and enable further automation of cases.
7-First Option Year	eClas Integration	high	eClas integration would be the highest level of integration beyond IAT and enabling a full connection and data exchange between the workflow and backend systems.
8-First Option Year	ZPI Workflows Medium Complexity	medium	Build and install customized EFS paperless electronic workflow to receive scanned data files from ZPI. Integrate with ZPI/DIM and other backend solutions to send back misrouted files. Customized based on requirements gathering from the customer.
9-First Option Year	EIN IAT Integration	low	This is the next level of integration for EIN and would leverage the data provided by the DocAI for EI and enabling the automation and integration between the workflow and backend systems.

10-First Option Year	SP ERS Clerical Correspondence	low	Build and install EFS paperless electronic workflow for ERS Clerical Correspondence inventory including EEFax, secure messaging and ZPI integration.
11-First Option Year	BMF Entity Class for Corporations	low	Build and install EFS paperless electronic workflow for BMF Entity Class for Corporations inventory to include EEFax, DUT and ZPI integration.
12-First Option Year	SP RAIVS	medium	Build and install EFS workflow for RAIVS programs to include SBA, UN, LEAP, Ten Day and Photocopy inventories, to include EEFax, ZPI and DUT integration.
13-Second Option Year	ZPI Workflows High Complexity	high	Build and install customized EFS paperless electronic workflow to receive scanned data files from ZPI. Integrate with ZPI/DIM and other backend solutions to send back misrouted files. Customized based on requirements gathering from the customer with system integration.
14-Second Option Year	AM FIRPTA	low	Build and install EFS paperless electronic workflow for Foreign Investment in Real Proper Tax (FIRPTA) inventory to include EEFax, ZPI and DUT integration.
15-Second Option Year	BMF Entity Programs added to BMF Entity	medium	Build and install additional BMF Entity program inventory workflows to the BMF Entity Class for Corporations EFS workflow; Form 8832, BMF Entity Correspondence and IMF Entity Control, BMF Entity Unpostables, to include EEFax, ZPI and DUT integration.
16-Second Option Year	RICS RIVO Gp3	low	Add OARS and Bank Leads to RICS RIVO EFS workflow inventories, including EEFax, ZPI and DUT integration as well as integration within RIVO inventory streams to identify and consolidate in-process cases with OARS inventory.
17-Second Option Year	Form 4442	low	Build and install EFS paperless electronic workflow for Form 4442 Referral process: to include EEFax and all other delivery channels and IAT integration as well as multiple BOD case status capability
18-Second Option Year	ITIN	medium	Design, development, and implementation of a modern, technology-enabled workflow to digitally process the Form W-7, including integration of RTS.

The new workflows and integrations may include but are not limited to EFS integrations and partnerships with the Document Upload Tool (DUT), Taxpayer Digital Communications (TDC) eGain, Zero Paper Initiative (ZPI), scanned paper, AI initiatives, and other initiatives to improve the taxpayer experience. The Program Manager is responsible for the product deliverables for each workflow.

The contractor shall provide personnel who will be able to obtain and retain IRS clearances at the moderate level or above, and well-versed in IRS' EFS solutions as well as the Agency architecture to allow for collaboration between solutions.

The contractor shall assist the EFS program manager and IT program teams with development of customized presentations and reporting for program stakeholders and management as well as preparation of white papers, documentation, and budgeting that addresses business and IT sponsored modernization solutions. The contractor shall

report on project status and risks as required. The contractor shall provide Analysis of Alternatives to modernize legacy systems in addition to Return on Investment (ROI) and cost savings analysis as necessary. The contractor shall work directly with the business and stakeholders around the Agency, leading meetings as required and providing communications of project status as necessary.

The Agency will provide personnel to manage the EFS systems for eventual transition. A transition plan will be developed within 15 days after Agency personnel are provided. Any software or processes developed must conform to the Section 508 standards.

Firm-Fixed Price (FFP) Tasks:

- Task 1 Orientation Briefing
- Task 2 Contract Management
- Task 3 Ramp-up Knowledge Transfer/Transition in
- Task 4 Pega Configuration
- Task 5 Testing Support
- Task 6 Transition Support

C.3.1 Task 1: Orientation Briefing

Within two weeks of contract award, the Contractor shall conduct an orientation briefing for the Government. The Government does not desire an elaborate orientation briefing, nor does it expect the Contractor to expend significant resources in preparation for this briefing. Rather, the intent of the briefing is to initiate the communication process between the Government and Contractor by introducing key contract participants, explaining their roles, reviewing communication ground rules, and assuring a common understanding of contract requirements and objectives.

The orientation briefing shall be held at the Government's facility, and both parties shall mutually agree upon the date and time.

The completion of this briefing shall result in the following:

a) Initiate communications between the Government and Contractor and assure a common understanding of contract requirements, objectives, and expectations. Delivery of required Orientation Briefing materials and briefing minutes to the Contracting Officer’s Representative (COR) after the briefing.

b) The Contractor and Government personnel who will perform work under this contract will be introduced.

c) The Government will show the applicable facilities to the Contractor if the Contractor will be performing work on the Government's site.

d) The Government may provide any Government-Furnished Property (GFP) to the Contractor at this time.

e) Any issues concerning the Contractor clearances for Contractor personnel will be discussed.

DRAFT

f) The Contractor shall demonstrate confirmation of their understanding of the work to be accomplished under this contract PWS.

g) The Contractor shall provide the accounting period end dates to be used for the term of this contract.

h) The Contractor shall provide a list of Key Personnel (See C.3.8).

i) The Contractor shall take minutes during the orientation meeting and document the key points of discussion, action items and who will perform them as well as who was in attendance.

DESIRED OUTCOME: Initiate the communication process between the Government and Contractor and assure a common understanding of the contract requirements, objectives, and expectations; delivery of required Orientation Briefing materials and Briefing minutes to the COR after the Briefing.

