Business Requirements

WFCMS-02
September 26, 2022

B1 The solution must allow users to walk a customer through questions and record answers guided by high-level business rule-driven decision support (e.g., if customer states they are working, to collect information on current employment as well as work history).

B2 The solution must allow users to capture details for eligible programs (program-specific information).

B3 The solution must provide functionality for users to capture verification of United States Citizenship and Immigration Services Form I-9, Employment Eligibility Verification of:

- Identity (documentation of proof of identity per I-9 List A or List B), and
- Legal authorization to work of all paid employees in the United States (documentation of proof of identity per I-9 List A or List C).

B4 The solution must provide the ability for users for the electronic capture, storage, and retrieval of eligibility documents.

B5 The solution must include the ability for users to determine program eligibility based on business rules including:

- Capturing data required for determining program eligibility;
- Determining service funding; and
- Providing ability to indicate services from one or more funding sources.

B6 The solution must allow users to perform group eligibility including, but not limited to, recording eligibility of dislocated workers for Trade Adjustment Assistance (TAA). For example, a group of workers is determined eligible for TAA because their jobs are lost or threatened due to trade-related circumstances as determined by the DOL investigation.

B7 The solution must include the ability for the users to add and collect customer goals and service planning. This should be a data field process with users selecting services to be provided with planned provision dates and then the ability to track and show if/when the services were actually provided. If provided late, why. If not provided at all/canceled, then when, why, and by whom.

B8 The solution must provide the ability for users to identify potential TWC or other agency programs that may be appropriate for the customer.

B9 The solution must include the ability to add and collect test information for participants: Baseline—Pre-test and Progress—Post-test.

B10 The Offeror must describe how the WF CMS will track services provided to and outcomes achieved by customers including:

- Assessments
- Direct Contact Hours Proxy Contact Hours
- Workforce Training Hours
- Workforce Training Services
- Career Services
- Supportive Services
- Planned Gaps in Service (with reason codes, notes, and planned return dates)
- Follow-up Services
- All allowable Measurable Skill Gains under WIOA (except the collection of Carnegie Units, which are not used in Texas) including, but not limited to, the ability to upload source documentation:
    - Educational functioning level gain
    - Achievement of a high school diploma or equivalent

    - Transcript or Report cards
    - Progress Milestones
    - Skill Progression
- Transition to postsecondary education
- Post-Exit Employment and Earnings where UI Wage records are not available (such as if the customer moves into self-employment)
- Credential Achievement

B11 The solution must include the ability to record and track:

- Concurrent enrollment through Integrated Education and Training (IET)
- Concurrent enrollment that is not a part of an IET

B12 The solution must have the ability for a user for one program to refer a customer for services at any point in case management to another TWC program without duplicate entry and without having to re-enter their logon credentials.

B13 The solution must allow the user to collect and apply program and employer data including: Company name, physical address, website, phone, Federal Employer Identification Number (FEIN), Company contact name, title, email address and direct phone number, Note Title and note and Business Service.

B14 The solution must allow users to select values for some data fields (e.g., drop-down list, radio buttons, check boxes). For example, a drop-down list for Employer Type may contain education, federal government, state government, local government, private sector, not-for-profit, staffing, and other values.

B15 The solution must interface with VOS (WIT) to facilitate use of VOS functionality on customers who are primarily being served through programs tracked in the WF CMS.

B16 The solution must record, track, and monitor a customer's employment information for one concurrent or consecutive employment including ability to search for occupation code and title through appropriate resources and capture applicable work activity.

B17 The solution must have the capability to record event or activity participation outcomes (e.g., positive or negative).

B18 The solution must provide the capability for services to be flagged as participatory or reportable and to have services added or existing service characteristics (e.g., participatory vs. reportable) updated by appropriate staff

B19 The solution must allow the Case Manager to plan and track pre-employment activities such as participation in a vocational (or prevocational) activity like volunteer work, paid work experience, seminar or workshop, or vocational class.

B20 The solution must allow users to enter one (1) or more services to a select group of customers with one transaction.

B21 The solution will provide access to reference materials for services (e.g., Service Matrix) when users are entering services in a single customer record or multiple customer records.

B22 The solution must track the flow of customers through their training including collecting, aggregating, and reporting: the type of training, training institution, anticipated training start and end dates, actual dates of training attendance, planned credential attainment, actual credential attainment and attainment date, aggregation of credit hours, and completion of training confirmed.

