Bidder must indicate agreement to each of the deliverables listed in the table below as described in SOW Section 5, PROJECT TASKS/DELIVERABLES. By indicating “Yes,” the Bidder affirms that it understands the requirement and agrees to comply with the requirement. Answering “No” to any of the mandatory deliverables in the Final Proposal will result in the proposal being deemed non-responsive.

Deliverable ID	Deliverable Name	Submittal Due Date	Bidder Agrees to Produce (Y/N)
DEL-01	Application User Guide	Initial: 30 calendar days prior to Task Group #4 start date in State-approved Project Schedule Updates: 30 calendar days following any configuration changes	
DEL-02	Configuration Management Plan	Initial: 30 calendar days prior to Task Group #3 start date in State-approved Project Schedule Updates: Annually or as needed to keep the plan current with existing processes	
DEL-03	Defect Management Plan	Initial: 60 calendar days prior to System Testing start date in State-approved Project Schedule Updates: Annually or as needed to keep the plan current with existing processes	
DEL-04	Detailed Design Specification	Initial: 30 calendar days prior to Test Group #3 start date in State-approved Project Schedule Updates: 30 calendar days following any configuration changes	
DEL-05	Go-Live Readiness Checklist	Initial: 60 calendar days prior to Task Group #7 start date in State-approved Project Schedule Updates: As requested by the State	
DEL-06	Implementation Completion Report	Initial: 30 calendar days after Task Group #7 completion date in State-approved Project Schedule Updates: As requested by the State	

Deliverable ID	Deliverable Name	Submittal Due Date	Bidder Agrees to Produce (Y/N)
DEL-07	Implementation Management Plan	Initial: 30 calendar days after Contract execution Updates: Annually or as needed to keep the plan current with existing processes	
DEL-08	Incident Management Plan	Initial: 30 calendar days prior to Task Group #4 start date in State-approved Project Schedule Updates: Annually or as needed to keep the plan current with existing processes	
DEL-09	Interface and Integration Specifications Document	Initial: 30 calendar days prior to Task Group #4 start date in State-approved Project Schedule Updates: 30 calendar days following any configuration changes	
DEL-10	Maintenance and Operations (M&O) Plan	Initial: 30 calendar days prior to Task Group #8 start date in State-approved Project Schedule Updates: Annually or as needed to keep the plan current with existing processes	
DEL-11	Monthly Status Report (MSR)	Initial: 10th business day of the following month after Contract execution Updates: 10th business day of each month	
DEL-12	Pilot Completion Report	Initial: 30 days prior to Task Group #7 start date in State-approved Project Schedule Updates: As requested by the State	
DEL-13	Release Management Plan	Initial: 30 calendar days prior to Task Group #3 start date in State-approved Project Schedule Updates: Annually or as needed to keep the plan current with existing processes	

Deliverable ID	Deliverable Name	Submittal Due Date	Bidder Agrees to Produce (Y/N)
DEL-14	Requirements Traceability Matrix (RTM)	Initial: 30 calendar days prior to Task Group #3 start date in State-approved Project Schedule Updates: 10 calendar days prior to completion of each subsequent Task Group	
DEL-15	System Architecture and Infrastructure Specifications	Initial: 30 calendar days prior to Task Group #4 start date in State-approved Project Schedule Updates: Annually or as needed to keep the plan current with existing processes	
DEL-16	System Operations and Administration Manual	Initial: 30 calendar days prior to Task Group #5 completion date in State-approved Project Schedule Updates: 30 calendar days following any configuration changes	
DEL-17	System Security Plan	Initial: 30 calendar days prior to Task Group #4 start date in State-approved Project Schedule Updates: Annually or as needed to keep the plan current with existing processes	
DEL-18	System Test Plan	Initial: 30 calendar days prior to Task Group #2 start date in State-approved Project Schedule Updates: Annually or as needed to keep the plan current with existing processes	
DEL-19	Test Results Completion Report	Initial: 5 calendar days after each test phase is complete and 15 calendar days prior to UAT start date in State-approved Project Schedule Updates: As frequently as needed to report on testing activities	
DEL-20	Test Support Materials and Artifacts	Initial: 15 calendar days prior to UAT start date in State-approved Project Schedule Updates: Annually or as needed align with testing activities	

