

**OHIO DEPARTMENT OF HEALTH
ENVIRONMENTAL HEALTH DATA SYSTEM
INTEGRATION SERVICES
TECHNICAL ENVIRONMENT DOCUMENT (FIT
GAP ANALYSIS RESULT) & SCHEDULE
NOVEMBER 9, 2012**

TECHNICAL ENVIRONMENT DOCUMENT (FIT GAP ANALYSIS RESULT) & SCHEDULE

*Ohio Department of Health Implementation of HealthSpace Environmental Health
Data System*

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TECHNICAL ENVIRONMENT DOCUMENT (FIT GAP ANALYSIS RESULT) & SCHEDULE

Ohio Department of Health Implementation of HealthSpace Environmental Health Data System

Introduction

HealthSpace reviewed the State's EH DSI solution business requirements as identified in Supplement One of the RFP. A Requirements Affirmation was required to further detail and confirm ODH's priority requirements. The purpose was for HealthSpace to compare the requirements of their proposed solution and identify and reaffirm whether the requirements can be currently met out-of-the box, or if the requirements is configurable or if the requirement had to be customized. The work contemplated by the RFP was defined by the accepted response provided by HealthSpace USA Inc. to meet the stated needs and objectives of the Bureau of Environmental Health. The response detailed HealthSpace experience, technology and general approach to developing, deploying and supporting enterprise level data management systems. The Requirements Affirmation Results and resulting gap analysis and Schedule summarizes the approach and details the steps required by both parties to successfully deploy the integrated environmental data system. This document will evolve as more details and requirements are identified.

Methodology

The Requirements Affirmation and Gap Analysis were done in two stages.

1. HealthSpace produced a narrated, online video outlining the standard features of the proposed system that could meet the EHDSI requirements out-of-the-box. This was reviewed by the ODH project managers and subject matter experts.
2. HealthSpace and ODH conducted a series of Requirements Affirmation meetings to agree on the functionality of the elements of the system that needed customization. The meetings included the following either in person or via GoToMeeting conferencing:

HealthSpace Project Director

HealthSpace Work Manager

HealthSpace Configuration and Technical Lead

HealthSpace Training Lead

ODH Project Manager

ODH Work Manager

ODH Technical Lead

ODH Business Team Lead

ODH Subject Matter Experts

Representatives from the Local Health Districts

Four meetings were conducted on October 5, 2012, October 10, 2012, October 19, 2012 and November 1, 2012.

In addition, the specified out-of-the-box elements were reviewed and, in some cases, functionality was further defined.

Gap Analysis and Schedule – Appendix A and B

The discussions over the four Requirements Affirmation sessions were summarized into a spreadsheet that paralleled Supplement One of the RFP which identified the system requirements and priorities. The System Element Gaps were separated into three categories:

HealthSpace – Clarification was sufficient for HealthSpace to proceed with design and development

ODH – Discussions must take place within ODH and decisions made on functionality for further clarification before HealthSpace can start design and development.

Both – HealthSpace will design and develop the element with further and that further input may be required from ODH before design is finalized.

The development of the elements has been divided into two groups. Priority 4 and 3 items will be designed and developed before deployment of the three phases and Priority 1 and 2 items will be developed and deployed as system enhancements immediately after Phase 3 deployment. Certain low priority items may be deployed earlier if an item can efficiently be put into the workflow.

Each element gap has a Work Schedule Task Number where it will be resolved.

Appendix A is sorted by the original Requirement number whereas Appendix B is sorted by the Work Schedule Task number.

Revised Work Schedule – Appendix C

The Work Schedule has been revised to account for the Requirements Affirmation meetings and to identify the additional tasks required by ODH to provide clarification on the identified elements. Also included on the revised Work Schedule is the timing of the development and deployment of Priority 4 and 3 items and Priority 1 and 2 items.

Appendices

Appendix A

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
1.1.1 - Plan Review	The hosted solution will enable customer or regulator to enter and submit application for Plan Review via EH public portal which will include the ability to upload required documents (e.g., data sheet, vicinity map, site map etc.) in multiple electronic formats including graphic software.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed	<ul style="list-style-type: none"> Different requirements for different modules. State to submit standard requirements, LHD's who need more info would notify customer, or have local additions to online submission. Forms to be submitted to HS. both ODH and LHD forms needed to determine what is needed, ODH and LHD's to identify mandatory at state and local level, what is additional info but not mandatory, what will be needed to allow saving of draft, what is needed to "complete". Some program plan reviews (eg. Pools, campground, labor camp) come first to the State for approval then to the LHD. Other programs straight to LHD (food, temp campground, sewage, well) Attachments and scanning will need to be accepted on line with Plan review (yes, this is understood by HS) Digital signatures on the portal for completion of plan review Enter address/city first then if LHD is not participating in online submission, notification to be provided they cannot complete an online plan review. Program should interact with State GIS directory to help user Date and time stamp on online submissions is required Once online portal ready LHD's to contact users/customers 	Gap	Yes	HealthSpace	34
1.1.2 - Plan Review	The hosted solution will enable regulator to customize (add, delete, modify) information on standardized plan review application form, including which data fields are and attachments are required to be deemed acceptable for submittal.	4	X Customization Required	Customization required for changes to data fields captured on the Plan review	<ul style="list-style-type: none"> Customization will be required to allow for the fields to be collected as required by ODH. Fields will be context sensitive in that Food will have different fields from Pool, etc. These will be hard coded by HealthSpace for all districts as required by ODH. 	Gap	Yes	HealthSpace	34
1.1.3 - Plan Review	The hosted solution will enable regulator to accept, or ask for more information, for the plan review; thus, assuring that the plan review is complete (i.e., holds adequate and necessary information) before the system will assign a 30-day review timeline.	4	X Out of the Box	Status field available for regulator to accept or request information on the plan review document	<ul style="list-style-type: none"> Solution needs more than a status field. Errors by customer, LHD could send notifications to correct 30 day timer clock must be stopped when the LHD sends information back to the user and restarted once user re-submits. Questions and discussion about how amendments should work. Gene- A customer must have the ability to amend and update plan review and submit. Currently any document in the system can be sent via email by going to Actions Forward. HS will add the ability into the Online Portal to make the process better as customization required. 	Gap	Yes	HealthSpace	34
1.1.6 - Plan Review	The hosted solution will enable regulators to add, change or delete applicable plan review data in the system contingent on role-based criteria defined by regulator.	4	X Out of the Box	Role based features available for deletion and edits to documents	<ul style="list-style-type: none"> Current Roles for Ohio users have been sent to ODH. ODH to return the roles with OK or modifications requested. 	Gap	Yes	ODH	24
1.1.7 - Plan Review	The hosted solution will capture and maintain all information specified by regulators for plan reviews with minimum of data collected on regulatory-approved plan review form. Note: Date and time stamp will be based on complete application received for tracking of approval process (ex: 30 days approval).	4	X Out of the Box	Plan review documents are currently available and have time and date stamping and can track the review from pending to approved	<ul style="list-style-type: none"> Online portal will auto date and time stamp the document when it is completed by the public user and submitted to the district. Should the district have a question, the regulator will have an automated way to request information back to the user via email which will stop the 30 day counter. The 30 day counter will restart when the user submitted back to the district. The time tracking is manually completed for each record that the EHS is tracking time. 	Gap	Yes	HealthSpace	34
1.1.8 - Plan Review	The hosted solution will maintain updatable list of pre-defined missing document list based on regulator approved criteria.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed	<ul style="list-style-type: none"> Requirements need to be determined by ODH LHDs to submit documents, then State to answer what are the requirement Applicant should be able to log in and create, edit, then submit. 30 day would not begin until all information is submitted, then assigned to the sanitarian. submit as a draft to "cart" then go back in and finish, then a notice should be given if not all complete. when submitted and complete a notice that lets them know that it is complete and they will be hearing from the Health Department. once submission is final, no more edit by customer. what will happen to lingering pending. a notice on shopping cart page, autodelete? or LHD can view even pending files on the site, and that they can notify submitters that this From the standpoint of applicant: application should not be left hanging, with the public having an that something is happening with the application. Maybe email notification after time Online submission is not mandatory, just additional convenience. They still can come into office as traditionally done. 	Gap	Yes	Both	35

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
1.1.9 - Plan Review	The hosted solution will restrict data elements that customers can change on-line, as defined by ODH/LHD. Other data element changes will require approval by ODH/LHD staff before the amendments are saved.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed	<ul style="list-style-type: none"> Is there a limit to how long a pending application should remain at the "shopping site"? not really a good idea to delete, maybe email reminders after a certain length of time, would the LHD look at pending requests online...processes to be determined They will be able to pay online LHD's to set up local amounts, interaction with epay. Some LHD do not charge plan review fees, "0" fee to be set up Portions of online documents to unlock for changes and amendments will be more difficult than unlocking a whole document. Need to discuss further if it is a requirement. 	Gap	Yes	HealthSpace	34
1.2.3 - License / Permit	The hosted solution will generate an automatic reminder e-mail or a standardized letter (for those customers lacking email ability) to facility/ owner/operator up for license/permit renewal, including generating attachments of appropriate license/permit materials based on regulator (e.g., ODH, specific LHD) specified schedules and jurisdictions. These license/permit materials are required to be sent along with the customer's renewal reminder and other supplemental documents as attachments which are based on: type of license/permit, the last two year's active license/permit population, and expiration dates.	4	X Configuration Required	Standardized Renewal applications are currently available in a printable manner. Automated emails would need to be configured	<ul style="list-style-type: none"> what if email has changed? will there be notification to the LHD? HS to develop for email "black hole". HS does not batch emailing of renewals at this time, no one has asked. Mark suggested staggered renewals Email, then paper. Add email requirement to application, and to payment portal. Also gather during inspection so that future emailing of renewals will be effective Question from participant: Should there be some type of notation when email was sent? Decision needed Mike Vogt: three options for licensee to get renewal go to secure site, where could be uploaded, email and print Question from participant: March 1st is a deadline and a letter would be sent identifying lack of payment. MK response: this is all currently part of the system (up to 4 scheduled letters to be sent for payment) Mobile license is effective state wide. payment to LHD of origin. Inspection in different HD inspection sent to originator. MK suggested a version of Temporary Vendor database where each LHD could see all inspections and permits. Decision needed temporary is different than Mobile. Mobile has yearly license that can go everywhere. inspect anywhere, but the idea of a common database has benefits to see all inspections pending actions and suspended licenses. Decision needed HS agrees that email will be configured for processing renewals. 	Gap	Yes	Both	35
1.2.5 - License / Permit	The hosted solution will enable authorized regulator to view, retrieve and edit all license/permit information (data fields) based on license/permit type (e.g. initial, renewal etc.) and EH Program area.	4	X Out of the Box	All documents can be viewed and role based users can edit license/permit data to keep the document current	No client to date has allowed online changing of the # of sites, more discussion will be needed on the online portal for what should be allowed or not.	Gap	Yes	ODH	25
1.2.11 - License / Permit	The hosted solution will have defined status markers for license/permit records in order to identify the different stages for processing of licenses and permits, as specified by ODH.	4	X Configuration Required		<ul style="list-style-type: none"> A pool facility has to go through two stages before turning over to the Local Health Dept. add to status stages. These details to be provided to HS for development In sewage and well, process is significantly different due to regulations, where the status can be tracked to specific items. Permit status will work across the board. 	Gap	Yes	Both	35
1.2.12 - License / Permit	Enable regulator to approve license/permit only after the Ohio business rules are satisfied (i.e., after successful completion of facility inspection, sampling, etc. as required), or designate another status (e.g., Pending, Deny, etc.).	4	X Out of the Box	Ability to approve license based on business rules is currently available	Rules will be needed from ODH as to specifics. The system can manually changed to Pending, Permitted, Out of Business, Suspended, etc. Certain parts of the system have some rules in place such as you cannot generate a permit until a payment is received.	Gap	Yes	ODH	26
1.2.16 - License / Permit	The hosted solution will send an automatic e-mail confirmation of the license/permit issued or renewed to facility owner and other specified contacts on file (e.g. corporate office). If no e-mail information is available for the customer, the hosted solution will prompt and enable the regulator to generate a letter instead.	4	X Configuration Required	The system currently tracks approval and approval dates of the issued license. Email addresses are also currently entered into the owner record, allowing for the configuration of this requirement	ODH needs to determine what the format needs to be on the permit. ODH Decision needed.	Gap	Yes	ODH	27
1.2.17 - License / Permit	Enable the regulator to print license/permit before final approval.	4	X Configuration Required	Currently audit numbers are assigned as the document is printed. Configuration would be needed to allow for a print draft	ODH might want to remove the preprinted paper and should the license be able to be printed before using the security paper. ODH Decision needed to stay as is or change the current process.	Gap	Yes	ODH	28
1.2.20 - License / Permit	As defined by regulators, the hosted solution will restrict data elements that a customer can change on-line after it has been submitted to the regulator. However, the solution will enable automatic changes to an approved license/permit as the regulator authorizes.	4	X Customization Required	The function will be non-editable after submission and editable after approval.	Changes to data elements restricted for the customer on line. To be determined by ODH what changes can be entered on line and what cannot.	Gap	Yes	Both	35