C.3.2 Task 2: Contract Management

The Contractor shall provide contract management support to ensure uninterrupted performance of the current program portfolio's solutions/products. The Contractor shall ensure the IRS-identified staff receives the knowledge and skills needed to maintain the portfolio's solutions/products designed, maintained, tested, and implemented. The Contractor shall ensure all personnel performing any work in this effort maintain a Medium Level Minimum Background Investigation (MBI) clearance

Specifically, the Contractor shall provide the following support services:

C.3.2.1 Subtask 2.1: Task Management Support

a) Provide contract management and oversight.
b) Effectively and efficiently develop, monitor, update, and manage the Program and Performance objectives and tasks, as it moves toward successfully achieving its goals to enhance accountability, participation, and transparency.
c) Attend and actively participate in stakeholder meetings, as needed, to discuss activities regarding the status of the current Portfolio's solutions/products.
d) Perform ad-hoc requests including but not limited to contract financial reports, presentations, and other reports in support of the Portfolio's Solutions/Products at the direction of the COR and / or the technical point of contact.
e) Provide a monthly summary of work performed, including a list of deliveries submitted to the government. This report shall be submitted along with the monthly invoice to the government
f) Identify and report all risks and issues encountered, escalate as appropriate.
g) The contractor shall provide an annual Period of Performance summary of work performed, including a list of deliverables, at the end of each Base and Optional Period of Performance. The Government also reserves the right to request this report at any point during the performance of the order at the

DRAFT

discretion of the Contracting Officer. This ad hoc report, if desired, will only be requested once during the life of the contract and is in addition to the regularly scheduled Period of Performance Summary report.

h) Electronic copies of monthly submitted invoices along with an up-to-date FFP payment schedule.
i) Account for their personnel (i.e. personal or sick leave) to ensure staffing cover. The contractor shall provide the government with 30 days' notice of all employees with scheduled leave greater than 5 business days. The COR and technical point of contact shall be informed of all leave, planned or emergency, as soon as possible and the contractor's work coverage plan to ensure contract performance and timely deliverables.
j) Provide a Staffing Plan and Roster, ten (10) days after contract award and monthly, listing all individuals (including subcontractor staff) by name, labor category, clearance status, team role(s), and aligned PWS tasks for all staff working on this effort including positions onboarding, or transitioning off the contract.
k) Provide the IRS information as it pertains to resources planned, used, and available for current workload activities and to forecast shifts in resources based on IRS priorities. Create a resource tool to be maintained once approved by the government. Any changes to the resource plan shall be approved by IRS. Maintain and use the resource management tool in regular planning meetings to -inform joint decision-making with the IRS related to Contract Contractor staffing and workload planning processes. The tool shall include existing resources and forecasted resources that may be placed in planning packages that may be performed during the contract Period of Performance.

C.3.2.2 Subtask 2.2: Earned Value Management (EVM)

a) Provide Earned Value Management (EVM) data under this contract on Development, Modernization or Enhanced (DME) work on a monthly basis.
b) Provide data collection and reporting about project performance, schedule and cost, as well as activity progress, EVM measures and key metrics on a monthly basis for project control.
c) Provide corrective action reporting, if needed.
d) Compliance with FAR 52.234-4 Earned Value Management System (EVMS) and Treasury policy ANSI/EIA STD – 748A.
e) Provide monthly contractor burn rate status, included in the Monthly Summary Report and the contract status report, complete with contractor burn rate information, organized by task and sub-task, as required seven working days prior to associated invoice submission.

C.3.2.3 Subtask 2.3: Executive Meetings and Reporting

For the purposes of this PWS, executive meetings are where decision-making and policy making occur. Program/operation meetings are where processes and procedures occur, mainly during the normal course of business.

Specifically, the Contractor shall provide the following support services:

DRAFT

a) Assist in the preparation and facilitation of meetings, as needed, with both internal and external stakeholders, including developing meeting and presentation materials, agendas, presentation content, meeting minutes/summaries, notes and action items.
b) Provide monthly and/or weekly status reports, complete with Contractor burn rate information as required seven working days prior to associated invoice submission.
c) Provide a Monthly Status Report (MSR), a monthly Contractor Quality Assessment Report (Attachment 1), and an annual Period of Performance Summary Report for the contract. The Contractor shall work with the COR to determine the needs of such reports and provide reports in accordance with templates provided by IRS.
d) The Contractor shall provide a Monthly Status Report that gives a status update of all work, organized by task and sub task, taking place on this effort. The monthly report should also include Earned Value Management, schedule, staffing levels, and deliverable status as well as an up-to-date accounting of all employee Government Furnished Equipment (GFE), Government Furnished Information (GFI), work locations, and contact information. The MSR shall use metrics to describe the state of the PWS services, organized by task and sub-task, on a monthly basis and will include the financial update with the burn rate by task and sub task, narrative summary of achievements, risks, issues, updated program information, monthly metrics summary, and deliverables for the current monthly period. Any updates to existing deliverables shall be noted in the MSR. The Contractor will conduct/participate in a monthly progress meeting to present the MSR to the Government.
e) Monthly contract status report showing Labor Hour Task titles, CLINs, funding levels, MODs, and estimated and actual burn rates of funding by each Development Value Streams (DVS)'s solutions/products to be included in the MSR.

DESIRED OUTCOME: Contract management support activities are effective and completed on schedule and in accordance with the Business and IT requirements. Consistent reporting, methods and documentation that provides a logical view.

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C.3.3 Task 3: Ramp-up Knowledge Transfer/Transition In

Ramp-Up Knowledge Transfer is defined as the Contractor acquiring and understanding the necessary documentation, information, and processes related to any work in progress.

Transition-In shall be worked concurrently with Ramp-Up Knowledge Transfer. Successful transition can be defined by its capacity to maintain full continuity of operations, high productivity, and exemplary service quality.