B23 The solution must accommodate the Worker Adjustment and Retraining Notification (WARN) program and its use by Rapid Responders.

B24 The solution must track and update prospective Exit Dates as occurring on the 91st day following the date of the last Participatory Service in the absence of a validly entered "planned gap in service."

B25 The solution must collect exit codes and exclusionary exit codes (separate codes for exclusions that remove customers from performance reporting) within program area specified time frames.

B26 The solution must have the ability for users to record and track all allowable Measurable Skill Gains under WIOA (except the collection of Carnegie Units, which are not used in Texas) including the ability to upload source documentation:

- Educational functioning level gain
- Achievement of a high school diploma or equivalent
- Transcript or Report cards
- Progress Milestones
- Skill Progression

B27 The solution must include the ability to record and track achievement of Secondary and postsecondary Credentials, including Licensures and Certificates within program-area specified time frames.

B28 The solution must include the ability to add and collect training Information and associate training with participant and classes:

- Date entered/exited training
- Type of training
- Program of Study
- Classification of Instructional Programs (CIP)
- CIP Code

- Occupational Skills Training Code
- Completed or Withdrew

B29 The solution must have the ability for staff to record whether any of the employment in Q2 Post-Exit is related to the training.

B30 The solution must include the ability to collect and add student credential information such as type, date issued, issued by, and other relevant details.

B31 The solution must record and monitor Post-Exit enrollment in training and education (used for federal and state reporting).

B32 The WF CMS must interface with Texas wage records to identify employment and earnings for each of the four (4) calendar quarters Post-Exit. The WF CMS may interface with State Wage Record Interchange System (SWIS) records but must maintain that data in a separate table with access highly limited to DOI and IT staff and not appearing on any screen or report.

B33 The solution must allow users to record Supplemental Employment/Wage Records (SEWRs) during participation and for each of the four (4) calendar quarters Post-Exit. The solution must have a mechanism to ensure that SEWRs are not double counted by requiring users to identify the type of employer and identifying information – including FEIN or Texas tax ID.

B34 The solution must provide budget functionality, such as the ability to plan, allocate budget by program and funding source, to any organizational level including case, distribute, report, control such as separation of duties and monitor budgets.

B35 The solution budget functionality will be based on defined configurable business rules, expenditure categorization, reporting requirements, and internal controls such as separation of duties and ensure compliance with division, agency, state, and federal requirements.

B36 The solution must have the ability for users to track training and supportive service expenditures at the per person level with planned and actual expenditures. The actual expenditures per person should be included in PIRL and will be used to meet federal reporting requirements.

B37 The solution must provide a budget transaction log and audit report.

B38 The solution must incorporate a staff management model that ties staff to specific Board contractors as required under WIOA §116. The solution must also facilitate evaluation of Board contractors across the Boards they operate in as required under WIOA §116.

B39 The solution must provide a method for identifying, monitoring, and tracking (transaction history or log of services provided and by whom) for Case Manager and in-house service provider staff (i.e., staff exit, staff move, etc.). This is critical to evaluating performance.

B40 The solution must provide holistic, seamless views of any customer across TWC programs and services, based on available data, the operator's user role, and applicable business rule such as Personally Identifiable Information (PII).

B41 The solution must [applying Role-Based Access Control (RBAC), security and privacy requirements] allow designated local area users to store dynamic data unique to their area, as related to state business rules, to support local service delivery (e.g., different redetermination periods; create a list of customer needs that are specific to their area by program, by office, and in some cases by contractor; setup local Board reports grouping to meet specific local needs).

B42 The solution must allow designated local area users the ability to update relational data for the areas they serve. For example, TWC needs the flexibility to add, maintain, and inactivate Grantees statewide, as well as allow established local Grantees control to add, maintain, and inactivate their sub-contractors (service delivery providers), when needed. Some (state discretionary) Grantees have different start times/periods, ultimately the WF CMS should have a space for them to maintain their unique data outside of the “Core” business.

B43 The solution must use USPS data for in-state addresses to populate ZIP, state, city and county filtering each respective field based on the selection or selections above it. For example, if the ZIP and state have been selected, the city drop-down list will display only values related to those selections. If the filter results in only one value, the WF CMS will populate the field with that value.