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
1.3.1 - Inspection	The hosted solution will enable customers to request an inspection.	1	X Customization Required	Once an application is received or approved the licensee can then apply for an inspection.	<ul style="list-style-type: none"> • Example(Pool) construction inspection; a request would go to the queue, • HS currently has editable inspection dates for facilities that could be used for this process. • Would Customer can make a request date, or just a queue? HS needs to know requirements. • makes most sense to have or supervisor get the email and then to schedule. 	Gap	Yes	ODH	115
1.3.9 - Inspection	The hosted solution will capture all inspection data (i.e., notes, text selections, electronic signatures with date and time stamp as it is saved.	4	X Out of the Box	These items are all currently available	Discussed that signatures can be captured on the local installation version. Web based signature capture is limited based on web functionality. Amanda from Clermont noted that they would like to see a signature alternative to a signature capture device due to the cost of these devices. Gene is waiting for feedback from Legal on this issue and will need further discussions.	Gap	Yes	ODH	29
1.3.11 - Inspection	The hosted solution should enable the internal user to draw electronic version of plan/layout (scale layout drawing).	2	X Customization Required	Currently drawings may be imported	<ul style="list-style-type: none"> • not good quality to draw with stylus right in field in application . not as easy as using paint or easy cad and then import. • Gene: How would it work? You would have to have the paint or easy cad program; create drawing, save it and import it. HS strongly suggest a paint or CAD program, more functionality, sewage, well and mobile on back put on a drawing of the mobile layout. • Question from participant: A contractor will provide drawings (eg. as built) can these be uploaded? Yes. • Not as much control on the web browser interface as on computer. 	Gap	Yes	Both	116
1.3.12 - Inspection	The hosted solution should enable a regulator (i.e., sanitarian inspector) to upload all inspection data and other collected electronic attachments into the hosted EH DSI solution (accept in multiple formats, e.g., Word, PDF, jpg, etc.).	4	X Configuration Required	In order to preserve the ability to report, inspection information must be entered into the system using the inspection data collection form. This can be set up so that local systems can transmit data directly into the ED DSI solution. Other electronic documents can be uploaded in multiple formats.	Inspections can be uploaded into the system. Some discussions led that the prior inspections may or may not want to be imported. Some discussed that they would rather start fresh with the new system and others want to scan and attach the old inspections. HS says all of these are possible options that there should be a business role identified if the State has a preference.	Gap	Yes	ODH	30
1.3.20 - Inspection	Enable the regulator to automatically notify (email and/or generate letter) to customer, that inspection has been completed and triggered based on status change.	1	X Configuration Required	Automated notifications via email or letters would need to be configured	ODH to let HS know what processes they would want to be completed before the inspections would be emailed. HS presented 2 options to have a button "Print Inspection" as is there now to view on screen and let the system know that the inspection is ready for email. HS would advise against a simple time frame after completion or on document's first save to ensure that a partial report isn't sent.	Gap	Yes	ODH	115
1.5.1 - Survey	The hosted solution will automatically send email reminder to appropriate ODH regulator about survey dues to be scheduled.	2	X Customization Required	Email subscriptions for reminders can be set up by the regulator once a survey module is created	<ul style="list-style-type: none"> • ODH to send email reminder to LHD that survey is scheduled • Process will change for admin component which ODH could do with online Reporting but sanitarian evaluations remain as scheduled site visits. Will reduce time in LHD offices 	Gap	Yes	Both	116
1.5.3 - Survey	The hosted solution will capture and maintain survey schedule and assign staff survey work as determined by the authorized internal user, including cancelling and rescheduling based on user role.	4	X Customization Required	Scheduling and assignment of work is currently available, and can be a role based function	HS does not currently have survey module, but it should be similar to inspection process	Gap	Yes	HealthSpace	34
1.5.7 - Survey	The hosted solution will send automatic email survey report when completed based on trigger point (e.g. status change). The email list will be as specified by ODH and be updatable.	4	X Customization Required	A Survey module with required forms will need to be created	reports will be used to set this up once survey module is available	Gap	Yes	HealthSpace	34
1.5.8 - Survey	Enable the ODH internal user to mark status of the survey process at different stages as specified.	4	X Customization Required	A Survey module with required forms will need to be created		Gap	Yes	Both	35
1.5.9 - Survey	The hosted solution will notify specific ODH internal users (e.g., manager, inspector) about next survey or re-survey via email, or have the ability to generate a hard copy letter for those facilities that do not have a working email address in the system.	4	X Customization Required	A Survey module with required forms will need to be created		Gap	Yes	Both	35
1.5.12 - Survey	The hosted solution will automatically check that the required fields are entered before the survey can be completed, and will alert users with missing steps in-order to complete survey successfully.	4	X Customization Required	A Survey module with required forms will need to be created		Gap	Yes	Both	35

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
1.6.1 - Complaints	The hosted solution will accept electronic and paper complaints from the public which at a minimum must include fields specified by the regulator and a free-form text "Notes" section to explain the complaint.	4	X Customization Required	Complaints are currently available, with a minimum data set required, receiving complaints electronically requires configuration	<ul style="list-style-type: none"> Explanation: has a complaint module but no online submission of a complaint, Consider response to complaint requirements Consider required fields. ODH and LHDs take in varying amounts of detail. What level of anonymity to the complainant Notification to sanitarian. How to determine who will be assigned Decisions to be made on how to associate the complaint with particular facility across LHD borders. Some by Geocoding, possibly by website look up the complaint can be unattached or attached to a physical location, or to a facility. Discussion of complaint vs. foodborne illness complaint. More discussion needed as to when entering online is it truly a food borne illness complaint or a general complaint. checks and balance to be in place when someone is handling the complaint 	Gap	Yes	Both	35
1.6.6 - Complaints	When the email address was provided by the complainant, the hosted solution will automatically follow-up with an email response to the complainant with a tracking number. The response will include standard text in the body of the letter which can be customized if necessary. However, if complaint was received via telephone or in a written document, the regulator will enter the complaint manually and be able to generate a response letter with a tracking number.	4	X Customization Required	Automated emails would need to be configured for complaints.	When someone submits they get a tracking number so they can log back into the system and find status of the complaint. whole status can be tracked currently, HS will need to be able to provide the portal with information updates.	Gap	Yes	HealthSpace	34
1.7.1 - Certification	For Level 1 and Level 2 certifications, the hosted solution should enable potential providers (i.e., customers) to submit registration application forms for certification training classes with required fields specified by ODH.	2	X Customization Required	A certification application is currently available for the internal user to enter on behalf of customers, but there is no public portal at this time	<ul style="list-style-type: none"> At some locations Level 1 is LHD, Level 2 is ODH. HS would need details as to what that means programmatically. 	Gap	Yes	Both	116
1.7.2 - Certification	For Level 1 and Level 2 certifications, the hosted solution should enable each regulator/customer to display and update the dates and times for the available training classes.	2	X Customization Required	Dates and times of training classes are currently visible and editable for internal users.	<ul style="list-style-type: none"> email blast and advertise course offering information to be provided on how to advertise who to email online application and pay features, Gene to Jean: list what is done at state and local levels and this needs to come to HS via Margie. 	Gap	Yes	Both	116
1.7.4 - Certification	For Level 1 and Level 2 certifications, the hosted solution should be able to generate a receipt notification and provide it to the customer when the registration application form is submitted and payment received.	2	X Customization Required	Generation of receipts upon payment is currently available	The manual process currently does this functionality but discussions have indicated this is a two part process. This would be sent via an email in the Online Portal. For the Portal option, this would need to be customized. Receipts need to be generated for Certificates.	Gap	Yes	HealthSpace	115
1.7.8 - Certification	The hosted solution must capture, and maintain a list of providers (with course and exam information) approved by ODH for selecting and viewing by the customers (i.e., the applicants who may be internal users, external users, or public entities).	2	X Customization Required	A provider list can be compiled and entered into the course/class. This list is viewable by the internal user, the public portal to view this will be developed		Gap	Yes	Both	116
1.7.12 - Certification	The hosted solution will enable regulators to enter a free-form text in a "Notes" section for internal reference.	4	X Out of the Box	Free form text fields are currently available in the Certification module to track additional notes	HS verified that the is not Notes section and that it will need to be added (configured) in.	Gap	Yes	HealthSpace	34
1.7.13 - Certification	The hosted solution will generate a unique Level 2 Certification number and assign it to an individual Customer once the Level 2 course has been completed.	2	X Out of the Box	Unique Identifiers for Certificates and or Customers is currently available	HS verified that it will have to be coded for the Level 2s.	Gap	Yes	HealthSpace	115
1.7.14 - Certification	The hosted solution shall enable ODH to generate a Level 2 certification card to send to individuals who have completed and passed a Level 2 certification course.	2	X Out of the Box	Generation for Certificate cards is currently available	ODH clarified that there needs to be a card printed rather than a certificate. HS to shrink the certificate to card size and change wording as directed by ODH after requirements received.	Gap	Yes	Both	116
1.8.1 - Recall	The hosted solution will enable ODH to customize and generate recall notice letter.	4	X Customization Required	There is no Recall process currently available. Analysis and development are needed	<ul style="list-style-type: none"> If any LHD has anything available as far as documents or forms get it to Margie to get to HS. Recall forms have been provided to HS. when recalls comes to ODH, ODH to put recall list on line it would kick out email to all who will want to see it. individuals at LHD facilities. Sanitarians could subscribe to a notification of recalls and they could then send this on to the licensees. Licensees could request the email notification Gene: by starting on this process it can be determined if this is the best way to communicate the information? and other options may be made available 	Gap	Yes	Both	35
1.8.2 - Recall	The hosted solution will enable ODH to send email with customized recall letter to recall distribution.	4	X Customization Required	There is no Recall process currently available. Analysis and development are needed		Gap	Yes	Both	35
1.8.3 - Recall	The hosted solution will enable ODH to publish Recall Notices on the Public EH DSI site.	4	X Customization Required	There is no Recall process currently available. Analysis and development are needed		Gap	Yes	Both	35
1.8.4 - Recall	The hosted solution will enable ODH to update or replace a specific Recall Notice list when a newer Recall Notice is issued.	4	X Customization Required	There is no Recall process currently available. Analysis and development are needed		Gap	Yes	Both	35