Deliverable ID	Deliverable Name	Submittal Due Date	Bidder Agrees to Produce (Y/N)
DEL-21	Training Materials	Initial: 5 calendar days after Task Group #5 start date in State-approved Project Schedule Updates: Annually or as needed align with training activities	
DEL-22	Training Plan	Initial: 30 calendar days prior to Task Group #1 completion date in State-approved Project Schedule Updates: Annually or as needed to keep the plan current with existing processes	
DEL-23	Transition and Close Out Plan	Initial: 12 months prior to Contract term end date Updates: As requested by the State	

DEL-01: Application User Guide	
ID	DEL-01
Name	Application User Guide
Description	The Application User Guide is designed to help end-users understand, navigate, and effectively use a software application. It serves as a reference manual that enables users to accomplish tasks independently.
Required Content	The Application User Guide shall include: • Roles and Responsibilities • Assumptions and Constraints • An overview and comprehensive walkthrough of the configured System • Step by step instructions for capturing key functionality and features of the application • Descriptions of the application features, functionality, and navigation • Descriptions of menus, screens, drop-down values, selection fields, forms, mandatory data elements, business rules, and data validations using language that can be understood by a general audience • Descriptions of configurable variables, their functionality, and definitions • Sample images and examples of screens, forms, and reports

DEL-01: Application User Guide	
	• Page and flow diagrams using language that can be understood by a general audience • Narrative and graphical descriptions of key features using language that can be understood by a general audience • Descriptions of workflows and expected outcomes/actions in the flow • User permissions, privileges, access, and other controls • Privacy and security limitations and instructions • Description of error messages and online help features • Troubleshooting guide using language that can be understood by a general audience • Reports catalog • Description for each report • Description of reporting tools • Instructions and procedures for accessing, running, creating, and exporting a report • Glossary and acronym descriptions

DEL-02: Configuration Management Plan	
ID	DEL-02
Name	Configuration Management Plan
Description	The Configuration Management Plan defines how configuration items (hardware, software, documentation, and other project components) will be identified, controlled, tracked, and audited throughout the Project's lifecycle. It ensures consistency, traceability, and control over Project Deliverables and changes.
Required Content	The Configuration Management Plan shall include: • Executive Summary • Roles and Responsibilities • Assumptions and Constraints • Purpose, Scope, Objectives • Configuration management framework and approach for managing and tracking configuration changes in all environments, dependency mapping to show how configuration items are controlled, baseline establishment (i.e., Contractor's base Solution), configuration change processes, and release management. • Naming conventions and labeling schemes • Version control processes and procedures, guidelines, and expectations. • Description of tools and Infrastructure that could be utilized to support configuration management. • Integration and process flow with defect management. • Approach to verifying/validating the configurations after deployment to each system environment • Configuration related training and documentation • Dependency Map to show how configuration items are controlled • Configuration Management Quality Assurance • Audit types, schedules, procedures, and outputs

DEL-03: Defect Management Plan	
ID	DEL-03
Name	Defect Management Plan
Description	The Defect Management Plan establishes the processes, procedures, and standards for identifying, documenting, tracking, prioritizing, and resolving defects throughout the software development lifecycle. It ensures systematic handling of issues to maintain product quality and timelines.

Required Content	The Defect Management Plan shall include:
	• Executive Summary
	• Roles and Responsibilities
	• Assumptions and Constraints
	• Purpose, Scope, Objectives
	• Defect management methodology, processes, and procedures, including the following:
	  ○ Defect identification and reporting
	  ○ Defect categories (e.g., functional defects, performance issues, security vulnerabilities, usability issues, documentation errors, configuration issues, etc.)
	  ○ Defect severity classification definitions and response times
	  ○ Defect prioritization and triage
	  ○ Defect status definitions
	  ○ Reporting organization and person (“Opened by”) and history/audit trail
	  ○ Resolution owner
	  ○ Impacted documentation (e.g., test cases, System Documentation, Training Materials)
	  ○ Documentation update owner
	  ○ Resolution tester
	  ○ Resolution approver
	  ○ Software release to include resolution
	  ○ Defect resolution status (e.g., cannot reproduce, working as designed, deferred to upcoming Release #, duplicate (indicate cross reference number), need more information)
	  ○ Defect prevention, including root causes analysis, process improvements, lessons learned documentation, preventative action planning
	• Defect tracking documentation and training guides

