

WIC High Level Business Requirements

Business Requirement#	Category	Source	Type	High Level Requirement	Does the proposed solution meet the requirement? (Yes, No, With Development)
				CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM	
BR-100	General	CRM	Functional	The solution shall include a Customer Relationship Management (CRM) system to consolidate client information into a single repository.	
BR-101	General	CRM	Functional	The CRM solution shall allow users to organize and access data, automate common reports, and monitor communication more effectively.	
BR-102	General	CRM	Functional	The solution shall provide a capability to pull information from wichealth.com into the CRM	
BR-103	General	CRM	Functional	There shall be triggers to the clinic staff to show completion of training by clients	
	General	CRM	Functional	The CRM shall give the clinic staff the ability to see any history of past training completed by the clients	
BR-104	General	CRM	Functional	The CRM shall grant the ability to create workflows with a possibility of manual intervention	
BR-105	General	CRM	Functional	The CRM shall allow form creation by the clinic staff	
BR-106	General	CRM	Functional	The CRM shall give the ability for the COWIC staff to create client accounts and account management	
Br-107	General	CRM	Nonfunctional	The CRM shall be able to pull information from COMPASS, in the form of database extract files (at least for the first year)	
CLIENT PORTAL					
BR-1	Login	Portal	Functional	The Client Portal shall display a login page with the following information: username, password, Remember Me on this computer, forgot password, etc.	

BR-2	Health	Portal	Functional	The Client Portal shall display a URL link to https://www.wichealth.org/ .	
BR-3	General	Compass	Functional	The Client Portal shall display the participant's name on the general information page.	
BR-4	General	Portal	Functional	The Client Portal shall allow the participant to upload a photo that will be displayed next to their name.	
BR-5	General	Portal	Functional	The Client Portal shall provide participant's dashboard	
BR-6	General	Portal	Functional	The Client Portal shall provide the participants ability to update contact info like phone number and address	
BR-7	General	Compass	Functional	The Client Portal shall display the name, date of birth, status and certification end date of the participant's children and/or mother receiving WIC benefits.	
BR-8	Appointment	Compass	Functional	The Client Portal shall provide the participants the ability to schedule and view upcoming appointments.	
				The Client Portal shall provide the participants the ability to view their appointment history.	
BR-9	Appointment	Compass	Functional	The Client Portal shall provide the participants the ability to make appointment requests through the portal with preferences for dates and times that go directly to the clinics for the creation of the appointment.(Only if participants are not able to self-manage their appointments.)	
BR-10	Appointment	Compass	Functional	The Client Portal shall provide the participants ability to view upcoming appointments.	
	Appointment	Compass	Functional	The Client Portal shall display appointment history to both the clinic staff and the clients	
BR-11	General	Compass	Functional	The Client Portal shall provide a complete list of acceptable eligibility documentation allowed for proof of address and income	
BR-12	Documentation	Compass	Functional	The Client Portal shall allow participants to upload documents for proof of address and income. (Residency; Pay - paychecks, pay stubs which can be photographs; Identification documents)	
BR-13	Documentation	Portal	Functional	The Client Portal shall allow participants to upload formula prescriptions/Physician Authorization Form (PAF) (directly from the doctor's office)	
				The Client Portal shall allow the participants to see when a new prescription is due	

BR-14	Integration	Portal	Non - Functional	The client portal shall be able to Integrate with Compass to eliminate the need for staff to bounce between multiple systems (least 2 system)	
BR-15	Report	Portal	Functional	The client portal shall allow staff to pull data from the tool into easy-to-read and easy-to-share reports (what type of reports?).	
BR-16	General	Portal	Functional	The client portal shall allow staff to edit content easily.	
BR-18	Appointment	Portal	Functional	The client portal shall allow staff to complete telehealth visits	
BR-20	Benefits	EBT/J PMA	Functional	The Client Portal shall display a real-time food balance that is consistent with the balance reflected in other applications i.e. Show amount of formula and food the participants have obtained and remaining balance.	
BR-21	Benefits	Compass	Functional	The Client Portal shall display the WIC dollar amount redeemed to date for a time frame determined by CDPHE.	
BR-22	Benefits	Compass	Functional	The Client Portal shall display a representation of the WIC dollar available based on the family profile.	
BR-23	Health	Compass	Functional	The Client Portal shall include the participant's child growth chart with measurements.	
BR-24	Health	Compass	Functional	The Client Portal shall list the complete lesson history completed within WIC Health.org.	
BR-25	Health	Compass	Functional	The Client Portal shall list the next lesson (accessing personalized educational content) that needs to be completed within WIC Health.org along with the date it needs to be completed in order to have the participant's card reloaded.	
BR-26	Shopping	Compass	Functional	The Client Portal shall display current and historic WIC Nutritional prescription information.	
BR-27	General	Compass	Functional	The Client Portal shall display the list of goals that were established during the participant's visit and/or WIC recommendations	
BR-28	General	Portal	Functional	The participant shall be able to journal their personal milestones within the Client Portal.	
BR-29	Appointment	Compass	Functional	The Client Portal shall display the date of each participant's next appointment within the family. If the next appointment is not scheduled, the Client Portal shall display the date of the participant's last appointment and the time frame of when the next appointment should be scheduled.	