The Contractor shall appoint a knowledge transfer manager to oversee the transfer of knowledge and ensure all areas are accounted for. If desired, this can be the Project Manager or Project Scheduler. Prior to the transfer of knowledge, the Contractor shall develop a draft Knowledge Transfer Plan (KTP) and present it to the Government within the first 10 business days after award. The KTP shall identify the Contractor resources and roles involved in the transfer process, provide a list of risks and mitigation strategies for the transfer, and contain a detailed resource balanced project schedule developed with Microsoft Project. The project schedule shall identify tasks, dependencies, deliverables, and milestones. The project schedule shall be at a sufficient level of detail to track progress on a bi-weekly basis (i.e., all tasks will be detailed to a level such that no task has duration of more than ten workdays). The Government shall have five business days to review the draft KTP and provide comments to the Contractor. Government and Contractor representatives will then meet to discuss the comments after which the Contractor shall incorporate the agreed-upon changes and deliver a final KTP within five working days of the government's feedback.

The Contractor shall meet with the IRS weekly to discuss the progress of the knowledge transfer. The Contractor shall show an updated MS Project Schedule and discuss any risks or concerns at this time.

The Contractor shall also develop a Transition-In Checklist 10 business days after award to provide a vehicle to verify completion of the necessary transition-in activities. The Transition-In Checklist shall be signed by both, the Contractor, and the COR after completion of the task.

The Contractor shall perform the following activities during the transition-in period:

a) Assign personnel and submit security papers promptly to get background investigations done quickly and gain access to IRS's network.
b) Request access to tools and documentation.
c) Review and understand all the technical and process documentation.
d) Review and understand the existing data and product security policies in place.
e) Offerors shall provide Ramp-Up Staffing Plan and describe how they will bring resources on board in coordination with the ramp-down efforts of the incumbent.
f) Offerors shall provide Knowledge Transfer Plan/Checklist.

C.3.4 Task 4: Pega Configuration – Development, Maintenance, and Support

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Technical services are required to keep agency services running and ensure consistent collaboration support for customers. The contractor shall provide development teams to fulfill the following:

- Possess a high level of expertise with the Pega software packages to develop/customize business workflows.
- Generate concept of operation for the EFS base system functionality as well as custom workflows based upon business requirements and use-cases including the prioritization of new workflows based upon Business requirements, throughput and retention requirements.
- Document EFS Business Requirements through a high level of IRS process understanding and proven business process re-engineering skills to develop workflows for implementation into EFS.
- Develop and execute all required test plans and work closely with users for testing.
- Use Agile methodologies and SAFe to support iterative development, continuous improvement, and stakeholder collaboration throughout the EFS implementation lifecycle.
- Work closely with the ECM team to field and operate the EFS system on the ECM infrastructure.
- Work closely with the Pega software packages and vendor support teams to configure and operate EFS workflows.
- Develop/maintain FAQs and self-help tools for users on website.
- Capture, maintain and track all outstanding issues and action items.
- Assist with troubleshooting and resolving outstanding issues.
- Develop training and user support guides.
- Support the development and implementation of the PMO's communications plan.
- Develop and implement Return on Investment (ROI) calculations to prioritize potential workflows.
- Coordinate with business and ITS partners to provision users to system
- Rapid delivery of a fully functional, compliant MVP using the Pega platform.
- Generate concept of operation for the MVP functionality as well as custom workflows based upon business requirements and use-cases including the prioritization of new workflows based upon Business requirements, throughput and retention requirements
- Work closely with the Enterprise Pega Platform as a Service (EPPaaS) team to field and operate the EFS system only as it pertains to Pega workflow integration
- Support EFS components through a deep understanding of the EFS components and experience with the Engineering Operations (EOps) team and processes
- Work closely with the Pega software packages and vendor support teams to configure and operation EFS workflows
- Work with the Active Directory team to configure and maintain Single Sign On

DRAFT

- Work on the Security Assessment/Authorization (SA&A) testing & review process
- Ensure cybersecurity requirements are met for the contract, and any software or processes developed must conform to the Section 508 standards.
- Develop and maintain solutions according to no-code/low-code platform layered architecture including support for reusability of platform under Pega Cloud for Government (PCFG)
- Provide, maintain, and upgrade software components necessary for delivery of the required capabilities in accordance with all applicable IRS and Federal policies, guidelines, and directives.
- Provide Application Architecture guidance and adhere to development standards for no-code/low-code platform.
- Provide User Interface/User Experience (UI/UX) templates for the platform/application to ensure consistency with IRS UI/UX standards and template/control reuse.
- Design target-state solution with clear separation of system of engagement (Pega) vs. systems of record, aligned to IRS enterprise architecture.
- Map legacy data to Pega data model, define data ownership, migration, archival, and decommissioning approach.
- Configure secure integrations (uAPI, external/legacy systems), define ICDs, and establish real-time/batch integration patterns.
- Translate business capabilities into Pega case types, workflows, roles, and reusable components, including handling current workarounds.
- Incorporate Pega AI capabilities, including Document AI for automated case summarization, Knowledge Buddy for real-time employee guidance, and AI-powered chatbots for taxpayer interaction, integrating these features into EFS operations to streamline workflows, enhance decision-making, reduce manual effort, and improve both employee efficiency and taxpayer experience.
- Capture and analyze the business, functional and technical requirements.
- Create a Feature List consisting of documented User Stories collected during the business process workshops into a project management tool
- Elicit program requirements and facilitate build-to requirements, document requirements and ensure alignment in appropriate IRS repository.
- Identify technical enablers and service/other integrations required by the application in sufficient timeframes so that supporting teams can provide necessary access to or develop the enablers and/or integrations.
- Assist in making approved additions/changes to any required artifacts.
- Facilitate stakeholder feedback sessions to promote solution/product alignment with stakeholder needs and requirement.

DESIRED OUTCOME – Provide development teams to provide acquisition and engineering support for the development of new workflows, support and enhancement of existing workflows, and day-to-day operations under the guidance of the IRS Program Manager.

DRAFT

C.3.5 Task 5: Testing Support

The IRS requires testing support in various capacities. Test data creation, agile testing and Section 508 compliance testing are critical elements to focus on. These components are key to understanding the importance of this enterprise portfolio, the complexities of processes, and transaction data density involved in this dynamic IRS environment.