DEL-03: Defect Management Plan	
	• Defect tracking tool and metrics • Defect management reporting • Integration with release management processes • Release management communications, including Test and training team coordination and communications

DEL-04: Detailed Design Specification	
ID	DEL-04
Name	Detailed Design Specification
Description	The Detailed Design Specification describes the internal design of the Solution at a granular level. It bridges the gap between high-level architecture and actual implementation, providing developers with specific instructions on how to build system components.
Required Content	The Detailed Design Specification shall include: • Assumptions and constraints • Detailed Design Specification Scope • Solution Overview, including comprehensive description of the business and technical functionality • Design Goals and Principles • Detailed Architecture • Module/Component Design and Structure, including identification of configurable aspects of the Solution • Data Design, including diagrams/schema, table definitions, field specifications, indexes, constraints, data dictionary, data flow • Interface Design, including User Interface and System Interfaces • Process and Design Logic, including detailed algorithms, business rules implementation, calculation formulas, decision tress and flowcharts, validation rules, workflow definitions and diagrams • Security Design, including user authentication and authorization, data security, security controls • Error handling and exception management • Performance Design • Scalability and Availability • Data Transformation Logic and Rollback Procedures • Batch Processing and Scheduling, including batch job specifications, scheduling requirements, job dependencies, error handling in batch processes, restart and recovery logic, monitoring and alerting • Reporting and Analytics • Logging and Monitoring • Reports catalog, including description and purpose

DEL-05: Go-Live Readiness Checklist	
ID	DEL-05
Name	Go-Live Readiness Checklist
Description	The Go-Live Readiness Checklist ensures all necessary activities, tasks, and criteria have been completed and validated before deployment of the Solution and is used as input to the Go/No Go Decision. It serves as a stage gate to verify organizational readiness and minimize risks during Solution Go-Live, Rollout, and Support.
Required Content	The Go-Live Readiness Checklist shall include: • Executive Summary with Status • Requirements and Testing Validation • Pilot Results and Validation • Defect Status and Validation • Solution Environments Validation • Security Compliance Validation • Backup and Disaster Recovery Validation • Performance Validation • Monitoring and Logging Validation • Operational Readiness Validation • Communication and Change Management • Cutover Plan and Activities • Rollback Plan and Criteria • Business Continuity Plan • Go-Live Plan with Roles and Responsibilities • Post-Go-Live Support • Go/No Go Decision Criteria and Status • Sign-off and Approvals

DEL-06: Implementation Completion Report	
ID	DEL-06
Name	Implementation Completion Report
Description	The Implementation Completion Report provides a comprehensive summary of the completed Solution Go-Live, Rollout, and Support. It documents what was delivered, how it was accomplished, and lessons learned.

DEL-06: Implementation Completion Report	
Required Content	The Implementation Completion Report shall include: • Executive Summary • Project Overview • Scope and Deliverables • Requirements Fulfillment • Implementation Activities Approach and Summary • Testing Approach and Summary • Defect Management Approach and Summary, including list of all Severity 1 and Severity 2 defects with resolution status • Pilot Approach and Summary • Go-Live Approach and Summary • Training Approach and Summary • Infrastructure Deployed • Security and Compliance Approach and Summary • Performance Baselines and Metrics • Integrations and Interfaces Approach and Summary • Support and Operations Transition • Budget and Financial Performance • System Stabilization (Post-Go-Live) Activities • Outstanding Items and Future Enhancements • Maintenance and Operations Readiness • Lessons Learned • Compliance and Audit Trail • Success Criteria Assessment, including key metrics and outcomes • Recommendations and Next Steps