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
1.8.5 - Recall	The hosted solution will enable ODH to collect, upload, store and publish Recall Notice data from federal as formatted and published by the outside entity (e.g., FDA, CDC and USDA, etc.).	4	X Customization Required	There is no Recall process currently available. Analysis and development are needed	<ul style="list-style-type: none"> Listed as Not available, however might have been misunderstood This is NOT about the ability to direct feed into HS DSI ODH checks out FDA, USDA etc sites for recall statements. ODH chooses what to bring down from the site, might put their own edits. Then it should be available to upload and distribute out to applicable recipients. 	Gap	Yes	Both	35
1.8.6 - Recall	The hosted solution will enable the ODH to combine all Recall Notice data collected from all sources to create a master list of Recall Notice over a specified period of time.	3	X Customization Required	There is no Recall process currently available. Analysis and development are needed		Gap	Yes	Both	35
1.8.7 - Recall	The hosted solution will enable ODH to provide additional detailed information on Recall Notice for the Public viewing site.	3	X Customization Required	There is no Recall process currently available. Analysis and development are needed		Gap	Yes	Both	35
2.1.1 - EH Portal (User Interface)	The hosted solution should provide, enable electronic signatures that comply with Ohio law with applications and amendments (e.g., plan review, license/permit, certification/registration).	3	X Out of the Box	Electronic signature fields can be added to most documents	HS clarified that the end user would need to capture signatures in the field thru their hardware; also HS now has e-signature for inspections to a printable record. Waiting for clarification from ODH Legal as to what ODH can and can't do. HS can provide computerized signature capture, text only capture or no capture for paper based signing.	Gap	Yes	ODH	35
2.1.7 - EH Portal (User Interface)	The hosted solution user interface compliant with American Disabilities Act (ADA) guidelines.	1	X Customization Required	This is not part of the system design. However, required elements can be porgramed into the system with respect to large type, voice recognition, voice to text, etc.		Gap	Yes	Both	116
2.1.8 - EH Portal (User Interface)	The hosted solution compliant with the Older Americans Act development standards for user screens.	1	X Customization Required	As previously stated.		Gap	Yes	Both	116
2.1.9 - EH Portal (User Interface)	The hosted solution non-secure site (general public) should have flexible configuration abilities to allow ODH to add, change or delete content information (e.g. policies, bulletins, notifications) and links to the pages (e.g. Reporting Tools, other ODH EH web systems).	4	X Customization Required	This requires and client editable web site which is not available as a standard feature.	<ul style="list-style-type: none"> What kinds of sites and links would be hosted from our site. Functionalities are available, what HS need are details. Gene: envisioning better communication to customers ability to post things like are program wide; eg policy changes, variances, director's letter, and there would be a location that affected users would see. The important thing is to communicate information to individuals. similar to share point? they will go in and they can see various references and links. An LHD would see things that Customer would not. what level of changes could be done by the user. A program manager should be able to upload to applicable program on site, there would be level of review and then posted Question how would userslink to it? our site their local site ODH site? Many options are available Dwayne, from Warren said he wants link right on his local website There would be a portal for general and for internal 	Gap	Yes	Both	35
2.1.25 - EH Portal (User Interface) Notifications/Alerts	The hosted solution should be able to incorporate work item routing and queuing to send on-line alerts to identified ODH/LHD staff	2	X Out of the Box	A workload balancing tool can assign and queue inspections due and schedule staff in calendar	HS Functionality available for inspection routing and queuing; ODH stated that they need the trigger alert for Plan Review also.	Gap	Yes	HealthSpace	115
2.1.26 - EH Portal (User Interface) Dashboard Capabilities	The hosted solution should have a dashboard work list view for various functions (e.g. inspections, plan reviews, surveys) for staff to be able to drill down into the record for edit or view.	3	X Configuration Required	This is set up to meet the department's specific needs.	HS say they have many ways to achieve the users' needs, but it can be modified to meet specific needs; confirmed that this will need configured according to those needs.	Gap	Yes	ODH	32
2.1.28 - EH Portal (User Interface) Dashboard Capabilities	The Dashboard should be flexible enough to add Key Performance Indicators (KPI) information and track key relevant information on demand.	1	X Configuration Required	As previously stated.	Gene: Need to understand the context of request- design build concept - work queue capability automated reports. example: show if they are on track for scheduling. The vision is that the data be viewable among Health Districts at three levels. example: inspection data query for state, region, local. HS will configure as they identify the KPI criteria to set up the Dashboard.	Gap	Yes	Both	116
2.1.31 - EH Portal (User Interface) On-Line Application Submission	The hosted system will accept on-line, real-time entry and amendments of application forms or complaint document records requests through the EH Portal, including initial entry of application requests pending determination.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35
2.1.32 - EH Portal (User Interface) On-Line Application Submission	The hosted solution should enable specific authorized regulators to add, change or delete all data fields in any record selected contingent on role-based criteria defined by regulator with a tiered approval and management approach.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35
2.1.33 - EH Portal (User Interface) On-Line Application Submission	The hosted solution will automatically generate a ID number for license/permit, certification/registration, etc. based on type of application received through the EH Portal application submission process.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
2.1.34 - EH Portal (User Interface) On-Line Application Submission	The hosted solution will use the ID number to link attachments submitted by mail to electronic application request.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35
2.1.35 - EH Portal (User Interface) On-Line Application Submission	The hosted solution will automatically notify the submitter of invalid web application entries and which field(s) caused the edit to fail.	3	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35
2.1.36 - EH Portal (User Interface) On-Line Application Submission	The hosted solution will provide an on-line EH Portal tutorial to assist the customer in the completion of all types of application submissions to guide users through the screens they must complete.	2	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed	tutorial video or written documentation can be provided	Gap	Yes	ODH	115
2.2.24 - Reporting & Inquiry - Geographic Information System (GIS)	The EH DSI solution must collect longitude and latitude data for all program areas, based on address entered. The solution must store these values in a format conducive for GIS mapping.	4	X Out of the Box	Global position on the Physical Location document is currently available.	More discussion needed between HS and ODH for the ODH tool to collect the GPS coordinates from an address.	Gap	Yes	Both	35
2.2.25 - Reporting & Inquiry - Geographic Information System (GIS)	The GIS functionality must correlate and determine the correct jurisdiction assigned by ODH using the LHD directory data which is an ODH internal application.	4	X Customization Required	GIS information is collected in the system. Interfaces are produced to use with existing GIS systems.	Gene: When public enters address for application or complaint Health District can be found. MK: Resource from State that will find address. Mark: ODH to maintain list and provide HS an export when it is updated.	Gap	Yes	Both	35
2.2.29 - Reporting & Inquiry - Geographic Information System (GIS)	The EH DSI solution should provide a GIS data browser that has the ability to display several data layers on the fly, including at a minimum ODH/LHD specific data and base map information, such as; aerial photography, roads, land use, soils, topography, and water bodies.	2	X Customization Required	This functionality is currently not available but could be programmed into the system.	Gene: want to use GIS esp sewage and wells. does not need to be in the system collected for export to another system	Gap	Yes	Both	116
2.2.30 - Reporting & Inquiry - Geographic Information System (GIS)	The hosted solution's GIS browser should have the capability to be linked to all EH Programs implemented and accessible through the EH Portal.	4	X Customization Required	Data interchanges or interfaces can be programmed into the system to meet this requirement.	See 2.2.29	Gap	Yes	Both	35
2.3.1 - Electronic Payments and Accounting	The hosted solution should have the ability to integrate with state-approved electronic payments system for the specified fee that the EH hosted solution automatically calculates based on the presiding jurisdiction and application form types including late fees. Note: The financial transaction will be processed outside of the EH DSI solution through a third party system and bank as determined by the state's accounting agreement with that third party.	4	X Configuration Required	Electronic payments processes are currently available. Configuration is needed to work with the specific process within ODH	Intro by MK all payments paid through portal and reconciliations reports will be created Donica: two projects C-Boss and then when payment posted, payment is split monies directly deposited in correct accounts C-Boss will need information from LHD's about any account information and ODH will require this info asap. Gene: Plan, not official yet. ODH to cover costs for electronic transactions from C-Boss. Waiting on C-Boss for costs Margie: if ODH covers cost it should help to get the by in, for future, cannot ask public to cover transaction costs. Donica: Decision to be made if it will be required of all LHD's to use or optional.	Gap	Yes	Both	35
2.4.4 - Workflow Management	The hosted solution will allow workflow of the electronically submitted applications and documents into the appropriate regulator (i.e., ODH or LHD) workflow queue. The hosted solution enables automatic notification that a new EH application or amendment to an existing record has been submitted on line and placed in the appropriate regulator queue based on jurisdiction.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed	Already discussed, email notifications. Gene: when public is working in the public portal on plan review or application this should auto update the database MK we will need to understand which areas the LHD may not want to auto update	Gap	Yes	Both	35
2.4.7 - Workflow Management	The hosted solution should escalate correspondence and phone contacts which have not been responded to within ODH/LHD defined timeframes to appropriate supervisory staff.	2	X Customization Required	This feature is not currently available. Analysis of ODH's needs and development would be required	ODH to send the workflow process for future discussion.	Gap	Yes	Both	116
2.4.8 - Workflow Management	The hosted solution will automatically route complaints entered from the public into the system to the appropriate jurisdiction (specific LHD) which should be based on site address of the place where the alleged violation occurred as the public entered on the complaint form.	3	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35
2.4.9 - Workflow Management	The hosted solution must enable regulators to "re-route" complaints manually to other program areas and/or jurisdictions (LHDs) if necessary.	4	X Out of the Box	Complaints can currently be modified to edit types and modules. The capability to move the complaint to another jurisdiction is also available	Gene wants to see record that complaint came in, but did not count towards reporting. Gene: Ability to re-route, applications, and complaints will be tied to the directory, and the process needs to be audited or tracks. Not wanting to introduce a second requirement. He sees this as two pieces of one process. So it does not get lost.	Gap	Yes	HealthSpace	34
2.5.2 - Time Tracking/Cost Methodology	Allow to auto populate time captured in each EH program module into Cost Methodology section by each user ID.	4	X Customization Required	Cost methodology requirements would need to be analyzed and built into the system	Gene: time tracking as entered it auto populates into cost methodology. all activities move to cost methodology to help determine LHD fees. Rules have been sent to MK for Food. If time is entered we would just need to build the calculations on a report. Margie: Pool cost methodology must be submitted to MK.	Gap	Yes	Both	35