Specifically, the Contractor shall provide Information Technology (IT) Applications Development (AD) the following support services:

a) **Testing Management**
   1. Provide end of PI test, to include test scripts for automated testing, regression, performance, and integration testing completion reports.
   2. Provide end-of-iteration test completion reports.
   3. Testing – Perform necessary testing processes and test data in support of producing the common services and COTS development platform configuration.
      i. Integration testing
      ii. System Testing
      iii. Performance testing
      iv. 508 Testing
      v. Regression Testing
      vi. Automated Testing
      vii. Manual Testing

b) **Testing Quality Management**
   1. Track, monitor, manage, and support coordination and resolution of identified development and production defects, including those that result in Change Requests using approved IRS repository.

c) **Section 508 Compliance Management**
   1. Using IRS standards, ensure that Section 508 of the Rehabilitation Act, amended in 1998, and security requirements are embedded in each work product through testing and validation.
   2. Conduct 508 Compliance activities - execute testing methodologies (manual and assistive technology tools) and evaluation of design as it pertains to Section 508 Accessibility and Usability.
   3. Create/Alter testing protocols to align with business requirements and Reusable Enterprise Level requirements (RELRS) and business requirements.
   4. Incorporate appropriate web content accessibility WCAG 2.0 A and AA level Success Criteria and best practice guidelines in testing protocols.
   5. All product testing, including 508 compliance testing and security hardening, is fully completed during each iteration.

DESIRED OUTCOME: The primary goal of measuring the test process for EFS solutions/ products is to help ensure that the solution meets the quality expectations of

DRAFT

the IRS. Quality measures will indicate whether the solutions/products are performing to the defined specifications. Provide coordination of and management of all artifacts that detail 508 work activities, test plans/scripts, test result documentation, epics/user stories used to detail 508 work activities. Satisfactory completion of all tasks for the 508 Testing Support through all phases of the Solutions/Products Evaluation, operations and maintenance, Technical Integration, Test and Deployment stages.

C.3.5.1 Integration Testing/Test Data Creation

The IRS requires testing support in various capacities. Test data creation, performance testing, agile testing and Section 508 compliance training are critical elements to focus on. These components are key to understanding the importance of this enterprise portfolio, the complexities of processes, and transaction data density involved in this dynamic IRS environment.

Specifically, the Contractor shall provide the following support services:

a) **Integration Testing**

1. Develop a comprehensive testing plan that outlines all phases of integration testing, including unit, system, and end to end tests.
2. Configure the testing environment to simulate production conditions accurately, ensuring compatibility with existing systems and software.
3. Execute integration tests cases to verify seamless interaction between modules and other enterprise systems, documenting test results and anomalies.
4. Analyze test outcomes and provide detailed reports, including defect logs, resolution timelines, and impact assessments.
5. Collaborate with stakeholders to validate the system functionality against defined requirements and resolve any integration issues promptly.
6. Integration testing support of applications developed by delivery teams.
7. Manage and coordinate all Integration testing activities on the platforms.
8. Communicate defects and proposed technical workarounds testers may identify.
9. Using IRS standards, ensure that security requirements are reflected in each work product through testing and validation.
10. Create/Alter testing procedures to align with business requirements.
11. Incorporate appropriate Web Content Accessibility Guidelines (WCAG) 2.0 A and AA level Success Criteria and best practice guidelines in testing protocols.
12. All product testing, including Integration testing and security hardening, is fully completed to support each release.
13. Test Plan Document shall contain a detailed description of the testing strategy, objective, scope, timelines, and resources as well as Test Cases and Scripts that include comprehensive list of all test cases and automated scripts, resolution timelines, and statis updates.
14. Data Defect Resolution Reports that logs identified defects, including severity, impact analysis, resolution timelines and status updates.

DRAFT

15. Test Results that detail the testing outcomes, highlighting successful cases, issues resolved, and outstanding defects.
16. Attend program meetings as required

b) **Test Data Creation**

1. Create test data sets and samples for all projects to support testing efforts. Test data sets shall replicate the existing data model of the system / applications include, but are not limited to, the legacy systems and mainframe systems as well as other applications as required by the government.
2. Generate mock test data to cover a minimum of 95% of test scenarios
3. Identify the data set required for testing, including sample documents, metadata, and record representative of operation usage.
4. Create, sanitize, and load test data into the system ensuring compliance with data security and confidentiality policies.
5. Execute integration test cases to verify seamless interaction between application modules and other enterprise systems documenting test results and anomalies.
6. Create test data in IRS Legacy applications that the application integrates with for case augmentation or other interfaces so that this data can be used for integration testing. This includes pulling data using legacy data services or other systemic interfaces.
7. Analyze test results and provide detailed reports, including defect log, resolution timelines, and impact assessment.
8. Collaborate with stakeholders to validate the system's functionality against defined requirements and resolve any integration issues promptly

DESIRED OUTCOME: The primary goal of measuring the test process for EFS solutions/ products is to help ensure that the solution is meeting the quality expectations of the IRS. Quality measures will indicate whether the solutions/products are performing to the defined specifications.

C.3.6 Task 6: Transition Support

The Contractor shall be responsible for the implementation of the transition and application cutover activities. The transition shall cause no disruption in program services or operations. To ensure the necessary continuity of services and to maintain the current level of support, IRS may retain services of the incumbent contractor for some, or all, the transition period, as may be required.

The Contractor shall be responsible for the transition of all technical activities identified in this contract. As part of the transition, the Contractor shall be responsible for:

a) Inventory and orderly transfer of all GFP, to include hardware, software, and licenses; Contractor Acquired Government Property; and GFI.
b) Transfer of documentation is currently in process.
c) Transfer of all software code in process.

DRAFT

d) Certification that all non-public IRS information has been purged from any Contractor-owned system.
e) Participation in knowledge transfer activities in accordance with the transition plan.
f) Providing members to and participate in transition management team.

If the government provides a Transition-Out Plan template, the Contractor shall complete it as assigned; otherwise, the Contractor shall submit a Transition-Out Plan at the direction of the government. The Transition-Out Plan shall:

a) Document the strategic approach.
b) Identify equipment, hardware, software, documents, and other artifacts that are included in the transition.
c) Document milestones and schedules.
d) Document work in progress.
e) Identify transition risks and risk mitigation.
f) Define roles and responsibilities.
g) Define transition approval authorities and lines of communication.