DEL-07: Implementation Management Plan	
ID	DEL-07

DEL-07: Implementation Management Plan	
Name	Implementation Management Plan
Description	The Implementation Plan defines the strategy, approach, processes, and procedures for deploying the Solution into Production. It serves as the master plan that guides all implementation activities from preparation through Go-Live and System Stabilization.
Required Content	The Implementation Management Plan shall include: • Executive Summary • Roles and Responsibilities • Assumptions and Constraints • Purpose, Scope, Objectives • Implementation Strategy • Implementation Timeline and Phases • Requirements Approach and Management, including the Requirements Traceability Matrix • System Development and Configuration Approach and Management, to be further detailed in Configuration Management Plan • Testing Approach and Management, to be further detailed in System Test Plan • Infrastructure and Technical Preparation • Release Approach and Management, to be further detailed in the Release Management Plan • Defect Resolution Approach and Management, to be further detailed in the Defect Management Plan • Security and Compliance Approach and Management, to be further detailed in the System Security Plan • Integration Management • Training and Knowledge Transfer Approach and Management, to be further detailed in the Training Plan • Pilot Approach and Management • Cutover and Go-Live Approach and Management • Rollback Approach and Management • System Stabilization Approach and Management • Monitoring and Reporting Approach and Management • Disaster Recovery Approach and Management • Performance Approach and Management, to be further detailed in the Performance and Capacity Management Plan • Success Criteria and Metrics

DEL-07: Implementation Management Plan	
	• Maintenance and Operation (M&O) Approach and Management, to be further detailed in the M&O Plan

DEL-08: Incident Management Plan	
ID	DEL-08
Name	Incident Management Plan
Description	The Incident Management Plan defines the processes, procedures, and responsibilities for identifying, responding to, resolving, and learning from incidents that disrupt or could disrupt Solution operations. It ensures systematic handling of incidents to minimize business impact and restore services quickly.

Required Content	The Incident Management Plan shall include:
	• Executive Summary
	• Roles and Responsibilities
	• Assumptions and Constraints
	• Purpose, Scope, Objectives
	• Definitions and Terminology
	• Incident Categories, Classification, and Prioritization, aligned to SOW Attachment 3, Service Level Agreements
	• Incident Lifecycle, including status steps and workflow, including:
	    o Incident Detection and Logging
	    o Incident Diagnosis and Investigation
	    o Incident Resolution and Recovery
	    o Escalation Procedures
	    o Major Incident Management
	    o Incident Communications and Notifications
	    o Incident Closure
	• Incident Management Tool(s)
	• Monitoring and Metrics
	• Alignment with related deliverables, including the Configuration Management Plan, System Test Plan, and Release Management Plan.

DEL-09: Interface and Integration Specifications Document	
ID	DEL-09
Name	Interface and Integration Specifications Document
Description	The Interface and Integration Specifications Document defines how different solution components or modules communicate and exchange data with each other. It provides detailed specifications for all integration points, data flows, protocols, and interfaces required for success Solution deployment and operations.

Required Content	The Interface and Integration Specifications Document shall include:
	• Executive Summary
	• Roles and Responsibilities
	• Assumptions and Constraints
	• Interface and Integration Scope and Approach
	• Integration Architecture Overview
	• Integration Inventory
	• Interface Specifications for each interface, including:
	  ○ Interface ID
	  ○ Interface Name
	  ○ Interface Type
	  ○ Business Purpose
	  ○ Source System
	  ○ Target System
	  ○ Data Flow Directions
	  ○ Integration Pattern
	  ○ Frequency
	  ○ Data Volume
	  ○ Priority/Criticality
	  ○ Technical Specifications, to include:
	    ▪ For API Interfaces:
	      • API Details
	      • Authentication and Authorization

DEL-09: Interface and Integration Specifications Document	
	• API Operations • Data Specifications • Performance Requirements • Rate Limiting and Throttling ▪ For File-Based Interfaces: • File Transfer Details • File Specifications • File Structure • File Transfer Schedule • File Validation ▪ For Message-Based Interfaces: • Messaging Infrastructure • Message Specifications • Message Handling ▪ For Database Integration: • Database Connection • Integration Method • Data Access Specifications • Transaction Management • Data Mapping and Transformation, including: ○ Field Mapping ○ Transformation Rules (data type conversions, value transformations, business logic) • Interface management and monitoring methods • Error handling controls and methods, including restart procedures • Interface testing methods and key test cases including test environment requirements • Naming conventions for real time interfaces, and batch processing file names • Interface security controls and considerations • Encryption/decryption capabilities • Administration and operational processes and considerations