BR-30	Appointment	Compass	Functional	The participant shall request an appointment through the Client Portal that is routed to the participants preferred clinic for staff processing.	
BR-31	Health	Compass	Functional	The Client Portal shall display all hemoglobin records for each participant within the family.	
BR-32	Health	Compass	Functional	The Client Portal shall allow participants to upload anthropometric records (i.e., weights, heights, hemoglobin/hematocrit) data from a doctor's appointment by uploading a screenshot or copy of the information from the doctor.	
BR-33	Health	Compass	Functional	The Client Portal shall allow participants to view their anthropometric data (heights, weights, hemoglobin)	
BR-34	General	Compass	Functional	The Client Portal shall allow participants to view their current certification status (i.e., enrolled, enrollment pending, ineligible)	
BR-35	Compliance	Portal	Non -Functional	The Client Portal's text and functions comply with the Americans with Disabilities Act (ADA) and Section 508 requirements.	
BR-36	User Experience	Portal	Non -Functional	The client portal shall have a responsive design (will be a tool that can be read easily on all types of devices, including computers, tablets, and smartphones)	
BR-37	Security	Portal	Non -Functional	The client portal tool shall assure participants that their personal information will be protected and secure.	
BR-38	General	Portal	Functional	The client portal shall allow participants to message local agency staff directly from the tool.	
BR-39	General	Portal	Functional	The client portal shall provide notification to clinic staff when a participant uploads information or documents	
BR-40	General	Compass	Functional	The client portal shall allow participants to print a Verification of Certification (VOC) form in case they move to another state & would like to continue to receive WIC.	
BR-41	General	Compass	Functional	The Client portal shall grant the participants ability to opt out of texting	
BR-42	Shopping	Compass	Functional	The Client Portal shall provide a real-time list of benefits purchased and remaining benefits available to purchase based on the participant's benefits package.	
BR-43	Health	Compass	Functional	The Client Portal shall be able to provide a list of recipes from WIC Health.	
BR-44	General	Compass	Functional	The Client Portal shall contain a service search tool that allows the participant to search for clinics and see the	

				following information: address, phone number, hours of operation and directions.	
BR-45	General	Portal	Functional	The Client Portal shall contain a method by which a participant can give feedback to CDPHE regarding their WIC experience.	
BR-46	Login	Portal	Functional	For clients that have selected text message notification for the portal, the portal shall send a text message displaying login information for the Client Portal. (Temporary Login will be the Family ID for the username and a temporary password.)	
BR-47	Login	Portal	Functional	For clients that have selected email notification for the portal, the system shall send an email displaying login information for the Client Portal. (Temporary Login will be the Family ID for the username and a temporary password.)	
BR-48	General	Portal	Functional	The Client Portal shall have the ability to print screen/pages defined by CDPHE.	
BR-49	Documentation	Portal	Functional	The participant shall have the ability to upload documents to the portal and submit them to their local agency for staff processing.	
BR-50	General	Portal	Functional	The system will have a way of capturing issues outside of business hours via email to be addressed the following work day.	
BR-51	General	Portal	Functional	The application should support self service password reset	
BR-52	Platform	Portal	Nonfunctional	Host Platform shall be internal to CDPHE, however flexible with the environment for the CRM or Client Portal that will be vendor hosted	
BR-53	General	Portal	Nonfunctional	The Client Portal shall support up to 6 languages (current languages supported are: English, Arabic, Burmese, Nepali, Spanish and Somali)	
BR-54	Compliance	Portal	Nonfunctional	The system shall have branding and imaging approved by CDPHE. Branding and agency guidelines will be provided by CDPHE.	
BR-55	Compatibility	Portal	Nonfunctional	The Client Portal shall be compatible with all browsers with more than 3% of the market	
BR-56	Compatibility	Portal	Nonfunctional	The Client Portal shall be mobile friendly for both iOS, Android and Windows-based devices.	
BR-57	General	Portal	Nonfunctional	The system's vendor shall include a disaster recovery strategy.	