B44 The solution must allow users to record out-of-country addresses.

B45 The Offeror must describe how the solution provides the ability to receive customer assessment test outcomes (including TABE, CASAS, BEST Plus, Best Literacy, TABE CLAS-E, TxCHSE, WorkKeys, and Prove It), and identify the assessment tools that are supported out of the box and identify the process by which states can add additional assessment tools.

B46 The solution must have the capability to display configurable broadcast messages or banners that can be targeted for specific areas, program, groups of users or individual user.

B47 The Offeror must describe the solution’s business rule approach that will be used such as capturing, testing, publishing, automating, and changing rules.

B48 The Offeror must describe the tools that will be used in which business rules are separated, logically and perhaps physically, from other aspects of the WF CMS and shared across data stores, user interfaces, and applications.

B49 The solution must provide a series of sequenced questions to a user guiding them using high-level business rule driven decision support based on the recorded responses to each question. For example, if it is indicated that the customer is currently working, the user would collect information on the current employment as well as the employment history.

B50 The solution must have ability to intelligently interact with people through electronic means using Artificial Intelligence (AI) to provide and contextualize intelligent results, writing responses into the appropriate fields.

B51 The solution must include tools to support decision making such evidence-based recommended actions for users to consider when serving customers.

B52 The solution must incorporate calendar functionality including ability for a user to create and edit events (e.g., date, time, place, etc.); add invitees, match with targeted audiences, send mass communications to the targeted audience, and create reminders for events, if needed. Examples:

1. A user could enter a job fair in Lubbock, target customers who are job ready desire to work in Lubbock, send them a text about the job fair, and set up a follow-up to check with the customers after the fair.

2. A user could enter training available in Seguin, target customers who could benefit from the training and live in the area, send them an email about the training, and set up a follow-up to check with the customers on their status.

B53 The solution must include processes and procedures for paper case file tracking (physical location and the contents/structure of the paper case file) for documentation that cannot be digitized or has not been digitized. For example, if a paper file is sent for an audit or court case.

B54 The solution must generate automatic case notes at designated points in the workflow based on configurable business rules such as triggers and capturing specific data for specific topics. For example, if an approver approves a service authorization, ensure the approval case notes captures information such as the decision, the approver’s name, job title, date approved, and service authorization (PO) #.

B55 The solution must provide for selective, role-based case note sharing across programs/users through the Common Layer using configurable business rules, as well as marking specific records for sharing.

B56 The solution must include the ability for users to create case notes for a single customer or multiple customers.

B57 The solution must include a method to group case notes to allow group views of “like” case notes. For example, each case note must have a standard topic and appended topic assigned.

B58 The solution will allow users to get multiple views or lists of case notes by creator’s name and topic, which enables the user to launch to a specific case note for details and provide a method to scroll through case notes like a book (previous and next page) for case reviews.

B59 The solution must include a process for case transfer (from one case manager to another), including transfer of open POs, action items, and updating the program, budget, and cost center data on outstanding SRs and SAs.

B60 The solution must provide the ability for users to generate and distribute communications via text or secure messaging application based on selective criteria that conforms to appropriate accessibility and security protocols.

B61 The solution must provide the ability for users to generate and distribute electronic communication via email based on selective criteria that conforms to appropriate accessibility and security protocols.

B62 The solution must automatically generate a log or record when communication (either text, email or written) is sent to any entity (e.g., customer(s), employers, providers, etc.) or received from other entities including template version, variable data, date distributed, and proof of receipt when applicable.

B63 The solution must provide the ability for users to generate paper correspondence for USPS or PDFs for secure transmission to an individual customer, based on configurable business rules, such as the customer’s program and case status. The correspondence will be created/updated and distributed by users or their representatives.

B64 The solution must have the ability to print correspondence as standard, large, or plain text.

B65 The solution must provide the ability for users to produce mass mailing of printed documents to selective customers, based on a set of attributes, such as such as population indicator, office, school district, LWDA, caseload, or other demographic and geographic information. This includes creating mailing labels or using a window envelope template.

B66 The solution must allow users at the state level or local level to text, email or produce printed correspondence.

B67 The solution must include the ability for communications and responses to communications to trigger other components such as referrals to other services, case notes, or actions, based on TWC business rules. For example:

- If a customer indicated in initial intake “I am interested in apprenticeship,” a trigger would create a reminder to an appropriate user to contact the customer.
- If correspondence was to obtain medical or education records, a trigger would create a reminder to follow-up if the records were not received.