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
2.5.8 - Time Tracking/Cost Methodology	The hosted solution should have the ability to integrate with state-approved electronic payments system for the specified fee that the EH hosted solution automatically calculates based on the presiding jurisdiction and application form types including late fees. Note: The financial transaction will be processed outside of the EH DSI solution through a third party system and bank as determined by the state's accounting agreement with that third party.	4	X Customization Required	Electronic payments processes are currently available. Configuration is needed to work with the specific process within ODH	Late fees can be set up in the system. Electronic payments dealt with in separate section	Gap	Yes	ODH	33
2.5.9 - Time Tracking/Cost Methodology	The hosted solution will allow the regulators' data to automatically populate cost methodology worksheet, and allow printing on demand (as well as have standardized reports on a prescribed schedule)	4	X Customization Required	Cost methodology requirements would need to be analyzed and built into the system	Gene: Fees can be set lower than what cost methodology is set at, but not higher. Can fee amounts be edited during the fiscal year? Yes	Gap	Yes	Both	35
2.7.8 - Self-Service Management	The hosted solution will have the ability to generate and send mass email notices.	4	X Customization Required		We track email therefore we will be able to use this for future email requirements. System has the ability to email we need to hook up to the correct processes and meet specific Margie: understood this to be adhoc mass email. Did not have the intent to work with another specific process. MK: HS understood this as well, we would need to look at parameters for email selection. Gene: method of communication internal and external. Needs to have role based functionality Margie: does not understand Mike Vogt's comment that we will configure the options and enhance the email tool as we understand the needs. Group is looking for a generic solution, but Mike Vogt indicates that there are many ways of doing an email task, but they may come up with the needs for another option	Gap	Yes	Both	35
3.1.3 - Architecture / Infrastructure	The hosted solution will provide the capability for ODH to specify and modify auto archive, purging rules and schedules as it pertains to data (e.g., licenses/permits/plan review/certification) and documents (e.g. letters, reports) within the EH solution.	4	X Configuration Required	Currently parameters are set for archiving/purging to meet required specifications. Analysis and configuration would need to be added to allow an authorized user to and modify rules	MK when data is pulled out of the Live database it moves to the Archive. Rules are defined by the State. No one has ever requested Purge, but we could do this. Amanda: Problem trying to solve. Records management: Retention requirement that documents need to be purged, completely be gone after 5 years. Accountability issue for all stored records. Clermont Records Commission requires removal of data after 5-7 years. Reduce liability. Records requests, if we have the data we have to comply with the request. Gene: if the records are online, they would not have to come to the LHD to request. Backups will hold the record, but this document is not considered the property or responsibility of the LHD. Discussion as to if there is a legal requirement to complete purge data from the system. Gene: He will get a response from Legal dept	Gap	Yes	Both	35
3.2.16 - Privacy & Security	The hosted solution will have user self-service "forget user id" and "forget password" retrieval capabilities.	4	x Not Available	For security reasons this is not available. However, passwords and ids can be retrieved by permission of the PAC and HealthSpace staff members.	User can't retrieve their own password. Local Primary Admin Contact requests new passwords. Mary & Gene they would like it to be similar to when you are banking and if you forget your password, you click on forgot password, enter the email and you are given a link to reset password. Gene what about a public user? MK: Online interface at current time a password is reset manually by a program manager. Internal users work with the PAC This will have to be addressed when there is discussion on Online Portal to see if it is possible.	Gap	Yes	Both	35
3.3.3 - System Integration & Interface	The hosted solution should have the ability to interface with the USFDA and USDA systems to collect information from their Food Recall list.	2	X Customization Required	Custom data interchanges have to be built.	this is more about allowing to distribute, not that HS would interface. Gene: a way to get data in and out to Federal level and State agencies MK no one so far has interfaced with Federal. But could be done if ODH can secure a source of data.	Gap	Yes	Both	116

Appendix B

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
1.1.6 - Plan Review	The hosted solution will enable regulators to add, change or delete applicable plan review data in the system contingent on role-based criteria defined by regulator.	4	X Out of the Box	Role based features available for deletion and edits to documents	Current Roles for Ohio users have been sent to ODH. ODH to return the roles with OK or modifications requested.	Gap	Yes	ODH	24
1.2.5 - License / Permit	The hosted solution will enable authorized regulator to view, retrieve and edit all license/permit information (data fields) based on license/permit type (e.g. initial, renewal etc.) and EH Program area.	4	X Out of the Box	All documents can be viewed and role based users can edit license/permit data to keep the document current	No client to date has allowed online changing of the # of sites, more discussion will be needed on the online portal for what should be allowed or not.	Gap	Yes	ODH	25
1.2.12 - License / Permit	Enable regulator to approve license/permit only after the Ohio business rules are satisfied (i.e., after successful completion of facility inspection, sampling, etc. as required), or designate another status (e.g., Pending, Deny, etc.).	4	X Out of the Box	Ability to approve license based on business rules is currently available	Rules will be needed from ODH as to specifics. The system can manually changed to Pending, Permitted, Out of Business, Suspended, etc. Certain parts of the system have some rules in place such as you cannot generate a permit until a payment is received.	Gap	Yes	ODH	26
1.2.16 - License / Permit	The hosted solution will send an automatic e-mail confirmation of the license/permit issued or renewed to facility owner and other specified contacts on file (e.g. corporate office). If no e-mail information is available for the customer, the hosted solution will prompt and enable the regulator to generate a letter instead.	4	X Configuration Required	The system currently tracks approval and approval dates of the issued license. Email addresses are also currently entered into the owner record, allowing for the configuration of this requirement	ODH needs to determine what the format needs to be on the permit. ODH Decision needed.	Gap	Yes	ODH	27
1.2.17 - License / Permit	Enable the regulator to print license/permit before final approval.	4	X Configuration Required	Currently audit numbers are assigned as the document is printed. Configuration would be needed to allow for a print draft	ODH might want to remove the preprinted paper and should the license be able to be printed before using the security paper. ODH Decision needed to stay as is or change the current process.	Gap	Yes	ODH	28
1.3.9 - Inspection	The hosted solution will capture all inspection data (i.e., notes, text selections, electronic signatures with date and time stamp as it is saved.	4	X Out of the Box	These items are all currently available	Discussed that signatures can be captured on the local installation version. Web based signature capture is limited based on web functionality. Amanda from Clermont noted that they would like to see a signature alternative to a signature capture device due to the cost of these devices. Gene is waiting for feedback from Legal on this issue and will need further discussions.	Gap	Yes	ODH	29
1.3.12 - Inspection	The hosted solution should enable a regulator (i.e., sanitarian inspector) to upload all inspection data and other collected electronic attachments into the hosted EH DSI solution (accept in multiple formats, e.g., Word, PDF, jpg, etc.).	4	X Configuration Required	In order to preserve the ability to report, inspection information must be entered into the system using the inspection data collection form. This can be set up so that local systems can transmit data directly into the ED DSI solution. Other electronic documents can be uploaded in multiple formats.	Inspections can be uploaded into the system. Some discussions led that the prior inspections may or may not want to be imported. Some discussed that they would rather start fresh with the new system and others want to scan and attach the old inspections. HS says all of these are possible options that there should be a business role identified if the State has a preference.	Gap	Yes	ODH	30
2.1.26 - EH Portal (User Interface) Dashboard Capabilities	The hosted solution should have a dashboard work list view for various functions (e.g. inspections, plan reviews, surveys) for staff to be able to drill down into the record for edit or view.	3	X Configuration Required	This is set up to meet the department's specific needs.	HS say they have many ways to achieve the users' needs, but it can be modified to meet specific needs; confirmed that this will need configured according to those needs.	Gap	Yes	ODH	32
2.5.8 - Time Tracking/Cost Methodology	The hosted solution should have the ability to integrate with state-approved electronic payments system for the specified fee that the EH hosted solution automatically calculates based on the presiding jurisdiction and application form types including late fees. Note: The financial transaction will be processed outside of the EH DSI solution through a third party system and bank as determined by the state's accounting agreement with that third party.	4	X Customization Required	Electronic payments processes are currently available. Configuration is needed to work with the specific process within ODH	Late fees can be set up in the system. Electronic payments dealt with in separate section	Gap	Yes	ODH	33
1.1.1 - Plan Review	The hosted solution will enable customer or regulator to enter and submit application for Plan Review via EH public portal which will include the ability to upload required documents (e.g., data sheet, vicinity map, site map etc.) in multiple electronic formats including graphic software.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed	<ul style="list-style-type: none"> • Different requirements for different modules. • State to submit standard requirements, LHD's who need more info would notify customer, or have local additions to online submission. • Forms to be submitted to HS, both ODH and LHD forms needed to determine what is needed, ODH and LHD's to identify mandatory at state and local level, what is additional info but not mandatory, what will be needed to allow saving of draft, what is needed to "complete". • Some program plan reviews (eg. Pools, campground, labor camp) come first to the State for approval then to the LHD. Other programs straight to LHD (food, temp campground, sewage, well) • Attachments and scanning will need to be accepted on line with Plan review (yes, this is understood by HS) • Digital signatures on the portal for completion of plan review • Enter address/city first then if LHD is not participating in online submission, notification to be provided they cannot complete an online plan review. Program should interact with State GIS directory to help user • Date and time stamp on online submissions is required • Once online portal ready LHD's to contact users/customers 	Gap	Yes	HealthSpace	34

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
1.1.2 - Plan Review	The hosted solution will enable regulator to customize (add, delete, modify) information on standardized plan review application form, including which data fields are and attachments are required to be deemed acceptable for submittal.	4	X Customization Required	Customization required for changes to data fields captured on the Plan review	Customization will be required to allow for the fields to be collected as required by ODH. Fields will be context sensitive in that Food will have different fields from Pool, etc. These will be hard coded by HealthSpace for all districts as required by ODH.	Gap	Yes	HealthSpace	34
1.1.3 - Plan Review	The hosted solution will enable regulator to accept, or ask for more information, for the plan review; thus, assuring that the plan review is complete (i.e., holds adequate and necessary information) before the system will assign a 30-day review timeline.	4	X Out of the Box	Status field available for regulator to accept or request information on the plan review document	Solution needs more than a status field. • Errors by customer, LHD could send notifications to correct • 30 day timer clock must be stopped when the LHD sends information back to the user and restarted once user re-submits. • Questions and discussion about how amendments should work. Gene- A customer must have the ability to amend and update plan review and submit. Currently any document in the system can be sent via email by going to Actions Forward. HS will add the ability into the Online Portal to make the process better as customization required.	Gap	Yes	HealthSpace	34
1.1.7 - Plan Review	The hosted solution will capture and maintain all information specified by regulators for plan reviews with minimum of data collected on regulatory-approved plan review form. Note: Date and time stamp will be based on complete application received for tracking of approval process (ex: 30 days approval).	4	X Out of the Box	Plan review documents are currently available and have time and date stamping and can track the review from pending to approved	Online portal will auto date and time stamp the document when it is completed by the public user and submitted to the district. Should the district have a question, the regulator will have an automated way to request information back to the user via email which will stop the 30 day counter. The 30 day counter will restart when the user submitted back to the district. The time tracking is manually completed for each record that the EHS is tracking time.	Gap	Yes	HealthSpace	34
1.1.9 - Plan Review	The hosted solution will restrict data elements that customers can change on-line, as defined by ODH/LHD. Other data element changes will require approval by ODH/LHD staff before the amendments are saved.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed	• Is there a limit to how long a pending application should remain at the "shopping site"? not really a good idea to delete, maybe email reminders after a certain length of time, would the LHD look at pending requests online...processes to be determined • They will be able to pay online LHD's to set up local amounts, interaction with epay. Some LHD do not charge plan review fees, "0" fee to be set up • Portions of online documents to unlock for changes and amendments will be more difficult than unlocking a whole document. Need to discuss further if it is a requirement.	Gap	Yes	HealthSpace	34
1.5.3 - Survey	The hosted solution will capture and maintain survey schedule and assign staff survey work as determined by the authorized internal user, including cancelling and rescheduling based on user role.	4	X Customization Required	Scheduling and assignment of work is currently available, and can be a role based function	HS does not currently have survey module, but it should be similar to inspection process	Gap	Yes	HealthSpace	34
1.5.7 - Survey	The hosted solution will send automatic email survey report when completed based on trigger point (e.g. status change). The email list will be as specified by ODH and be updatable.	4	X Customization Required	A Survey module with required forms will need to be created	reports will be used to set this up once survey module is available	Gap	Yes	HealthSpace	34
1.6.6 - Complaints	When the email address was provided by the complainant, the hosted solution will automatically follow-up with an email response to the complainant with a tracking number. The response will include standard text in the body of the letter which can be customized if necessary. However, if complaint was received via telephone or in a written document, the regulator will enter the complaint manually and be able to generate a response letter with a tracking number.	4	X Customization Required	Automated emails would need to be configured for complaints.	When someone submits they get a tracking number so they can log back into the system and find status of the complaint. whole status can be tracked currently, HS will need to be able to provide the portal with information updates.	Gap	Yes	HealthSpace	34
1.7.12 - Certification	The hosted solution will enable regulators to enter a free-form text in a "Notes" section for internal reference.	4	X Out of the Box	Free form text fields are currently available in the Certification module to track additional notes	HS verified that the is not Notes section and that it will need to be added (configured) in.	Gap	Yes	HealthSpace	34
2.4.9 - Workflow Management	The hosted solution must enable regulators to "re-route" complaints manually to other program areas and/or jurisdictions (LHDs) if necessary.	4	X Out of the Box	Complaints can currently be modified to edit types and modules. The capability to move the complaint to another jurisdiction is also available	Gene wants to see record that complaint came in, but did not count towards reporting. Gene. Ability to re-route, applications, and complaints will be tied to the directory, and the process needs to be audited or tracks. Not wanting to introduce a second requirement. He sees this as two pieces of one process. So it does not get lost.	Gap	Yes	HealthSpace	34