BR-58	General	Portal	Nonfunctional	The system's vendor shall have a service level agreement including your provided service and if you are open to modifying the client's needs.	
BR-59	Shopping	JPMA	Nonfunctional	System shall interface to WIC Shopper as necessary to provide required data to the Client Portal.	
BR-60	Health	Compass	Nonfunctional	System shall interface to WIC Health as necessary to provide required data to the Client Portal.	
BR-61	Benefits	Compass	Nonfunctional	System shall interface to WIC/Data Direct as necessary to provide required data to the Client Portal.	
BR-62	General	Compass	Nonfunctional	System shall accept and process database extracts from Compass as necessary to provide required data to the Client Portal.	
BR-63	General	Portal	Nonfunctional	The Client Portal shall be implemented in a phased approach based on the priorities, project schedule and any budget constraints.	
BR-64	General	Compass	Nonfunctional	The system shall generate Portal credentials for existing active users in Compass.	
BR-65	General	Compass	Nonfunctional	The system shall generate Portal credentials for new active users in Compass.	
BR-66	Compliance	Portal	Nonfunctional	The system shall be compliant with the state of Colorado CISO standards located at http://www.oit.state.co.us/ois/policies	
BR-67	Security	Portal	Nonfunctional	Solution shall utilize role based access control.	
BR-68	General	Portal	Nonfunctional	Solution shall audit user actions.	
BR-69	Security	Portal	Nonfunctional	Authentication tickets (cookies) are not transmitted over non-encrypted connections.	
BR-70	Security	Portal	Nonfunctional	Solution shall secure credentials, authenticate tickets, and other sensitive information over network and in persistent stores	
BR-71	Security	Portal	Nonfunctional	The design adopts a policy of using least-privileged accounts.	
BR-72	Security	Portal	Nonfunctional	The design identifies the mechanisms to protect the credentials over the wire (SSL, IPsec, encryption and so on).	
BR-73	Security	Portal	Nonfunctional	The design identifies the identities that are used to access resources across the trust boundaries. These boundaries utilize encryption and least privilege.	
BR-74	Security	Portal	Nonfunctional	Database connections, passwords, keys, or other secrets are not stored in plain text.	
BR-75	Security	Portal	Nonfunctional	Access to system level resources is restricted.	
BR-76	Security	Portal	Nonfunctional	The application's login does not have permissions to access tables directly.	

BR-77	Security	Portal	Nonfunctional	The role design offers sufficient separation of privileges (the design considers authorization granularity).	
BR-78	Security	Portal	Nonfunctional	The application's login is restricted in the database to access-specific stored procedures.	
BR-79	Security	Portal	Nonfunctional	SSL is used to protect authentication cookies.	
BR-80	Security	Portal	Nonfunctional	The contents of authentication cookies are encrypted.	
BR-81	Security	Portal	Nonfunctional	Session lifetime is limited to a configurable unsolicited timeout setting.	
BR-82	Security	Portal	Nonfunctional	Session state is protected from unauthorized access.	
BR-83	Security	Portal	Nonfunctional	The Web site is partitioned into public access areas and restricted areas that require authentication access. Navigation between these areas should not expose sensitive credentials information.	
BR-84	Security	Portal	Nonfunctional	Role Based access control using least privileged is defined using a LDAP or Active Directory Mechanism.	
BR-85	General	Portal	Nonfunctional	Application response time shall not exceed three (3) seconds for Portal's User Interface.	
BR-92	General	Portal	Nonfunctional	The system shall capture application statistics on how the participants are using the application. The statistics shall be compiled and made available to the CDPHE / Clinics monthly.	
BR-94	General	Portal	Nonfunctional	The system shall allow the downloading of information in various formats.	
BR-86	General	Portal	Nonfunctional	The system shall integrate with other office productivity software including MS Office, Google Drive and Adobe.	
BR-87	Texting	Portal	Nonfunctional	The Client portal shall display text messages sent to participants (including history)	
BR-88	Signatures		Functional	The solution shall provide a way for clients to receive documents via text messages and append their signatures	
TEXTING AND CHATBOT					
BR-89	General	Compass	Functional	The solution shall allow a centralized integrated two-way texting platform (conversational) for COWIC staff to interact in real-time with specific audiences and with an easy-to-use interface.	
BR-90	General	Compass	Functional	The solution shall allow automatic responses when WIC staff would not be available	

BR-91	General	Compass	Functional	The solution shall make the SMS messages available in multiple languages including English and Spanish	
BR-92	Security	Compass	Functional	The solution shall adhere to OIT data policy on the type of data that shall be sent via SMS.	
BR-93	General	Compass	Functional	The solution shall allow scripts and procedures for ad hoc situations, otherwise, the custom text messages (flexibility to write specific messages in certain situations other than the custom(fixed) messages)	
BR-94	Chatbot	Portal	Functional	The solution shall provide public facing FAQ's (such as Chat BOT), web based training and other documentation as needed.	
BR-96	Chatbot	Compass	Functional	The solution shall route to all requests or questions that can not be completed on the chatbot platform via FAQs to appropriate clinics or staff contact.	
BR-97	Chatbot	Compass	Functional	The chatbot platform shall provide a means to get feedback from clients and/or site visitors	
BR-99	General	Compass	Functional	The solution shall enable the COWIC staff to request digital signatures via SMS and clients being able to sign on their mobile phones	