DESIRED OUTCOME: The Contractor provides a Knowledge Transfer Plan that is accepted by the Government and successfully completes knowledge transfer in accordance with the plan. Transition-in Plan/Checklist are accepted and completed as well as the following:

- Successful Ramp-Up Staffing Plan and Knowledge Transfer Plan that is accepted by the Government and successfully completes knowledge transfer in accordance with the plan.
- Transition-In Plan/Checklist is accepted and completed.
- Successful transition of the solution through the lifecycle.
- Ramp-Down Knowledge Transition Plan is accepted, works effectively with the incoming contractor and the Government, and executes the knowledge transfer in accordance with the plan.
- Transition-out Plan/Checklist is accepted and completed.

DESIRED OUTCOME – The contractor shall effectively manage their work and resources to help design, deploy, document, maintain and monitor newly identified technologies and strategies to support IRS initiatives, and regularly report on progress, risks, issues and status.

C.3.7 SKILLS REQUIREMENTS

In addition to meeting the technical requirements set forth in Sections C.1 through C.3.6, the Contractor shall identify the key personnel specified in Section C.3.8. The Contractor and all contractor employees must be tax compliant as of the period of performance start date.

DRAFT

The Contractor shall provide the following certification:

- Program COTS development platform certifications (currently Pega, and any IRS COTS development platform selected thereafter)
    - Pega Certified Lead System Architect (PCLSA)
    - Pega Certified Senior System Architect (PCSSA)
    - Pega Certified Lead Business Architect (PCLBA)
- The Contractor shall provide expertise on the following system at a minimum, hardware, and software, Java, Pega Infiniti, Pega Collections, Pega Customer Service, Confluence, Jira, Zoom Text (508), JAWS (508), Dragon (508), Ping Federated, Objected Oriented Programming Concepts and Patterns, XML, Docker, Kubernetes, Linux, Insight Manager, S3, PostgreSQL, PCFG, Playwright, Informatica, Pega Diagnostic center (PDC), AWS DMS (Data Migration Service), AWS SCT (Scheme Conversion Tool), AWS CLI (Command Line Interface), Informatica S3 Connector, GitHub, Pega console and other systems if required.

Specialized experience shall also include expertise in these areas: COTS development platform-based Portfolio's solutions/products orchestrations and choreographies, conduct and prepare effective presentations and briefings for various management levels, technical analysis of Portfolio, Solution, and Product Management processes to enable DVSs. Proven ability to analyze broadly scoped task to synthetize the plausible Portfolio's solutions/products.

Core Technical Expertise

- Microsoft ecosystem: Office 365, SharePoint (design & management), Teams, Project, Project Server
- Enterprise platforms: Pega Cloud for Government, Biscom, IR Works, One SDLC, AudioCodes, EFS, OpenText Documentum
- Database & integration: SQL, REST API development, EFT (file transfer protocols)
- Cloud & on-prem infrastructure: deployment, interaction, and support
- Network infrastructure: SIP, backbone components, monitoring and management tools
- Cybersecurity & compliance: FISMA (SP 800-53/53A), NIST (SP 800 series, CMMC, FIPS), ITIL, CMMI, PMI, ISO 9000

Program & Project Management

- Program and project leadership aligned with One SDLC and PMBOK standards
- PgMP and PMP-certified management professionals, as identified in Key Personnel requirements
- Enterprise program management tools and documentation (ProSight, E-300, CPIC, ELC alignment)
- Cost estimating, budgeting, and federal funding cycle experience
- Risk and change management integration
- Performance measurement and operational metrics development

Specialized IRS and Federal Experience

- Deep understanding of IRS programs, initiatives, processes, and

DRAFT

enterprise systems (ECM, PCFG, ZPI)
- Experience with IRS common services: Active Directory, Exchange, BEARS, ESM, PSTN, Documentum
- Continuity of operations with current IRS security clearances and access
- Familiarity with E-300 Health Assessments, Summary of Spending Tables, and program tracking

Additional Technical & Operational Skills
- Workflow and data migration development
- ECM/PMO team and infrastructure management
- Experience supporting OpenText Documentum/xCP and EPPaaS environments
- Enterprise Electronic Fax operations and maintenance

DESIRED OUTCOME –The contractor shall provide personnel with the above qualifications and skills. The contractor shall provide personnel who will be able to obtain and retain IRS clearances at the moderate or above level with access to key EFS environments, to provide immediate support to these ongoing dynamic programs.

C.3.8 Key Personnel/Resources
For this contract, key personnel shall be assigned for a minimum period of 12 months, barring circumstances outside the control of the Contractor, e.g., death and disability. All key personnel positions shall be dedicated 100 percent to this contract and be available to begin work immediately on the anticipated contract start date.

Note: If key personnel are not an employee of the vendor, please attach a signed key personnel commitment letter with the proposal and below required certifications. If any key personnel leave the position, the contractor is required to fill the position with an employee who meets the requirements. The resume of the new employee must be provided to the CO and COR for approval to ensure requirements are met.

The following positions are hereby designated as key personnel for this contract:

#	Resources	Responsibilities	Shall have
1	**Lead – Software Architect, Pega Applications**: Serve as an expert consultant to oversee and guide IT strategies, focusing on designing and implementing	• Provide technical leadership as a Pega Lead System Architect (LSA), ensuring seamless integration with existing infrastructure • Define IT	• 15+ years of experience in IT leadership, architecture, specializing in Pega • Certified as a Pega Lead System Architect (LSA – both part 1 and

DRAFT

	architecture, workflows, and enterprise focused solutions, particularly utilizing Lead – Software Architect, Pega Applications is responsible for coordinating the management of all work and shall act as the central point of contact (POC) for this project. Analyze new and complex project-related problems and create innovative solutions that normally involve the schedule, technology, methodology, tools, solution components, and financial management of the project. Provide application systems analysis and Transition and Target State plans for application selection, systems development, systems maintenance, and production	strategies and manage infrastructure to meet organizational objectives • Lead teams in system design, deployment, and performance optimization. • Ensure compliance with regulatory standards and information security protocols • Provide guidance on best practices, coding standards, and development framework. • Conduct code reviews and ensure adherence to best practices • Evaluate emerging technologies for potential integration • Collaborate with leadership to align IT strategies with business goals. • Coordinate with Pega vendor with Service Requests and their resolution	part 2 certifications) is required. Attach both certifications • Strong knowledge of IT systems, networking, and security standards • Proven experience managing cross-functional teams. • Strong interpersonal skills to work in dynamic, project-based roles. • A Bachelor of Science (BS) in computer science (CS) field is required.