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
1.1.8 - Plan Review	The hosted solution will maintain updatable list of pre-defined missing document list based on regulator approved criteria.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed	<ul style="list-style-type: none"> Requirements need to be determined by ODH LHDs to submit documents, then State to answer what are the requirement Applicant should be able to log in and create, edit, then submit. 30 day would not begin until all information is submitted, then assigned to the sanitarian. submit as a draft to "cart" then go back in and finish, then a notice should be given if not all complete. when submitted and complete a notice that lets them know that it is complete and they will be hearing from the Health Department. once submission is final, no more edit by customer. what will happen to lingering pending. a notice on shopping cart page, autodelete? or LHD can view even pending files on the site, and that they can notify submitters that this From the standpoint of applicant: application should not be left hanging, with the public having an that something is happening with the application. Maybe email notification after time Online submission is not mandatory, just additional convenience. They still can come into office as traditionally done. 	Gap	Yes	Both	35
1.2.11 - License / Permit	The hosted solution will have defined status markers for license/permit records in order to identify the different stages for processing of licenses and permits, as specified by ODH.	4	X Configuration Required		<ul style="list-style-type: none"> A pool facility has to go through two stages before turning over to the Local Health Dept. add to status stages. These details to be provided to HS for development In sewage and well, process is significantly different due to regulations, where the status can be tracked to specific items. Permit status will work across the board. 	Gap	Yes	Both	35
1.2.20 - License / Permit	As defined by regulators, the hosted solution will restrict data elements that a customer can change on-line after it has been submitted to the regulator. However, the solution will enable automatic changes to an approved license/permit as the regulator authorizes.	4	X Customization Required	The function will be non-editable after submission and editable after approval.	Changes to data elements restricted for the customer on line. To be determined by ODH what changes can be entered on line and what cannot.	Gap	Yes	Both	35
1.2.3 - License / Permit	The hosted solution will generate an automatic reminder e-mail or a standardized letter (for those customers lacking email ability) to facility/ owner/operator up for license/permit renewal, including generating attachments of appropriate license/permit materials based on regulator (e.g., ODH, specific LHD) specified schedules and jurisdictions. These license/permit materials are required to be sent along with the customer's renewal reminder and other supplemental documents as attachments which are based on: type of license/permit, the last two year's active license/permit population, and expiration dates.	4	X Configuration Required	Standardized Renewal applications are currently available in a printable manner. Automated emails would need to be configured	<ul style="list-style-type: none"> what if email has changed? will there be notification to the LHD? HS to develop for email "black hole". HS does not batch emailing of renewals at this time, no one has asked. Mark suggested staggered renewals Email, then paper. Add email requirement to application, and to payment portal. Also gather during inspection so that future emailing of renewals will be effective Question from participant: Should there be some type of notation when email was sent? Decision needed Mike Vogt: three options for licensee to get renewal go to secure site, where could be uploaded, email and print Question from participant: March 1st is a deadline and a letter would be sent identifying lack of payment. MK response: this is all currently part of the system (up to 4 scheduled letters to be sent for payment) Mobile license is effective state wide. payment to LHD of origin. Inspection in different HD inspection sent to originator. MK suggested a version of Temporary Vendor database where each LHD could see all inspections and permits. Decision needed 	Gap	Yes	Both	35
1.5.12 - Survey	The hosted solution will automatically check that the required fields are entered before the survey can be completed, and will alert users with missing steps in-order to complete survey successfully.	4	X Customization Required	A Survey module with required forms will need to be created		Gap	Yes	Both	35
1.5.8 - Survey	Enable the ODH internal user to mark status of the survey process at different stages as specified.	4	X Customization Required	A Survey module with required forms will need to be created		Gap	Yes	Both	35
1.5.9 - Survey	The hosted solution will notify specific ODH internal users (e.g., manager, inspector) about next survey or re-survey via email, or have the ability to generate a hard copy letter for those facilities that do not have a working email address in the system.	4	X Customization Required	A Survey module with required forms will need to be created		Gap	Yes	Both	35

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
1.6.1 - Complaints	The hosted solution will accept electronic and paper complaints from the public which at a minimum must include fields specified by the regulator and a free-form text "Notes" section to explain the complaint.	4	X Customization Required	Complaints are currently available, with a minimum data set required, receiving complaints electronically requires configuration	<ul style="list-style-type: none"> Explanation: has a complaint module but no online submission of a complaint, Consider response to complaint requirements Consider required fields. ODH and LHDs take in varying amounts of detail. What level of anonymity to the complainant Notification to sanitarian. How to determine who will be assigned Decisions to be made on how to associate the complaint with particular facility across LHD borders. Some by Geocoding, possibly by website look up the complaint can be unattached or attached to a physical location, or to a facility. Discussion of complaint vs. foodborne illness complaint. More discussion needed as to when entering online is it truly a food borne illness complaint or a general complaint. checks and balance to be in place when someone is handling the complaint 	Gap	Yes	Both	35
1.8.1 - Recall	The hosted solution will enable ODH to customize and generate recall notice letter.	4	X Customization Required	There is no Recall process currently available. Analysis and development are needed	<ul style="list-style-type: none"> if any LHD has anything available as far as documents or forms get it to Margie to get to HS. Recall forms have been provided to HS. when recalls comes to ODH, ODH to put recall list on line it would kick out email to all who will want to see it. individuals at LHD facilities. Sanitarians could subscribe to a notification of recalls and they could then send this on to the licensees. Licensees could request the email notification Gene: by starting on this process it can be determined if this is the best way to communicate the information? and other options may be made available 	Gap	Yes	Both	35
1.8.2 - Recall	The hosted solution will enable ODH to send email with customized recall letter to recall distribution.	4	X Customization Required	There is no Recall process currently available. Analysis and development are needed		Gap	Yes	Both	35
1.8.3 - Recall	The hosted solution will enable ODH to publish Recall Notices on the Public EH DSI site.	4	X Customization Required	There is no Recall process currently available. Analysis and development are needed		Gap	Yes	Both	35
1.8.4 - Recall	The hosted solution will enable ODH to update or replace a specific Recall Notice list when a newer Recall Notice is issued.	4	X Customization Required	There is no Recall process currently available. Analysis and development are needed		Gap	Yes	Both	35
1.8.5 - Recall	The hosted solution will enable ODH to collect, upload, store and publish Recall Notice data from federal as formatted and published by the outside entity (e.g., FDA, CDC and USDA, etc.).	4	X Customization Required	There is no Recall process currently available. Analysis and development are needed	<ul style="list-style-type: none"> Listed as Not available. however might have been misunderstood This is NOT about the ability to direct feed into HS DSI ODH checks out FDA, USDA etc sites for recall statements. ODH chooses what to bring down from the site, might put their own edits. Then it should be available to upload and distribute out to applicable recipients. 	Gap	Yes	Both	35
1.8.6 - Recall	The hosted solution will enable the ODH to combine all Recall Notice data collected from all sources to create a master list of Recall Notice over a specified period of time.	3	X Customization Required	There is no Recall process currently available. Analysis and development are needed		Gap	Yes	Both	35
1.8.7 - Recall	The hosted solution will enable ODH to provide additional detailed information on Recall Notice for the Public viewing site.	3	X Customization Required	There is no Recall process currently available. Analysis and development are needed		Gap	Yes	Both	35
2.1.1 - EH Portal (User Interface)	The hosted solution should provide, enable electronic signatures that comply with Ohio law with applications and amendments (e.g., plan review, license/permit, certification/registration).	3	X Out of the Box	Electronic signature fields can be added to most documents	HS clarified that the end user would need to capture signatures in the field thru their hardware; also HS now has e-signature for inspections to a printable record. Waiting for clarification from ODH Legal as to what ODH can and can't do. HS can provide computerized signature capture, text only capture or no capture for paper based signing.	Gap	Yes	ODH	35
2.1.31 - EH Portal (User Interface) On-Line Application Submission	The hosted system will accept on-line, real-time entry and amendments of application forms or complaint document records requests through the EH Portal, including initial entry of application requests pending determination.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35
2.1.32 - EH Portal (User Interface) On-Line Application Submission	The hosted solution should enable specific authorized regulators to add, change or delete all data fields in any record selected contingent on role-based criteria defined by regulator with a tiered approval and management approach.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35
2.1.33 - EH Portal (User Interface) On-Line Application Submission	The hosted solution will automatically generate a ID number for license/permit, certification/registration, etc. based on type of application received through the EH Portal application submission process.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35
2.1.34 - EH Portal (User Interface) On-Line Application Submission	The hosted solution will use the ID number to link attachments submitted by mail to electronic application request.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
2.1.35 - EH Portal (User Interface) On-Line Application Submission	The hosted solution will automatically notify the submitter of invalid web application entries and which field(s) caused the edit to fail.	3	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35
2.1.9 - EH Portal (User Interface)	The hosted solution non-secure site (general public) should have flexible configuration abilities to allow ODH to add, change or delete content information (e.g. policies, bulletins, notifications) and links to the pages (e.g. Reporting Tools, other ODH EH web systems).	4	X Customization Required	This requires and client editable web site which is not available as a standard feature.	<ul style="list-style-type: none"> What kinds of sites and links would be hosted from our site. Functionalities are available, what HS need are details. Gene: envisioning better communication to customers ability to post things like are program wide; eg policy changes, variances, director's letter, and there would be a location that affected users would see. The important thing is to communicate information to individuals. similar to share point? they will go in and they can see various references and links. An LHD would see things that Customer would not. what level of changes could be done by the user. A program manager should be able to upload to applicable program on site, there would be level of review and then posted Question how would userslink to it? our site their local site ODH site? Many options are available Dwayne, from Warren said he wants link right on his local website There would be a portal for general and for internal 	Gap	Yes	Both	35
2.2.24 - Reporting & Inquiry - Geographic Information System (GIS)	The EH DSI solution must collect longitude and latitude data for all program areas, based on address entered. The solution must store these values in a format conducive for GIS mapping.	4	X Out of the Box	Global position on the Physical Location document is currently available.	More discussion needed between HS and ODH for the ODH tool to collect the GPS coordinates from an address.	Gap	Yes	Both	35
2.2.25 - Reporting & Inquiry - Geographic Information System (GIS)	The GIS functionality must correlate and determine the correct jurisdiction assigned by ODH using the LHD directory data which is an ODH internal application.	4	X Customization Required	GIS information is collected in the system. Interfaces are produced to uses with existing GIS systems.	Gene: When public enters address for application or complaint Health District can be found. MK: Resource from State that will find address. Mark: ODH to maintain list and provide HS an export when it is updated.	Gap	Yes	Both	35
2.2.30 - Reporting & Inquiry - Geographic Information System (GIS)	The hosted solution's GIS browser should have the capability to be linked to all EH Programs implemented and accessible through the EH Portal.	4	X Customization Required	Data interchanges or interfaces can be programmed into the system to meet this requirement.	See 2.2.29	Gap	Yes	Both	35
2.3.1 - Electronic Payments and Accounting	The hosted solution should have the ability to integrate with state-approved electronic payments system for the specified fee that the EH hosted solution automatically calculates based on the presiding jurisdiction and application form types including late fees. Note: The financial transaction will be processed outside of the EH DSI solution through a third party system and bank as determined by the state's accounting agreement with that third party.	4	X Configuration Required	Electronic payments processes are currently available. Configuration is needed to work with the specific process within ODH	Intro by MK all payments paid through portal and reconciliations reports will be created Donica: two projects C-Boss and then when payment posted, payment is split monies directly deposited in correct accounts C-Boss will need information from LHD's about any account information and ODH will require this info asap. Gene: Plan, not official yet: ODH to cover costs for electronic transactions from C-Boss. Waiting on C-Boss for costs Margie: if ODH covers cost it should help to get the by in, for future, cannot ask public to cover transaction costs. Donica: Decision to be made if it will be required of all LHD's to use or optional	Gap	Yes	Both	35
2.4.4 - Workflow Management	The hosted solution will allow workflow of the electronically submitted applications and documents into the appropriate regulator (i.e., ODH or LHD) workflow queue. The hosted solution enables automatic notification that a new EH application or amendment to an existing record has been submitted on line and placed in the appropriate regulator queue based on jurisdiction.	4	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed	Already discussed, email notifications. Gene: when public is working in the public portal on plan review or application this should auto update the database MK we will need to understand which areas the LHD may not want to auto update	Gap	Yes	Both	35
2.4.8 - Workflow Management	The hosted solution will automatically route complaints entered from the public into the system to the appropriate jurisdiction (specific LHD) which should be based on site address of the place where the alleged violation occurred as the public entered on the complaint form.	3	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed		Gap	Yes	Both	35
2.5.2 - Time Tracking/Cost Methodology	Allow to auto populate time captured in each EH program module into Cost Methodology section by each user ID.	4	X Customization Required	Cost methodology requirements would need to be analyzed and built into the system	Gene: time tracking as entered it auto populates into cost methodology. all activities move to cost methodology to help determine LHD fees. Rules have been sent to MK for Food. If time is entered we would just need to build the calculations on a report. Margie, Pool cost methodology must be submitted to MK.	Gap	Yes	Both	35
2.5.9 - Time Tracking/Cost Methodology	The hosted solution will allow the regulators' data to automatically populate cost methodology worksheet, and allow printing on demand (as well as have standardized reports on a prescribed schedule)	4	X Customization Required	Cost methodology requirements would need to be analyzed and built into the system	Gene: Fees can be set lower than what cost methodology is set at, but not higher. Can fee amounts be edited during the fiscal year? Yes	Gap	Yes	Both	35