DEL-09: Interface and Integration Specifications Document	
	• Interconnectivity service agreements • Process and procedures for escalation to identify, report, and address interface-related production incidents

DEL-10: Maintenance and Operations Management Plan	
ID	DEL-10
Name	Maintenance and Operations Management Plan
Description	The Maintenance and Operations Management Plan defines the approach, processes, procedures, resources, responsibilities for maintaining and operating the Solution after it has been deployed to Production. It ensures the Solution remains functional, secure, performant, and aligned with business needs throughout the operational lifecycle. This plan also outlines Performance and Capacity Management which defines the strategies, processes, tools, and metrics for monitoring, measuring, analyzing, and optimizing Solution performance while ensuring adequate capacity to meet current and future business demands, derived from the requirements in this Contract.
Required Content	The Maintenance and Operations Transition Management Plan shall include: • Executive Summary • Roles and responsibilities • Assumptions and Constraints • Purpose, Scope, Objectives • Service Level Management, aligned to SOW Attachment 3, Service Level Agreements • Maintenance and Operations Processes and Procedures • Maintenance Activities and Schedule • Maintenance and Operations Change Management • Maintenance and Operations Release Management, including Activities and Schedule • Backup and Recovery Procedures The Performance and Capacity Management Plan shall include: • Performance Requirements and Baselines, including response times, availability, scalability, capacity, and batch processing based on requirements in this Contract and SOW Attachment 3, Service Level Agreements • Performance Monitoring Strategy, Testing, and Tools • Performance Metrics, KPIs, and Reporting • Capacity Planning Approach, Process, Domains

DEL-11: Monthly Status Report (MSR)	
ID	DEL-11
Name	Monthly Status Report (MSR)
Description	The Monthly Status Report provides a monthly overview of the progress and quality assessment of the Project through the Contract term.
Required Content	The Monthly Status Report shall include: • Status Update on Project Activities and Contract Requirements • Deliverables List and Status • Milestone Chart and Status • Planned Activities for Reporting Period • Completed Activities for Reporting Period • Impediments for not completing any planned work or delayed work • Current Activities in progress with Status • Planned Activities for next reporting period • Risks, Issues, Action Items, and Decisions • Change Request Summary • Project Quality Metrics related to this period using a scorecard representation (i.e., red, yellow, green) for each metric • Projected Expenditures for next reporting period, with burndown chart • Staff Changes and Updates (current or planned) • Configuration Release Roadmap by configuration changes and other relevant updates during Implementation • Updates to base Solution roadmap during Implementation Starting at CalTABS Go-Live, the Monthly Status Report shall include: • Production Environment Availability Metrics (Service Level Agreement #2) • Recovery Time Objective Metrics (Service Level Agreement #3) • Recovery Point Objective Metrics (Service Level Agreement #4) • Incident Severity Levels Metrics (Service Level Agreement #5) • Problem Management and Root Cause Analysis (Service Level Agreement #6) • System Maintenance – Software Patches (Service Level Agreement #7) • Status update on maintenance and operations contract requirements • User statistics, e.g., current number of users, new users, inactive users • Customer support metrics, e.g., reported incidents, incidents by status, aging on incidents

DEL-11: Monthly Status Report (MSR)	
	• Defects, e.g., status, tracking through test and release, and overall management and resolution • M&O activities completed, in progress, and planned for the next period, including planned outages and their expected duration • Product/Configuration Release roadmap updated at least quarterly • Releases, outages, and release item updates (including links to Release Notes) • Relevant risks, issues, action items, decisions, and change requests