B68 The solution must ensure prints generated from the solution have the option to print in standard, large, and plain text and that each of these items produce professional copy (e.g., do not run off the page, break appropriately).

B69 The solution will include correspondence template-based letters, forms, emails, and text tailored for the receiving customer or group of customers based on preferences.

B70 The proposed solution’s templates for printed letters and forms must support multiple languages — each version could have multiple types by language — configurable templates maintained by privileged users. The inclusion of Spanish is required, and Vietnamese, Mandarin and Cantonese (Chinese) are preferred.

B71 The solution must store templates and data (i.e., variable data and date specific template version) in a centralized location.

B72 The solution must provide the capability to populate template header or footer based on requirements, including logo or contacts, including those of local Boards or other Grantees.

B73 The solution will allow privileged users to fully configure — create, update, and inactive — correspondence templates with version control and history.

B74 The solution will prepopulate a template used to create correspondence to individual or multi-customers such as prepopulate the name of the customer or representative and the mailing address, city, state, and ZIP.

B75 The solution must provide the ability to add variable text to a prepopulated template used to create correspondence to individual or multi-customers where appropriate.

B76 The solution must provide ability for users to recreate correspondence using the appropriate version; if needed, have parties electronically re-sign the document; and re-transmit if email.

B77 The solution must maintain and can generate a historical record of all correspondence sent (i.e., pre-populated data at that date and time, variable data, and applicable date specific template version, etc.) in each case file.

B78 The solution must include a Customer Financial History that includes change history, so users can review the financial history throughout the life of a case.

B79 The solution must validate customer SSN or other identifying information with Social Security Administration (SSA) while protecting PII.

B80 The solution must provide a unique customer identifier (ID) that does not include any personally identifiable or sensitive information and this unique ID must be used by all solutions/programs within project scope. The customers unique ID should not contain program information or tie the customer to a program as customers can participate in more than one (1) program.

B81 The solution must accommodate customers who choose not to provide an SSN and still ensure connectivity of customer data across programs.

B82 The Offeror must propose a strategy to uniquely identify a customer across all related TWC programs (i.e., WIT, UI, Child Care, etc.) in a multi-vendor environment. For example, when searching for existing records at TWC or before adding a new case record, the WF CMS would attempt to match specified data (e.g., name, date of birth [DOB],). However, this functionality must work in the absence of an SSN by leveraging other unique identifiers, such as a driver's license number. The preference would be to use tunable probabilistic, fuzzy logic matching (e.g., IBM software) that can compare records without the benefit of SSN or other unique ID to determine the likelihood of a match existing and to assign a score. If the score is high enough, the solution could automatically accept. If not, the solution would provide a report of the records (possibly with the customer) for staff review of the records to make the determination. For example, Jim is another name for James and so if there was a record with Jim Bates with a DOB and perhaps another characteristic in common with James Bates, it is probably the same person.

B83 The solution must allow for customer identification based on a variety of demographic, geographic and other variables collected by TWC across programs (e.g., BAP, NBAP, AEL, VR, UI, etc.).

B84 The solution must capture and associate information for a guardian or other legally recognized representative to each customer.

B85 The Offeror must describe their approach to field level data quality and data integrity such as:

- completeness of data entry;
- restricting late or changed data entry to designated users and including an audit trail (so data is not deleted, it is merely flagged as deleted and won't show up in the normal application but will be in the audit trail);
- defining and applying field properties (e.g., alpha/numeric, field length);
- using predefined values (e.g., check boxes, drop-down list); and
- pre-population and filtering of options based on logical data relationships.

B86 The Offeror must describe how customer data updated in other TWC systems (e.g., WIT to CM, CM to WIT), etc.) will be applied (e.g., automatic population, staff alert and the staff-initiated population, etc.).

B87 The solution must take snapshots of specified data per state and federal regulations (i.e., eligibility, Date of Participation/Program Entry, closure).

B88 The Offeror must describe how the solution will enable ease of implementation of organizational, functional and infrastructure changes including data migration, transmission, and conversion; budget moves, and association with caseload information to reflect the changes.

B89 The solution must accommodate Public Education Information Management System (PEIMS) identifiers.