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
2.7.8 - Self-Service Management	The hosted solution will have the ability to generate and send mass email notices.	4	X Customization Required		We track email therefore we will be able to use this for future email requirements. System has the ability to email we need to hook up to the correct processes and meet specific Margie: understood this to be adhoc mass email. Did not have the intent to work with another specific process. MK: HS understood this as well, we would need to look at parameters for email selection. Gene: method of communication internal and external. Needs to have role based functionality Margie: does not understand Mike Vogt's comment that we will configure the options and enhance the email tool as we understand the needs. Group is looking for a generic solution, but Mike Vogt indicates that there are many ways of doing an email task, but they may come up with the needs for another option.	Gap	Yes	Both	35
3.1.3 - Architecture / Infrastructure	The hosted solution will provide the capability for ODH to specify and modify auto archive, purging rules and schedules as it pertains to data (e.g., licenses/permits/plan review/certification) and documents (e.g. letters, reports) within the EH solution.	4	X Configuration Required	Currently parameters are set for archiving/purging to meet required specifications. Analysis and configuration would need to be added to allow an authorized user to and modify rules	MK when data is pulled out of the Live database it moves to the Archive. Rules are defined by the State. No one has ever requested Purge, but we could do this. Amanda: Problem trying to solve. Records management: Retention requirement that documents need to be purged, completely be gone after 5 years. Accountability issue for all stored records. Clermont Records Commission requires removal of data after 5-7 years. Reduce liability. Records requests, if we have the data we have to comply with the request. Gene: if the records are online, they would not have to come to the LHD to request. Backups will hold the record, but this document is not considered the property or responsibility of the LHD. Discussion as to if there is a legal requirement to complete purge data from the system. Gene: He will get a response from Legal dept.	Gap	Yes	Both	35
3.2.16 - Privacy & Security	The hosted solution will have user self-service "forget user id" and "forget password" retrieval capabilities.	4	X Not Available	For security reasons this is not available. However, passwords and ids can be retrieved by permission of the PAC and HealthSpace staff members.	User can't retrieve their own password. Local Primary Admin Contact requests new passwords. Mary & Gene they would like it to be similar to when you are banking and if you forget your password, you click on forgot password, enter the email and you are given a link to reset password. Gene what about a public user? MK: Online interface at current time a password is reset manually by a program manager. Internal users work with the PAC This will have to be addressed when there is discussion on Online Portal to see if it is possible.	Gap	Yes	Both	35
1.3.1 - Inspection	The hosted solution will enable customers to request an inspection.	1	X Customization Required	Once an application is received or approved the licensee can then apply for an inspection.	• Example(Pool) construction inspection; a request would go to the queue, • HS currently has editable inspection dates for facilities that could be used for this process. • Would Customer can make a request date, or just a queue? HS needs to know requirements. • makes most sense to have or supervisor get the email and then to schedule.	Gap	Yes	Both	35
1.3.20 - Inspection	Enable the regulator to automatically notify (email and/or generate letter) to customer, that inspection has been completed and triggered based on status change.	1	X Configuration Required	Automated notifications via email or letters would need to be configured	ODH to let HS know what processes they would want to be completed before the inspections would be emailed. HS presented 2 options to have a button "Print Inspection" as is there now to view on screen and let the system know that the inspection is ready for email. HS would advise against a simple time frame after completion or on document's first save to ensure that a partial report isn't sent.	Gap	Yes	ODH	115
1.7.13 - Certification	The hosted solution will generate a unique Level 2 Certification number and assign it to an individual Customer once the Level 2 course has been completed.	2	X Out of the Box	Unique Identifiers for Certificates and or Customers is currently available	HS verified that it will have to be coded for the Level 2s.	Gap	Yes	HealthSpace	115
1.7.4 - Certification	For Level 1 and Level 2 certifications, the hosted solution should be able to generate a receipt notification and provide it to the customer when the registration application form is submitted and payment received.	2	X Customization Required	Generation of receipts upon payment is currently available	The manual process currently does this functionality but discussions have indicated this is a two part process. This would be sent via an email in the Online Portal. For the Portal option, this would need to be customized. Receipts need to be generated for Certificates.	Gap	Yes	HealthSpace	115
2.1.25 - EH Portal (User Interface) Notifications/Alerts	The hosted solution should be able to incorporate work item routing and queuing to send on-line alerts to identified ODH/LHD staff	2	X Out of the Box	A workload balancing tool can assign and queue inspections due and schedule staff in calendar	HS Functionality available for inspection routing and queuing; ODH stated that they need the trigger alert for Plan Review also.	Gap	Yes	HealthSpace	115
2.1.36 - EH Portal (User Interface) On-Line Application Submission	The hosted solution will provide an on-line EH Portal tutorial to assist the customer in the completion of all types of application submissions to guide users through the screens they must complete.	2	X Customization Required	A Public Portal for data entry, status updates etc will need to be analyzed and developed	tutorial video or written documentation can be provided	Gap	Yes	ODH	115

Req. #	Requirement	Priority	Capability Assessment	Offeror Comments	Clarification	Fit or Gap	Work Schedule Task	Work By	Schedule Task Number (if Applicable)
1.3.11 - Inspection	The hosted solution should enable the internal user to draw electronic version of plan/layout (scale layout drawing).	2	X Customization Required	Currently drawings may be imported	<ul style="list-style-type: none"> not good quality to draw with stylus right in field in application . not as easy as using paint or easy cad and then import. Gene: How would it work? You would have to have the paint or easy cad program; create drawing, save it and import it. HS strongly suggest a paint or CAD program, more functionality. sewage, well and mobile on back put on a drawing of the mobile layout. Question from participant: A contractor will provide drawings (eg. as built) can these be uploaded? Yes. Not as much control on the web browser interface as on computer. 	Gap	Yes	Both	116
1.5.1 - Survey	The hosted solution will automatically send email reminder to appropriate ODH regulator about survey dues to be scheduled.	2	X Customization Required	Email subscriptions for reminders can be set up by the regulator once a survey module is created	<ul style="list-style-type: none"> ODH to send email reminder to LHD that survey is scheduled Process will change for admin component which ODH could do with online Reporting but sanitarian evaluations remain as scheduled site visits. Will reduce time in LHD offices 	Gap	Yes	Both	116
1.7.1 - Certification	For Level 1 and Level 2 certifications, the hosted solution should enable potential providers (i.e., customers) to submit registration application forms for certification training classes with required fields specified by ODH.	2	X Customization Required	A certification application is currently available for the internal user to enter on behalf of customers, but there is no public portal at this time	<ul style="list-style-type: none"> At some locations Level 1 is LHD, Level 2 is ODH. HS would need details as to what that means programmatically. 	Gap	Yes	Both	116
1.7.14 - Certification	The hosted solution shall enable ODH to generate a Level 2 certification card to send to individuals who have completed and passed a Level 2 certification course.	2	X Out of the Box	Generation for Certificate cards is currently available	<ul style="list-style-type: none"> ODH clarified that there needs to be a card printed rather than a certificate. HS to shrink the certificate to card size and change wording as directed by ODH after requirements received. 	Gap	Yes	Both	116
1.7.2 - Certification	For Level 1 and Level 2 certifications, the hosted solution should enable each regulator/customer to display and update the dates and times for the available training classes.	2	X Customization Required	Dates and times of training classes are currently visible and editable for internal users.	<ul style="list-style-type: none"> email blast and advertise course offering information to be provided on how to advertise who to email online application and pay features, Gene to Jean: list what is done at state and local levels and this needs to come to HS via Margie. 	Gap	Yes	Both	116
1.7.8 - Certification	The hosted solution must capture, and maintain a list of providers (with course and exam information) approved by ODH for selecting and viewing by the customers (i.e., the applicants who may be internal users, external users, or public entities).	2	X Customization Required	A provider list can be compiled and entered into the course/class. This list is viewable by the internal user, the public portal to view this will be developed		Gap	Yes	Both	116
2.1.28 - EH Portal (User Interface) Dashboard Capabilities	The Dashboard should be flexible enough to add Key Performance Indicators (KPI) information and track key relevant information on demand.	1	X Configuration Required	As previously stated.	<ul style="list-style-type: none"> Gene: Need to understand the context of request- design build concept - work queue capability automated reports. example: show if they are on track for scheduling. The vision is that the data be viewable among Health Districts at three levels. example: inspection data query for state, region, local. HS will configure as they identify the KPI criteria to set up the Dashboard. 	Gap	Yes	Both	116
2.1.7 - EH Portal (User Interface)	The hosted solution user interface compliant with American Disabilities Act (ADA) guidelines.	1	X Customization Required	This is not part of the system design. However, required elements can be programmed into the system with respect to large type, voice recognition, voice to text, etc.		Gap	Yes	Both	116
2.1.8 - EH Portal (User Interface)	The hosted solution compliant with the Older Americans Act development standards for user screens.	1	X Customization Required	As previously stated.		Gap	Yes	Both	116
2.2.29 - Reporting & Inquiry - Geographic Information System (GIS)	The EH DSI solution should provide a GIS data browser that has the ability to display several data layers on the fly, including at a minimum ODH/LHD specific data and base map information, such as; aerial photography, roads, land use, soils, topography, and water bodies.	2	X Customization Required	This functionality is currently not available but could be programmed into the system.	<ul style="list-style-type: none"> Gene: want to use GIS esp sewage and wells. does not need to be in the system collected for export to another system 	Gap	Yes	Both	116
2.4.7 - Workflow Management	The hosted solution should escalate correspondence and phone contacts which have not been responded to within ODH/LHD defined timeframes to appropriate supervisory staff.	2	X Customization Required	This feature is not currently available. Analysis of ODH's needs and development would be required	<ul style="list-style-type: none"> ODH to send the workflow process for future discussion. 	Gap	Yes	Both	116
3.3.3 - System Integration & Interface	The hosted solution should have the ability to interface with the USFDA and USDA systems to collect information from their Food Recall list.	2	X Customization Required	Custom data interchanges have to be built.	<ul style="list-style-type: none"> this is more about allowing to distribute, not that HS would interface. Gene: a way to get data in and out to Federal level and State agencies MK no one so far has interfaced with Federal. But could be done if ODH can secure a source of data. 	Gap	Yes	Both	116