DEL-12 Pilot Completion Report	
ID	DEL-12
Name	Pilot Completion Report
Description	The Pilot Completion Report summarizes the results, findings, lessons learned, and recommendations from the Solution Pilot. It provides evidence for Go-Live readiness and documents the Pilot's success in meeting Project objectives prior to Go-Live and full Solution deployment.
Required Content	The Pilot Completion Report shall include: • Executive Summary • Pilot Overview and Objectives • Pilot Scope and Participants • Pilot Activities and Execution Summary • Solution Functionality Testing Results • Solution Performance Results • Integration Testing Results • Lessons Learned • Recommendations for Go Live and solution deployment

<table>
<tr><th colspan="2">DEL-13: Release Management Plan</th></tr>
<tr><td>ID</td><td>DEL-13</td></tr>
<tr><td>Name</td><td>Release Management Plan</td></tr>
<tr><td>Description</td><td>The Release Management Plan defines the strategy, processes, procedures, and governance for planning, testing, and deploying software releases throughout the Project lifecycle and the term of this Contract. It ensures controlled, predictable, and successful delivery of system changes to Production.</td></tr>
<tr><td>Required Content</td><td>The Release Management Plan shall include:

Executive Summary
Roles and Responsibilities
Assumptions and Constraints
Purpose, Scope, Objectives
Release Management Governance
Release Strategy and Types, to include:

Deployment model
Release frequency
Deployment timing
Deployment approach
Testing approach
Release types, to include:

Release definitions (e.g., major, minor, patch, hotfix/emergency, infrastructure)
Numbering convention for each release type
Frequency for each release type
Planning Lead Time for each release type
Testing Duration for each release type
Approval Level for each release type
Required Documentation for each release type
Examples of each release type

Release Planning Process
Release Build and Packaging
</td></tr>
</table>

DEL-14: Requirements Traceability Matrix	
ID	DEL-14
Name	Requirements Traceability Matrix (RTM)
Description	The Requirement Traceability Matrix (RTM) is a document that maps and tracks all project requirements through the Project's lifecycle, from initiation through design, development, testing, Pilot, Go-Live, and System Stabilization. It ensures all requirements are defined, addressed, validated, and verified as implemented and functioning as designed.

DEL-14: Requirements Traceability Matrix	
Required Content	The Requirements Traceability Matrix shall include: • All functional and non-functional system requirements in SOW Attachment 1, Detailed System Requirements • Status Summary, to include: ○ Total Requirements ○ Requirements Status (approved, pending approval, rejected/withdrawn) ○ Implementation Status (number implemented, number in development, number not started) ○ Test Status (number tested and passed, number testing in progress, number not yet tested) ○ Traceability Coverage (percentage of approved requirements traced to design, development, test, and implementation) • Filterable Requirements Traceability Matrix, to include: ○ Requirement ID ○ Requirement Category ○ Requirement Subcategory ○ Requirement Statement ○ Requirement Type ○ Requirement Priority ○ Requirement Owner ○ Requirement Status (Proposed, Approved, In Progress, Implemented, Deferred, Rejected, Withdrawn) ○ Link to Detailed Design Specification Document section/page where requirement is addressed ○ Implementation Reference (reference to code, configuration, or component implementing requirement) ○ Test Case IDs ○ Test Type ○ Test Status ○ Defect ID (if applicable) ○ Acceptance Criteria ○ Change Request ID Reference (if applicable) ○ Modification History ○ Version History ○ Notes/Comments

DEL-15: System Architecture and Infrastructure Specifications	
ID	DEL-15
Name	System Architecture and Infrastructure Specifications
Description	The System Architecture and Infrastructure Specifications defines the complete technical architecture, infrastructure components, design patterns, and technology stack for the System.

Required Content	The System Architecture and Infrastructure Specifications shall include:
	• Executive Summary
	• Roles and Responsibilities
	• Assumptions and Constraints
	• Purpose, Scope, Objectives
	• Architecture Overview and Characteristics
	• Technology Stack Summary
	• Architectural Principles and Design Philosophy
	• High-Level Architecture, including conceptual diagrams and layer descriptions
	• Detailed Component Architecture, to include:
	  ○ System Architecture
	  ○ Business Architecture, including business capabilities and business processes
	  ○ Data Architecture
	  ○ Technology Infrastructure Architecture
	  ○ Hosting Environment Model
	  ○ Integration Architecture
	  ○ Disaster Recovery and Business Continuity Architecture