B90 The solution must have the ability to update from an external partner through an Interface and for users to track and monitor supplemental participant information such as mid participation employment information and housing status changes.

B91 The Offeror must describe how SWIS data, both direct and derived, will be restricted and applied. For example, if employment or wage amounts are identified (from the system or report), SWIS will not be the only evidence. In addition, gross earnings amount for a quarter cannot include SWIS data in user-accessible fields and must be highly restricted to a unique set of Information Innovation and Insight (I|3) and IT users.

B92 The solution must provide Case Manager a view of wage data provided through Interfaces.

B93 The solution must provide tools for interfacing, monitoring, and updating exceptions if needed for the following:

- Match data match for Employment/wage,
- Match data match for some MSG, HSE, and,
- Match data for PSE enrollment and outcomes with THECB.

B94 The Offeror must describe how the solution will allow users to interface and associate information received in the USPS mail with a case; update or digitize the documents in the electronic case file; and retrieve and view those documents with or without adaptive software. This includes but is not limited to:

- Receipt of transcripts,
- Billing information,
- Medical records,
- Contractor reports, and
- Vendor contact updates.

B95 The solution must provide the ability for all parties to sign forms or letters electronically applying business rules for signatory requirements such as under 18 customer’s guardian or representative and customer under 18 that is either married or has been emancipated by the court. This includes the ability to inactivate signature authority of an identified representative. This should include an option for remote electronic signature capability through the customer portal. The WF CMS must integrate with DocuSign or a comparable tool for electronic signatures.

B96 The Offeror must describe the options for automatically importing of test score information from a test provider that complies with TWC rules such as security and privacy.

B97 The solution must provide separate, focused, and customized on-line help at the WF CMS, function, screen, error, and field levels.

B98 The solution must provide integrated, on-line user documentation based on the role of the user, which explains the capability and functionality available to users.

B99 The Offeror must describe how customer and user feedback to the online help will be captured and updated to improve online help.

B100 The Offeror must describe the process for updating online help as improvements are identified. For example, whether updates real-time or held and released each quarter.

B101 The solution must display descriptive WF CMS warnings and error messages to help users understand the issue and possible next steps for the issue to be resolved.

B102 The solution must include links to reference documents such as TWC and Workforce Policies, Workforce Development letters, technical assistance bulletins, and other programmatic governance as applicable.

B103 The solution must provide secure messaging to communicate with customers and vendors, such as a messaging portal, to view, send and get information including:

- Viewing selected case data shared by their case worker or calendar appointment,
- Uploading and sending information such as financial, medical or training records, and

- Receiving and sending communications (e.g., email, text, etc.). Be sure to describe how this solution ensures compliance with TWC Privacy requirements (see Section 1.5.3, Data Privacy and Cyber Security).

B104 The secure messaging portal should automatically generate and process messages such as through an AI-driven communication engine that can generate and intelligently respond to written communications and integrate customer messages into the CMS data system [i.e., parse the content to accurately determine what the information is, what it communicates, and where the appropriate place in the WF CMS to record the information (beyond a communication log)].

B105 The solution must provide customizable summaries (e.g., office or Board) of functional management data including home pages, performance measure status, compliance, scheduled follow-up data and workload and dashboard indicators.

B106 The solution's navigation interface must provide flexibility and maximize workflow without impacting performance. This includes, but is not limited to:

- Default search results by operator when search pages open.
- Freeze header so it displays when scrolling through a lengthy list.
- Ability to have one or more windows with clear indication of which window the cursor is on and ability to move from one to another.
- Ability to have action list and caseload list open while working on cases.
- Ability for a system administrator to set or change default sorts for return of data.
- Allow a user to set a primary and secondary sort or filter by data element (column) using "and" and "or" functionality when selecting multiple values in a single or separate field. The user should be able to

get a list where A or B is applicable as well as a list where A AND B are applicable.

- Ability to add or hide columns on results.
- Pre-populating search data based on user defaults such as vendor search to specific ZIP or counties or distances from a specific location (search for ___________ within XX Miles of ___________).
- Pre-populating data based on the operator.

B107 The solution must include an accessible Optical Character Recognition (OCR) compliant digitized document functionality, including the ability to associate documents and data with a case. This also includes digitizing and applying data from paper forms that may have had to have been filled out during a period of WF CMS unavailability.