Appendix C

Ohio EH DSI Work Schedule - Revised November 9, 2012

ID	Task Name	Duration	Start	Finish	Predecessors	% Complete	Resource Names
1	Project initiation	88 hrs	Fri 8/10/12	Fri 8/24/12		100%	
2	✓ Kick off and formulation of project team (Deliverable 1)	5 days	Fri 8/10/12	Thu 8/16/12		100%	Project Director,Work Manager,ODH Project Manager,ODH Business Team Lead
3	✓ Confirmation of scope of work	6 days	Fri 8/17/12	Fri 8/24/12	2	100%	Project Director,Work Manager
4	Requirements affirmation, review and documentation	440 hrs	Mon 8/27/12	Fri 11/9/12		100%	
5	✓ Draft work plan and detailed project schedule (Deliverable 2)	29 days	Mon 8/27/12	Thu 10/4/12	3	100%	Work Manager,Project Director
6	✓ Project plan approval on site meeting	1 day	Fri 10/5/12	Fri 10/5/12	5	100%	Project Director,Work Manager,Configuration/Functional Lead,Technical Analyst,Tra
7	✓ Finalization of work plan (Deliverable 3 & 38)	1 day	Thu 10/4/12	Thu 10/4/12	3	100%	Work Manager,ODH Project Manager
8	✓ Requirements Affirmation meeting 1 (Deliverable 4)	1 day	Fri 10/5/12	Fri 10/5/12	7	100%	Project Director,Work Manager,Configuration/Functional Lead,ODH Project Manager
9	✓ Requirements Affirmation meeting 2 (Deliverable 4)	1 day	Wed 10/10/12	Wed 10/10/12	8	100%	Project Director,Work Manager,Configuration/Functional Lead,ODH Project Manager
10	✓ Requirements Affirmation meeting 3 (Deliverable 4)	1 day	Fri 10/19/12	Fri 10/19/12	9	100%	Project Director,Work Manager,Configuration/Functional Lead,ODH Project Manager
11	✓ Requirements Affirmation meeting 4 (Deliverable 4)	1 day	Thu 11/1/12	Thu 11/1/12	10	100%	Project Director,Work Manager,Technical Leads,Configuration/Functional Lead,Trair
12	✓ Technical Environment Document (Fit-Gap Analysis results) (Deliverable 5)	5 days	Mon 11/5/12	Fri 11/9/12	11	100%	Project Director,Work Manager,Configuration/Functional Lead
13	✓ Business Continuity, Backup/Disaster Recovery plans (Deliverables 30 & 31)	5 days	Mon 10/22/12	Fri 10/26/12	10	100%	Project Director
14	User configuration system design	248 hrs	Fri 10/5/12	Mon 11/19/12		45%	
15	User Configuration Management Plan (Deliverable 6)	2 days	Tue 11/13/12	Wed 11/14/12	12	0%	Training Lead,Work Manager
16	Develop data capture parameters and output	5 days	Tue 11/13/12	Mon 11/19/12	12	0%	Work Manager,Functional Expert,ODH Project Manager,ODH SMEs
17	✓ ODH deliver to HS copies of all forms/policies for Pool, Camp and Food Modules	10 days	Fri 10/5/12	Thu 10/18/12	7	100%	ODH SMEs,ODH Project Manager
18	Violation Entry	280 hrs	Wed 12/19/12	Thu 2/14/13		0%	
19	Pool Module Sections, Violations, Corrective Actions entered	5 days	Wed 12/19/12	Thu 1/3/13	35	0%	ODH Pool SMEs
20	Campground Module Sections, Violations, Corrective Actions entered	5 days	Fri 1/4/13	Thu 1/10/13	19	0%	ODH Camp SMEs
21	Labor Camp Module Sections, Violations, Corrective Actions entered	5 days	Fri 1/11/13	Thu 1/17/13	20	0%	ODH Labor Camp SMEs
22	Food Module Sections, Violations, Corrective Actions entered	20 days	Fri 1/18/13	Thu 2/14/13	21	0%	ODH Food SMEs
23	Initial Setup of the system	288 hrs	Tue 11/13/12	Tue 1/15/13		0%	
24	1.1.6 Plans Review - ODH of confirmation of roles	15 days	Tue 11/13/12	Thu 12/6/12	12	0%	ODH Project Manager,ODH Work Manager,ODH Technical Lead,ODH Business Team Lead
25	1.1.5 License/Permit - ODH Clarification	15 days	Tue 11/13/12	Thu 12/6/12	12	0%	ODH Work Manager,ODH Technical Lead,ODH Business Team Lead
26	1.2.12 License Permit - Specific rules need to be established	15 days	Tue 11/13/12	Thu 12/6/12	12	0%	ODH Work Manager,ODH Business Team Lead,ODH SMEs
27	1.2.16 Licensed/Permit - ODH decision on permit format	15 days	Tue 11/13/12	Thu 12/6/12	12	0%	ODH Project Manager,ODH Work Manager,ODH Business Team Lead,ODH SMEs
28	1.2.17 License/Permit - ODH decision on pre-printed paper	15 days	Tue 11/13/12	Thu 12/6/12	12	0%	ODH Project Manager,ODH Work Manager,ODH Business Team Lead
29	1.3.9 Inspection - ODH decision on legal requirements of online signature	15 days	Tue 11/13/12	Thu 12/6/12	12	0%	ODH Project Manager,ODH Work Manager,ODH Technical Lead,ODH Business Team Lead
30	1.3.12 Inspection - ODH decision on rules regarding old inspections	15 days	Tue 11/13/12	Thu 12/6/12	12	0%	ODH Project Manager,ODH Technical Lead,ODH Business Team Lead,ODH SMEs
31	2.1.1 EH Portal (user interface) - Clarification of ODH legal environment	15 days	Tue 11/13/12	Thu 12/6/12	12	0%	ODH Project Manager,ODH Work Manager,ODH Business Team Lead
32	2.1.26 EH Portal (user interface) Dashboard Capabilities - ODH clarification on needs	15 days	Tue 11/13/12	Thu 12/6/12	12	0%	ODH Project Manager,ODH Work Manager,ODH Business Team Lead
33	2.5.8 Time Tracking/Cost Methodology - ODH decision on late fees	15 days	Tue 11/13/12	Thu 12/6/12	12	0%	ODH Project Manager,ODH Work Manager,ODH Business Team Lead
34	Update design and development documentation (Deliverable 7)	3 days	Fri 12/7/12	Tue 12/11/12	24,33	0%	Configuration/Functional Lead,Developer,Functional Expert
35	Finalize design and function of the system with Department staff	5 days	Wed 12/12/12	Tue 12/18/12	34	0%	Work Manager,ODH Project Manager,ODH Pool SMEs,ODH Camp SMEs,ODH Lab