DEL-16: System Operations and Administration Manual	
ID	DEL-16
Name	System Operations and Administration Manual
Description	The System Operation and Administration Manual serves as the authoritative guide for IT staff responsible for operating, administering, maintaining, and troubleshooting the System in Production. It contains all necessary information for day-to-day System management and advanced administrative tasks.
Required Content	The System Operations and Administration Manual shall include: • Process to operate and administer the System during Production operation • Procedures and checklists for operating and administering the System that address: ○ System start-up, shutdown, and re-start ○ Managing user accounts, access (e.g., activate, disable), privileges, and security ○ Assigning users to roles or access levels in the System ○ Password creation and maintenance ○ Error and exception diagnosis and handling ○ Changing System settings, flags, constants, and parameters ○ Reviewing and managing System logs for general activities, problems, and trends ○ Adding and modifying code values and valid values for data fields ○ Updating online help content ○ Loading and unloading data from the database ○ Storing and retrieving archived data ○ Running standard reports and ad hoc queries ○ Monitoring and managing interfaces and data transmissions ○ Monitoring and administrating System operation, performance, and capacity ○ How System problems or issues are reported, tracked, analyzed, escalated, and resolved ○ How critical System failures are reported, analyzed, evaluated, and dealt with ○ Notification process for operational problems and critical System failures with examples of what constitutes operational problems and recommendations on how best to deal with them ○ Routine periodic maintenance tasks to be performed ○ Monitoring and configuring backups and System restorations to include application software, data, and the System as a whole ○ Disaster recovery procedures

DEL-17: System Security Plan	
ID	DEL-17
Name	System Security Plan
Description	The System Security Plan describes the security controls implemented or planned for the System to meet identified security requirements.
Required Content	The System Security Plan shall include: • Executive Summary • Roles and Responsibilities • Assumptions and Constraints • Purpose, Scope, Objectives • System Categorization • Security Controls, including management controls, operational controls, technical controls, and physical controls • System Interconnections • Security Assessment Approach and Management • Incident Response and Contingency Planning

DEL-18: System Test Plan	
ID	DEL-18
Name	System Test Plan
Description	The System Test Plan defines the strategy, objectives, approach, resources, and schedule for testing the entire, integrated System and is used to verify the System meets all requirements, describing what will be tested, how, when, and by whom.
Required Content	The System Test Plan shall include: • Executive Summary • Roles and Responsibilities • Assumptions and Constraints • Purpose, Scope, Objectives • Overview of testing approach and methodology for testing that will be performed, including test phases, typical timelines, and entry and exit criteria for each phase • Description of how configuration changes will be tested, validated, and released • Approach to unit testing – individual, internal testing of configurations applied to the base product • Approach to functional and system testing using test cases • Approach to accessibility testing • Approach to cross-platform, cross-browser, and cross-operating system testing • Approach to end-to-end testing of business scenarios • Approach to performance testing • Approach to disaster recovery testing and backup recovery procedure testing • Approach to Security testing • Approach to data integrity testing • Approach to release and regression testing when releasing any new configuration to Production or lower environments • Approach to interface testing with external IT systems • Approach to integration testing • Preparation activities for User Acceptance Testing (UAT), further detailed in the UAT Plan

DEL-18: System Test Plan	
	• Testing timelines, proposed schedule, and related dependencies • Approach for tracking of test stories, scenarios, cases, and scripts to contract requirements and configured items, incorporating tester feedback during/after testing to create a better end product • Writing standards and requirements for developing test stories, scenarios, cases, and scripts • Approach for capturing lessons learned with testers after each testing cycle or phase to correct past mistakes and plan for more efficient future testing cycles or phases • Approach for reporting test results in the Test Results Completion Report, including the tracing of test scripts to requirements • Approach to defect status reporting, including identification number, title, status, including defect severity, priority, expected results, actual results, reproduction steps, assigned to/owner, system category/feature, requirement mapping, etc. • Integration with defect management • Identification and overview of tools for testing and managing testing activities