DRAFT

	activities for necessary support resources.	• Manage Pega platform level 508 defects and their plan for their resolution • Advocate for reusable design patterns and components that can be leveraged across applications	

Key personnel are defined as personnel: (i) identified in the quote as key individual(s) to be assigned for participation in the performance of the contract; (ii) whose resumes were submitted with the quote; or (iii) which are designated as key personnel by agreement of the Government and the Contractor during negotiations.

C.3.9 LABOR HOUR ESTIMATE

The below table is the estimated level of effort anticipated by the Government for a Contractor to complete PWS work as described at Section C.3.

A combination of resources shall be used across each team which will result in some FTE's that are full-time, and others may be ad-hoc or part-time.

Labor Category Position or Role	**Estimated Total Hours Per Year**
Program Manager	1440
Senior Application Analyst	6410
Senior Software Developer	960
Test Analyst	960
Quality Assurance Analyst	960
508 Tester	960
Technical Writer/User Researcher/Web Designer /Process Engineer	960
Senior Systems Architect	3800
Lead System Architect	4560
IT Administrative Specialist	766
Total Hours:	**21776**

DRAFT

C.3.10 PERIOD OF PERFORMANCE

The period of performance (POP) for this contract shall be one (1) year from date of award with two 12-month option periods

C.3.11 PERFORMANCE REQUIREMENTS, STANDARDS AND SURVEILLANCE

The Government believes there is value in incorporating Performance-Based Service Acquisition (PBSA) methodology with an outcomes-based focus for this work. In accomplishing this work, the Contractor shall establish a Quality Assurance Program (QAP) to attain, sustain and advance exceptional delivery of operations and maintenance services. The Contractor's QAP will include its description of people, tools and processes that it will use to ensure compliance with all contract requirements and its proposed methods for providing continuous improvement in service delivery.

The Contractor's QAP shall link the Government and Contractor's quality assurance efforts into an integrated package with shared objectives. Accordingly, the Contractor's QAP shall demonstrate an in-depth understanding of the IRS's quality performance requirements, provide a clear statement of how the Contractor's quality program will advance the IRS toward its objectives (stated in Section C.2), and provide a detailed set of Plans (for example Quality Assurance Surveillance Plan, Configuration Management and Change Control Plan, Asset Management Plan, Risk Management Plan and other plans at the Contractor's discretion), that the Contractor will use to manage execution of the PWS.

C.4 Section 508 Accessibility Requirements

Section 508 Services

For Development or Customization: All contracts, solicitations, purchase orders, delivery orders and interagency agreements that contain a requirement of services which will result in the delivery of a new or updated information and communication technology (ICT) item/product must conform to the applicable provisions of the appropriate technical standards in 36 CFR, Appendix C to Part 1194, and functional performance criteria in 36 CFR Chapter 3, unless an agency exception to this requirement exists at E202 General Exceptions.

Section 508 Conformance

When Less than Fully Conforming: Each information and communication technology (ICT) product and/or product related service delivered under the terms of this contract, at a minimum, shall conform to the applicable accessibility standards at 36 CFR, Appendix C to Part 1194 at the level of conformance as specified in the Attachment entitled (Please state where attachment may be found and name of attachment for example, Section J., Voluntary Product Accessibility Template (VPAT) or Section J., Evaluation Matrix).

DRAFT

Section 508 Accessibility of Information and Communication Technology (100% Compliance)

When Fully Conforming: Each information and communication technology (ICT) product or service furnished under this contract shall comply with the Information and Communication Technology Accessibility Standards (36 CFR, Appendix C to Part 1194). If the Contracting Officer determines any furnished products or services are not in compliance with the contract, the Contracting Officer will apply the remedies described under FAR 52.246-2, Inspection of Supplies – Fixed Price or FAR 52.246-4, Inspection of Services – Fixed Price.

The following technical standards have been determined to be applicable to this contract (Reference - ICT Accessibility 508 Standards):

Chapter 5: Software
502 Interoperability with Assistive Technology

- 502.1 General
- 502.2 Documented Accessibility Features
- 502.2.1 User Control of Accessibility Features
- 502.2.2 No Disruption of Accessibility Features

502.3 Accessibility Services

- 502.3.1 Object Information
- 502.3.2 Modification of Object Information
- 502.3.3 Row, Column, and Headers
- 502.3.4 Values
- 502.3.5 Modification of Values
- 502.3.6 Label Relationships
- 502.3.7 Hierarchical Relationships
- 502.3.8 Text
- 502.3.9 Modification of Text
- 502.3.10 List of Actions
- 502.3.11 Actions on Objects
- 502.3.12 Focus Cursor
- 502.3.13 Modification of Focus Cursor
- 502.3.14 Event Notification
- 502.4 Platform Accessibility Features

503 Applications

- 503.1 General
- 503.2 User Preferences
- 503.3 Alternative User Interfaces
- 503.4 User Controls for Captions and Audio Description
- 503.4.1 Caption Controls
- 503.4.2 Audio Description Controls

DRAFT

504 Authoring Tools

- 504.1 General
- 504.2 Content Creation or Editing
- 504.2.1 Preservation of Information Provided for Accessibility in Format Conversion
- 504.2.2 PDF Export
- 504.3 Prompts
- 504.4 Templates