Ohio EH DSI Work Schedule - Revised November 9, 2012

ID	Task Name	Duration	Start	Finish	Predecessors	% Complete	Resource Names
36	Set up of support forum for users	1 day	Tue 11/13/12	Tue 11/13/12	12	0%	Technical Leads
37	Modify user guides to match specific characteristics of system (User Manual)	4 days	Wed 12/19/12	Wed 1/2/13	35	0%	Training Lead,Documentation Specialist
38	Modify existing training manual, system manuals to reflect specific characteristics of the system (Training Plan)	4 days	Wed 12/19/12	Wed 1/2/13	35	0%	Training Lead,Documentation Specialist
39	Development of a historical data conversion plan and tools (Deliverable 13, 14 & 15)	10 days	Wed 12/19/12	Thu 1/10/13	35	0%	Configuration/Functional Lead
40	ODH Approval of system design	3 days	Fri 1/11/13	Tue 1/15/13	39	0%	Project Director,Work Manager,ODH Project Manager,ODH Business Team Lead
41	System Development	400 hrs	Tue 11/20/12	Mon 2/11/13		0%	
42	Module development, reporting requirements, network and hardware assessment - all phases (Deliverable 8)	5 wks	Tue 11/20/12	Mon 1/7/13	16	0%	Configuration/Functional Lead,Technical Leads,Developer,ODH Business Team Lead
43	Development of payment interface	5 days	Tue 1/8/13	Mon 1/14/13	42	0%	Configuration/Functional Lead,Technical Leads,Developer,ODH Technical Lead
44	Setup by State of payment interface to financial system	4 wks	Tue 1/15/13	Mon 2/11/13	43	0%	ODH Project Manager,ODH Technical Lead,ODH Business Team Lead
45	Development of system performance measurement methodology	5 days	Wed 12/19/12	Thu 1/3/13	35	0%	Work Manager,Configuration/Functional Lead,Technical Leads,ODH Project Manager
46	System Test Documentation (Deliverable 9)	1 day	Fri 1/11/13	Fri 1/11/13	47	0%	Training Lead
47	ODH Approval of module development (Deliverable 12)	3 days	Tue 1/8/13	Thu 1/10/13	42	0%	Project Director,Work Manager,ODH Project Manager,ODH Business Team Lead
48	Set up testing and training data bases	2 days	Tue 1/8/13	Wed 1/9/13	42	0%	Configuration/Functional Lead
49	Certification of State and federal HIPAA guideline compliance (Deliverable 11)	1 day	Fri 1/4/13	Fri 1/4/13	45	0%	Technical Leads
50	Data Import	136 hrs	Fri 1/11/13	Mon 2/4/13		0%	
51	Finalize and test data import tools (Deliverables 16, 17 & 18)	10 days	Fri 1/11/13	Thu 1/24/13	47	0%	Configuration/Functional Lead,Technical Leads,ODH Technical Lead,ODH Business
52	Import data for Phase 1 deployment	5 days	Fri 1/25/13	Thu 1/31/13	51	0%	Technical Leads,ODH Technical Lead
53	Test data exchange	2 days	Fri 2/1/13	Mon 2/4/13	52	0%	Configuration/Functional Lead,Technical Leads,ODH Technical Lead
54	Training and user manuals	144 hrs	Wed 12/19/12	Tue 1/22/13		0%	
55	Development of training plan and curriculum (Deliverables 19, 20 & 21)	10 days	Thu 1/3/13	Wed 1/16/13	38	0%	ODH Project Manager,Training Lead,ODH Business Team Lead
56	Finalization of training materials (Deliverables 10, 23)	10 days	Wed 12/19/12	Thu 1/10/13	35	0%	Training Lead,Documentation Specialist,ODH Project Manager
57	Completion of Training Delivery (Deliverable 22)	3 days	Fri 1/11/13	Tue 1/15/13	56	0%	ODH Work Manager
58	Development and approval of training schedule	5 days	Wed 1/16/13	Tue 1/22/13	57	0%	Work Manager,Configuration/Functional Lead
59	User acceptance test (UAT)	272 hrs	Thu 1/10/13	Wed 2/27/13		0%	
60	UAT Test Plan (Deliverable 24)	5 days	Thu 1/10/13	Wed 1/16/13	48	0%	Configuration/Functional Lead,Technical Leads,Training Lead
61	Deployment of test system for Phase 1 (Deliverable 25)	1 day	Tue 2/5/13	Tue 2/5/13	53	0%	Technical Leads,Developer,Technical Analyst
62	Record performance deficiencies (Deliverable 27)	5 days	Wed 2/6/13	Tue 2/12/13	61	0%	Functional Expert,Configuration/Functional Lead,ODH Pool SMEs
63	Deployment of bug fixes	5 days	Wed 2/13/13	Wed 2/20/13	62	0%	Technical Leads,Developer
64	Modification of system to meet business requirements defined in Phase 1 UAT	5 days	Thu 2/21/13	Wed 2/27/13	63	0%	Technical Leads,Configuration/Functional Lead
65	Finalization of security protocol	2 days	Wed 2/6/13	Thu 2/7/13	61	0%	Work Manager,Technical Analyst,ODH Project Manager,ODH Technical Lead,ODH I
66	ODH acceptance of modules (Deliverables 26 & 28)	2 days	Fri 2/8/13	Mon 2/11/13	65	0%	Project Director,Work Manager,ODH Project Manager,ODH Work Manager
67	Integration Testing Results	48 hrs	Thu 2/21/13	Thu 2/28/13		0%	
68	Identification of integration requirements with other systems	1 day	Thu 2/21/13	Thu 2/21/13	63	0%	Configuration/Functional Lead,Technical Analyst,ODH Project Manager,ODH Techni
69	Development of system interfaces	5 days	Fri 2/22/13	Thu 2/28/13	68	0%	Technical Leads,Technical Analyst,ODH Technical Lead
70	Certifications	120 hrs	Wed 1/23/13	Tue 2/12/13		0%	

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ID	Task Name	Duration	Start	Finish	Predecessors	% Complete	Resource Names
71	System training via e-learning and onsite on infrastructure, platform for Department staff	2 wks	Wed 1/23/13	Tue 2/5/13	54	0%	Training Lead,ODH Business Team Lead
72	Implementation of train-the trainers of Department staff including live classroom training and supervision	1 wk	Wed 2/6/13	Tue 2/12/13	71	0%	Training Lead,ODH Business Team Lead
73	Deployment Plan	154.67 hrs	Tue 2/12/13	Tue 3/12/13		0%	
74	Finalization of rollout plan (Deliverable 29)	2 days	Tue 2/12/13	Wed 2/13/13	66	0%	Work Manager,ODH Project Manager,Training Lead
75	Coordination of system rollout with Department staff	3 days	Thu 2/14/13	Fri 2/22/13	74	0%	Work Manager,ODH Project Manager,Training Lead
76	Consensus on the deployment process between ODH project managers and HealthSpace	1 day	Fri 2/22/13	Mon 2/25/13	75	0%	Work Manager,ODH Project Manager
77	Deployment of Phase 1 system based on the implementation process	8 days	Mon 2/25/13	Fri 3/8/13	76	0%	Technical Leads,Work Manager,ODH Project Manager
78	Post-implementation Support Plan (Deliverable 34)	2 days	Fri 3/8/13	Tue 3/12/13	77	0%	Work Manager
79	Acceptance of Phase 1	104 hrs	Fri 3/8/13	Wed 3/27/13		0%	
80	Monitor the performance of the system	2 wks	Tue 3/12/13	Tue 3/26/13	78	0%	Help Desk Manager
81	ODH Approval of Phase 1	1 day	Tue 3/26/13	Wed 3/27/13	80	0%	Project Director,Work Manager,ODH Project Manager,ODH Business Team Lead
82	Provide onsite support as and when needed	2 wks	Fri 3/8/13	Fri 3/22/13	77	0%	Work Manager,Jr. Business Analyst
83	Phase 2 set up	72 hrs	Wed 3/27/13	Tue 4/9/13		0%	
84	Deployment of test system for Phase 2	1 day	Wed 3/27/13	Thu 3/28/13	81	0%	Technical Leads,Developer,Technical Analyst,ODH Technical Lead
85	Record performance deficiencies	5 days	Thu 3/28/13	Thu 4/4/13	84	0%	Functional Expert,Configuration/Functional Lead,ODH Camp SMEs,ODH Labor Carr
86	Deployment of bug fixes	3 days	Thu 4/4/13	Tue 4/9/13	85	0%	Technical Leads,Developer
87	Modification of system to meet business requirements defined for Phase 2	2 days	Thu 4/4/13	Mon 4/8/13	85	0%	Technical Leads,Configuration/Functional Lead
88	Modify user guides to match specific characteristics of system (User Manual)	1 day	Mon 4/8/13	Tue 4/9/13	87	0%	Training Lead,Functional Expert
89	Deployment of Phase 2	80 hrs	Tue 4/9/13	Tue 4/23/13		0%	
90	Coordination of Phase 2 rollout with Department Staff	2 days	Tue 4/9/13	Thu 4/11/13	83	0%	Work Manager,ODH Project Manager
91	Deployment Phase 2 based on implementation process	5 days	Thu 4/11/13	Thu 4/18/13	90	0%	Technical Leads,Work Manager,ODH Project Manager,ODH Technical Lead
92	System training via e-learning and onsite on infrastructure, platform for Department staff	2 wks	Tue 4/9/13	Tue 4/23/13	83	0%	Training Lead
93	Implementation of train-the trainers of Department staff including live classroom training and supervision	2 wks	Tue 4/9/13	Tue 4/23/13	83	0%	Training Lead
94	Acceptance of Phase 2	88 hrs	Thu 4/18/13	Fri 5/3/13		0%	
95	Monitor the performance of the system	2 wks	Thu 4/18/13	Thu 5/2/13	91	0%	Help Desk Manager
96	ODH Approval of Phase 2	1 day	Thu 5/2/13	Fri 5/3/13	95	0%	Project Director,Work Manager,ODH Project Manager,ODH Business Team Lead
97	Provide onsite support as and when needed	2 wks	Thu 4/18/13	Thu 5/2/13	91	0%	Work Manager,Jr. Business Analyst
98	Phase 3 set up	40 hrs	Fri 5/3/13	Fri 5/10/13		0%	
99	Deployment of test system for Phase 3	1 day	Fri 5/3/13	Mon 5/6/13	96	0%	Technical Leads,Developer,Technical Analyst
100	Record performance deficiencies	2 days	Mon 5/6/13	Wed 5/8/13	99	0%	Functional Expert,Configuration/Functional Lead,ODH Food SMEs
101	Deployment of bug fixes	2 days	Wed 5/8/13	Fri 5/10/13	100	0%	Technical Leads,Developer
102	Modification of system to meet business requirements defined for Phase 3	2 days	Fri 5/3/13	Tue 5/7/13	96	0%	Technical Leads,Configuration/Functional Lead
103	Modify user guides to match specific characteristics of system (User Manual)	3 days	Fri 5/3/13	Wed 5/8/13	96	0%	Training Lead,Functional Expert,ODH SMEs
104	Deployment of Phase 3	80 hrs	Fri 5/3/13	Fri 5/17/13		0%	
105	Coordination of Phase 3 rollout with Department Staff	2 days	Fri 5/3/13	Tue 5/7/13	96	0%	Work Manager,ODH Project Manager

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106	Deployment Phase 3 based on implementation process	5 days	Fri 5/10/13	Fri 5/17/13	101	0%	Technical Leads,Work Manager,ODH Project Manager,ODH Technical Lead
107	System training via e-learning and onsite on infrastructure, platform for Department staff	2 wks	Fri 5/3/13	Fri 5/17/13	96	0%	Training Lead
108	Implementation of train-the trainers of Department staff including live classroom training and supervision	2 wks	Fri 5/3/13	Fri 5/17/13	96	0%	Training Lead
109	Acceptance of Phase 3	96 hrs	Fri 5/17/13	Wed 6/5/13		0%	
110	Monitor the performance of the system	2 wks	Fri 5/17/13	Mon 6/3/13	106	0%	Help Desk Manager
111	ODH Approval of Phase 3 (Deliverable 32)	1 day	Mon 6/3/13	Tue 6/4/13	110	0%	Project Director,Work Manager,ODH Project Manager,ODH Business Team Lead
112	Provide onsite support as and when needed	2 wks	Fri 5/17/13	Mon 6/3/13	106	0%	Work Manager,Technical Leads
113	Provide final digital copies of all files, documents and other work artifacts (Deliverable 33)	1 day	Tue 6/4/13	Wed 6/5/13	111	0%	Work Manager,Configuration/Functional Lead,Technical Leads
114	System Enhancement	240 hrs	Tue 6/4/13	Tue 7/16/13		0%	
115	Review of Priority 1 and 2 elements with Department Staff	5 days	Tue 6/4/13	Tue 6/11/13	111	0%	Project Director,Work Manager,Configuration/Functional Lead,ODH Project Manager
116	Finalize design and function of Priority 1 and 2 elements	5 days	Tue 6/11/13	Tue 6/18/13	115	0%	Work Manager,Configuration/Functional Lead,ODH Work Manager,ODH Business T
117	Development of enhanced elements	10 days	Tue 6/18/13	Tue 7/2/13	116	0%	Work Manager,Configuration/Functional Lead,Technical Leads
118	Enhanced testing	5 days	Tue 7/2/13	Tue 7/9/13	117	0%	Technical Leads,ODH Technical Lead,ODH SMEs
119	Deployment of enhanced elements	5 days	Tue 7/9/13	Tue 7/16/13	118	0%	Work Manager,Configuration/Functional Lead,Technical Leads,Training Lead,ODH T
120	System Monitoring and Tweaking	640 hrs	Tue 3/12/13	Tue 7/2/13		0%	
121	Provide technical support (Deliverable 35)	16 wks	Tue 3/12/13	Tue 7/2/13	77	0%	Help Desk Manager
122	Implement bug fixes and system modification as required (Deliverables 36, 37 & 38)	4 wks	Tue 6/4/13	Tue 7/2/13	111	0%	Technical Leads,Developer