DEL-19: Test Results Completion Report	
ID	DEL-19
Description	The Test Results Completion Report documents the outcomes of System testing activities. It demonstrates that the System has been tested according to the System Test Plan and is used as an input for Pilot Start and Project Go-Live.
Required Content	The Test Results Completion Report shall include: • Executive Summary • Test Scope and Objectives • Test Execution Summary • Detailed Test Results, to include: ○ List of all Test Stories, Scenarios, Cases, and Scripts ○ Results of completed Test Stories, Scenarios, Cases, and Scripts, including but not limited to test outputs such as screen shots and sample data ○ Any outstanding Test Scenarios, Cases, and Scripts, including reasons for pending state, identification of any related blocking defects, plan for expedited resolution and resolution date, and contingency plan to ensure the Project Schedule is not negatively impacted ○ List of all System Test defects and defect categorization, such as identification number, title, severity, priority, expected results, actual results, reproduction steps, defect aging per defect category, assigned to/owner, system category/feature, requirement mapping, etc.

DEL-20: Test Support Materials	
ID	DEL-20
Name	Test Support Materials
Description	The Test Support Materials include all materials used to execute and support all testing activities. Materials are intended to be provided separately from the System Test Plan and may be reflected in test tools.
Required Content	The Test Support Materials shall include: • Test Support Materials Summary that includes a list and description of all Test Stories, Scenarios, Cases, Scripts, and any other test materials applicable to a release. • Completed and outstanding Test Stories, Scenarios, Cases, and Scripts for System/Functional Testing and UAT • Testing tracker including information on the different test phases, environments, testers, and status of Test Scenarios, Cases, and Scripts • Outputs of lessons learned meetings with testers after each testing cycle or phase to correct past mistakes and plan for more efficient future testing cycles or phases. • Test assessments or reports for different test phases or environments, if different than the Test Results Completion Report • Access to tools for testing and managing testing activities for designed State resources • Training or knowledge transfer on testing tools and materials for designated State resources

DEL-21: Training Materials	
ID	DEL-21
Name	Training Materials
Description	The Training Materials include all materials used to execute and support training activities.
Required Content	The Training Materials shall include: • User manual(s) or guide(s) for State administrators • Instructor Manual for Train-the-Trainer training • Online help materials • Job aides or quick reference guides • Training tools • Training materials and content tailored for State users

DEL-22: Training Plan	
ID	DEL-22
Name	Training Plan
Description	The Training Plan describes how State administrators and Trainers will be trained on the System.
Required Content	The Training Plan shall include: • Executive Summary • Roles and Responsibilities • Assumptions and Constraints • Purpose, Scope, Objectives • Training: ○ Training strategy, objectives, and scope ○ Overall approach for developing and delivering training to users ○ Types of training materials to be created, such as job aids, user manuals, quick reference guides, videos, and online training ○ Training delivery approach and methods, both online and in-person ○ Types of materials to be created or modified and descriptions of each ○ Approach and method for categorizing training audiences and identification or alignment of training material and method ○ Identification of required staff, facilities, tools, or other items critical for training delivery and execution ○ Development approach and review cycle of training materials ○ Training objectives for each training audience and process for evaluating and assessing training outcomes to validate training objectives were met ○ Process for collecting, utilizing, and incorporating trainee feedback to improve future training offerings ○ Approach to establishing, providing access and support of the training environment ○ Train-the-Trainer approach, i.e., creating and delivering a train-the-trainer offering for the State to provide training to their users/customers ○ Maintenance and updates of training materials ○ Management of Training Environment roles, profiles, and availability

DEL-23: Transition and Close Out Plan	
ID	DEL-23
Name	Transition and Close Out Plan
Description	The Transition and Close Out Plan outlines the process for ending contract services and transitioning System ownership, data, and operational responsibilities back to the State or to a replacement vendor. It ensures business continuity and protects State assets when a contract ends.
Required Content	The Transition and Close Out Plan shall include: • Executive Summary • Roles and Responsibilities • Assumptions and Constraints • Purpose, Scope, Objectives • Transition Timeline and Milestones • Service Transition Strategy • Data Extraction and Migration Plan • Data Validation Process • Data Deletion and Security • Project Artifacts and Documentation • Support Structure for Transition • Contract Close Out