Chapter 7: Referenced Standards
702.10.1 WCAG 2.0

- 1.1.1 Non-text Content
- 1.2.1 Audio-only and Video-only (Pre-recorded)
- 1.2.2 Captions (Pre-recorded)
- 1.2.3 Audio Description or Media Alternative (Pre-recorded)
- 1.2.4 Captions (Live)
- 1.2.5 Audio Description (Pre-recorded)
- 1.3.1 Info and Relationships
- 1.3.2 Meaningful Sequence
- 1.3.3 Sensory Characteristics
- 1.4.1 Use of Color
- 1.4.2 Audio Control
- 1.4.3 Contrast (Minimum)
- 1.4.4 Resize Text
- 1.4.5 Images of Text
- 2.1.1 Keyboard
- 2.1.2 No Keyboard Trap
- 2.2.1 Timing Adjustable
- 2.2.2 Pause, Stop, Hide
- 2.3.1 Three Flashes or Below
- 2.4.1 Bypass Blocks
- 2.4.2 Page Titled
- 2.4.3 Focus Order
- 2.4.4 Link Purpose (in Context)
- 2.4.5 Multiple Ways
- 2.4.6 Headings and Labels
- 2.4.7 Focus Visible
- 3.1.1 Language of Page
- 3.1.2 Language of Parts
- 3.2.1 On Focus
- 3.2.2 On Input
- 3.2.3 Consistent Navigation
- 3.2.4 Consistent Identification
- 3.3.1 Error Identification
- 3.3.2 Labels or Instructions
- 3.3.3 Error Suggestion
- 3.3.4 Error Prevention (Legal, Financial, Data)
- 4.1.1 Parsing
- 4.1.2 Name, Role, Value

DRAFT

The standards do not require the installation of specific accessibility-related software or the attachment of an assistive technology device, but merely require that the ICT be compatible with such software and devices so that it can be made accessible if so required by the agency in the future.

Chapter 3: Functional Performance Criteria

The following functional performance criteria (36 CFR Chapter 3) apply to this contract.

- 302.1 Without Vision
- 302.2 With Limited Vision
- 302.3 Without Perception of Color
- 302.4 Without Hearing
- 302.5 Without Limited Hearing
- 302.6 Without Speech
- 302.7 With Limited Manipulation
- 302.8 With Limited Reach and Strength
- 302.9 With Limited Language, Cognitive, and Learning Abilities

Section 508 Information, Documentation and Support

In accordance with 36 CFR, Appendix C to Part 1194, the information and communication technology (ICT) products and product support services documentation furnished in performance of this contract shall be provided at no additional cost. The contractor shall provide information, documentation, and support relative to the supplies and services as described in the statement of work, performance work statement or statement of objectives (select one). The following technical standards and provisions have been determined to be applicable to this contract:

Chapter 6: Support Documentation and Services
Support Documentation

- 602.2 Accessibility and Compatibility Features
- 602.3 Electronic Support Documentation
- 602.4 Alternate Formats for Non-Electronic Support Documentation

Support Services

- 603.2 Information on Accessibility and Compatibility Features
- 603.3 Accommodation of Communication Needs

C.5 PERFORMANCE REQUIREMENTS

Performance requirements are described in terms of successfully completing the specified tasks including all deliverables, work products, and support identified in Section C.3. The Contractor's

DRAFT

QAP shall align the Contractor's objectives with the Government objectives, which are to successfully complete the tasks and deliver value-added products and services to the end users.

C.5.1 PERFORMANCE STANDARDS

Performance Standards have been identified in Performance Standard document for each of the tasks. All deliverables shall follow current templates and guidelines for ELC, Exhibit 300, and IRS 508 standards. This represents the Government's initial minimum performance standards.

This PWS describes the desired outcomes, performance requirements, standards, and surveillance methods for this contract. The Table below is divided into tasks (as applicable): It is intended to align Contractor's goals and objectives with the IRS program goals and objectives as follows:

1. The Table below reflects the guidance and methods for determining metrics, and Acceptable Quality Levels.
2. The elements of Documentation Quality, as used herein, are defined below.
3. The Contractor shall provide all information in accordance with the required IRS standards and guidelines as stated in Section C of this PWS contract.

All deliverables, documents, and services shall satisfy program requirements, and comply with IRS CMMI standards, existing IRS standards and guidelines, and integrate with IRS, security requirements, and Section 508.

- Completeness – The document demonstrates sufficient level of detail to show understanding of the requirements, technology and design, customers and operating environment.
- Feasibility - The document defines information, which is formatted properly, contains valid information in support of this contract and provides a deliverable within time constraints.
- Understandability - The document is to be clean, clearly written, all printed words are legible, and the outline is easy to follow. All diagrams are easy to understand and relevant to the supporting narrative.
- Accuracy – The document is accurate in presentation exhibiting clear and concise information, technical content, and adherence to accepted elements of style, operational content, and consistent within itself and with other documents.
- Practicality - The document provides information and guidance that is practical for implementation within the IRS environment and appropriate given the subject organization's level of maturity.

All deliverables considered "Unacceptable" and not in accordance with the elements of Documentation Quality as stated below will be returned to the contractor for rework, correction, and updates. The Contractor shall re-submit the deliverables to the Government within (5) five business days at No Additional Charge to the Government.

DRAFT

Performance Evaluation Scoring Range					
RATINGS					
	Unsatisfactory	**Marginal**	**Satisfactory**	**Very Good**	**Exceptional**
TASKS					
Task 1 (C.3.1) **Task 2 (C.3.2)** **Task 3 (C.3.3)** **Task 4** **(C.3.4)** **Task 5** **(C.3.5)** **Task 6** **(C.3.6)**	The Contractor's performance fails to meet requirements by a substantial margin. There are very few areas of good performance, and these are more than offset by lower rated performance in other areas.	The Contractor's performance fails to meet all requirements. There are areas of good performance, but these are more than offset by lower rated performance in other areas.	The Contractor's performance meets all requirements.	The Contractor's performance exceeds requirements. There may be areas for improvement, but these areas are more than offset by better performance in other areas.	The Contractor's performance exceeds requirements by a substantial margin providing additional value to the Government. There are virtually no areas for improvement.