B108 The solution must be optimized for mobile devices (either through responsive design or mobile applications).

B109 The solution must provide the ability for a customer to locate an office by within XX miles of an address or by ZIP, city, and/or county and get contact information and directions or a map.

B110 The solution must include daily update of the office locator function on the application public facing web page to ensure up to date information such as office by ZIP, street, city, county coverage (catchment area), and/or username, is available. Note: All data must be consistent with TWC system of record for the data listed above.

B111 The solution must identify job seeker populations that are historically more likely to require more user assistance to achieve an effective outcome, based on evidence-based business rules. The WF CMS must offer such rules as a default but allow TWC to further configure them based on our own research.

B112 The solution must include the ability to identify Priority Populations such as Veterans and Foster Youth based on DOL, ED, and TWC defined business rules.

B113 The solution must include a model for identifying and tracking Period of Participation (POPs) — Date of Participation (DOP), Date of Exit (DOE) and key customer characteristics, including receiving records of services from WIT VOS and the programs in the solution to capture data for POPs and Reportable Individual Periods (RIPs) in the PIRL record. This solution would be the "system of record" and provide the foundation for improved data synchronization and more accurate reporting. The solution's POP tracking functionality must be state configurable to allow TWC to select which programs will be included in "Common" POPs (beyond just DOL programs).

B114 The solution should allow users to see all services being provide between WIT and the programs served by this solution(s).

B115 The solution must include snapshotting common-customer elements on the case record POP at the Date of Participation and prompt users to go back through the customer characteristic update/verification process if a Participant has exited and comes back later to begin a new POP.

B116 The solution must adhere and align with the TWC Records Retention Schedule, allowing for records to be purged in accordance with their legal retention period. The solution shall allow automatic purges, and the ability for records to be placed in a "hold" status, so they are not included in a purge action. The solution must meet TWC's certified Records Retention schedule.

B117 The solution must provide a user work list. For example, a list of assignments (reminders or actions) and approvals required or being tracked by a user.

B118 The solution must incorporate functionality to schedule (both real-time user and system generated assignments — actions or reminders) and alert users of upcoming or overdue assignments (actions or reminders).

B119 The solution must automatically cancel, or complete assignments (actions or reminders) based on customer, case review, purchasing or other data.

B120 The solution must allow users to cancel or complete users created assignments (actions or reminders) as per business rules.

B121 The solution must provide the ability to automatically or manually set due dates for assignments (actions or reminders) and related lead times.

B122 The solution must allow users to get multiple views, lists or reports of assignments (actions or reminders) such as by assigned to, due date, organizational area, and action type allowing the user to launch to a specific action for details and/or update based on user role access rules.

B123 The solution must provide robust search capability. The solution must search across TWC programs and its partners (e.g., HHSC, DFPS, SSI, etc.) to determine if a customer's common data is available from one of these sources. If so, it should ask if the user wants to populate/use this data for the customer. It should allow the user to update the data as needed throughout the life of the case.

B124 The solution must provide a method for users to apply "Requires Special Attention" flags (e.g., no travel, translation needed, safety concerns). These flags must be configurable by TWC.

B125 The solution must allow multiple users to work on a case at one time and clearly record who did what and when (down to the milli-second).

B126 The solution must enable users with approvals by authorized users to modify a customers' status.

B127 The solution must support case workflow and move a case from status to status based on triggers established through configurable business rules and identified during requirements sessions.

B128 The Offeror must describe if the solution provides sub-statuses when a case is in active status based on business rules including:

- Ability to search for cases in a specific sub-status.
- Ability to move status based on business rules.
- Applying the sub-status to template-based reports per business needs.

B129 The solution must provide for modifiable, on-demand template-based customers and user surveys.

B130 The solution must provide the ability to suspend a case (temporarily pause provision of services) based on business rules. The solution should allow for recording the anticipated period of suspension with reason codes and dates to allow the WF CMS to remind users when the period is scheduled to end and allow them to re-engage with the customer.

B131 The solution must create a user profile that can be updated with preferences such as colors, text size, and contrast to suit visual needs.

B132 The solution must be kept current with federal and state regulations and laws such as changes to eligibility, service delivery, data capture, and reporting.

B133 The solution must allow for capture of services related to RR and accommodate customer intake, workflow and case management functions related to RR activities.