DRAFT

C.5.1 SURVEILLANCE

The surveillance process has two interrelated parts: the Deliverable Schedule and the Quality Assurance Surveillance Plan (QASP) included as Performance Standard document. The Contractor shall establish and maintain a complete Quality Control Plan (QCP) in accordance with Section 7 of the QASP (Performance Standard document). This links the Government and Contractor's quality assurance efforts into an integrated package with shared objectives.

C.6 GOVERNMENT-FURNISHED PROPERTY (GFP)

GFP *(to include material, equipment, and/or information)* may be provided in the performance of this contract. The following GFP will be provided to the contractor:

ITEMS	QUANTITY
Contractor Identification Badge	TBD
Contractor Building Access/Proximity Card	TBD
Laptop Computer with IRS Common Operating Environment including Local Area Network Access and Internet/Intranet	TBD
Office Space (Desk, Chair, Standard Office Equipment)	TBD
IRS Standard Software	TBD
Microsoft Office: Word, Excel, PowerPoint, Project, Access, OneNote	TBD
Telephone With VMS	TBD

At the end of this contract, disposition of GFP shall be in accordance with FAR 52.245.1.

C.7 GOVERNMENT-FURNISHED INFORMATION

GFI *(to include manuals, notes, memos, instruction materials and other information)* may be provided in the performance of this contract. The following GFI will be provided to the contractor upon contract award.

INFORMATION ITEMS
ELC documentation for all programs
All project charters, process and procedure descriptions
SharePoint Access

At the end of this contract, disposition of GFI shall be in accordance with FAR 52.245.5.

C.8 TRAVEL

Travel cost will not be reimbursable in the performance of this work.

C.9 REPORTS

The contractor shall pull and provide reports as outline in Section C.3 and C.4.

C.10 PLACE OF PERFORMANCE

The Contractor personnel will be performing work at IRS New Carrollton Federal Building (NCFB) located at 5000 Ellin Rd. Lanham, MD 20706.

Performance will not be required beyond the standard workday. The standard workday is defined as any eight hours of productive labor during the core business hours of 7:00 a.m. through 5:00 p.m. Eastern Standard Time (EST), Monday through Friday.

DRAFT

C.5 DELIVERABLES

C.5.1 Program Deliverables

Deliverable Number	Deliverable	Deliverable Summary	Timeframe
01	Monthly Status Report	Provide a monthly status report in Microsoft Word or Power Point format with status for the overall program and each individual workflow.	Monthly
02	Monthly Staffing Report	Provide the workforce report using the template at Attachment 4 with each invoice submitted.	Monthly
03	Monthly Prime Contractor Certification	Provide Monthly Prime Contractor Certification with each monthly workforce report.	Monthly
04	PM Ad Hoc Reports	Provide ad hoc reports as requested by the COR or Agency Program Team.	As Required
05	Communications Plan	Develop an Agency-approved Communications Plan for EFS.	Within 3 months of project start date
06	Development Organization Chart	Provide an organization chart for the EFS Development Team.	Within 1 month of project start date
07	Test Plans	Develop a Test Plan for each new workflow release.	Before the testing of each new workflow release
08	Training and User Support Guides	Develop Training and User Support Guides as required.	As Required
09	FAQs and Self-Help Tools	Provide an FAQ and Self-Help page within SharePoint for business users.	As Required
10	MVP for each new workflow	Provide a Minimally Viable Product (MVP) for each of the new workflows developed.	Within 20 weeks of workflow kick-off
11	Program Binders with all required ELC documentation as required, including an electronic version in MS OneNote		As Required
12	Program status reports and presentations		As Required
13	Process flows and guidelines Technical solution document and ingestion processes		As Required
14	Reports and documentation relating to ad hoc tasks		As Required
15	Program SharePoint sites and documentation libraries		As Required
16	Bi-Monthly Program Status Report		Bi-Monthly (15th and last day of the month)

DRAFT

17	New Performance Measures Matrix and tracking	As Required
18	ProSight	As Required
19	Documented costs and variances of spending vs budget	As Required
20	Schedule for Responding to Material Weaknesses (MW) or TIGTA Reviews	As Required
21	Transition Baseline Inventory and Validation Process	As Required

C.5.2 Software Deliverables

Deliverable	Performance Standard(s)	Acceptable Quality Level	Method of Assessment
Code	**Tested** Code delivered under the order must have substantial test code coverage and a clean code base Version-controlled, public repository of code comprising the product, which shall remain in the government domain	Minimum of 90% test coverage of all code	Combination of manual review and automated testing
	Properly Styled GSA 18F Front-End Guide	0 linting errors and 0 warnings	Combination of manual review and automated testing
	Deployed Code must successfully build and deploy into staging environment	Successfully build with a single command	Combination of manual review and automated testing
	Documented All dependencies are listed, and the licenses are documented. Major functionality in the software/source code is documented. Individual methods are documented inline using comments that permit the use of documentation-generation tools such as JSDoc. A system diagram is provided	Combination of manual review and automated testing, if available	Manual review
	Security Adherence Open Worldwide Application Security Project (OWASP) Application Security Verification Standard 4.0, Level 2	Code submitted must be free of medium- and high-level static and dynamic security vulnerabilities	Clean tests from a static testing SaaS (such as npm audit) and from OWASP Zed Attack Proxy (ZAP), along with documentation explaining any false positives

Deliverable	Performance Standard(s)	Acceptable Quality Level	Method of Assessment
User research	Usability testing and other user research methods must be conducted at regular intervals throughout the development process (not just at the beginning or end)	Artifacts from usability testing and/or other research methods with end users are available at the end of every applicable sprint, in accordance with the vendor's research plan	Manual review

C.6 KICK OFF MEETING

Within five (5) business days of award, the Contractor shall meet with Government representatives in person or via teleconference. The Contractor shall work with the Contracting Officer's Representative (COR) to schedule the meeting with the appropriate personnel. The kickoff meeting shall include any associated personnel that will work on these tasks.

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