



## Volume I Technical

Stealth Solutions, Inc.  
Response  
to

Department of Health and Human Services (HHS)  
Salesforce Professional Support Services

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## Factor 1 – Technical Approach

### Introduction – Team Stealth



Stealth Solutions, Inc. (Stealth), a Virginia-based SBA-certified 8(a) small business, has been providing Salesforce services since 2014. With key personnel holding more than 10 years of Salesforce experience, Stealth is a Salesforce Consulting Partner, offering clients customized solutions such as Service Cloud Implementation,

Customer Relationship Management, and Grants Management. Our Salesforce team is built on delivering maximum value through seamless transitions to Salesforce and continued operational excellence.



In partnership with REI Systems, a federal contracting partner for over 35 years, supporting HHS at FDA, CDC, HRSA, and ACF. Team Stealth brings unparalleled expertise to this project. REI has been a Salesforce partner since 2004, completing over 500 implementations across numerous industries and domains. Over the past 20 years, REI has supported the Health Resources and Services Administration (HRSA), providing a unique understanding of the HHS environment, rules, and regulations. REI's experience has also produced multiple internal subject matter experts (SMEs) in workflows and business processes across both public and private sector use cases, including Business Development, Grants Management, Case Management, Economic Development, Eligibility, Enrollment, and Child Welfare Systems.



Stealth has worked with REI Systems on numerous IT modernization and Salesforce-based projects for the last ten years. With this strong partnership, a track record of delivering successful projects for HHS, and a team of over 100 Salesforce-certified professionals, Team Stealth is fully equipped to meet HHS's Salesforce development, modernization, and

maintenance needs.

### Team Stealth Expertise in Delivering Salesforce Development Services

**Experience with the Salesforce Ecosystem (Sales Cloud, Service Cloud, Public Sector Solutions, Community, Employee Experience, MuleSoft, etc.)**

#### Exhibit 1: Team Stealth Salesforce Experience

Deal Management	Opportunities Scoring	Case Management	Program Eligibility Checker
Technology Transition Tracking, Outreach	Events and Campaigns		Child Fee Subsidy Tracking
Program Application Intake and Review		Customer Relationship Management (CRM)	
Travel Management	Grants Management	Project Management	Expenditure Reporting
Documentation Generation and E-Signature (using Conga, Adobe, DocuSign, etc.)		Asset Tracking	
American Rescue Plan Act (ARPA) Reporting		Risk Management	Site-Visits and Reporting



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Team Stealth has a strong track record of successfully delivering numerous use cases on Salesforce platform for both federal and state agencies (see **Exhibit 1** for example). We specialize in configuring Salesforce to address each client's unique requirements, developing custom accelerators, and creating AppExchange products. One of our flagship solutions, GovGrants®, is a highly configurable, modular Grants Management System (GMS) built on Salesforce. It incorporates best practices in grants management and Salesforce technology to enhance user experience, automate workflows, and improve overall system efficiency. GovGrants® is currently used by over 20 clients, including the Inter-American Foundation (IAF), Northern Border Regional Commission (NBRC), and the Library of Congress (LOC), demonstrating our commitment to delivering scalable and impactful solutions.

Additionally, Team Stealth has developed a suite of in-house accelerators, such as Application Intake, Review and Scoring, Eligibility Checker, Case Management, Documentation Generation, Adobe and DocuSign E-Signature integration, SharePoint Connector, Box Connector, Financial System Connector, and Recipient Portal. These pre-built tools can be packaged and deployed to HHS Salesforce org to expedite project implementation, reduce timelines for responses, and enhance day-to-day program operations.

Team Stealth's Salesforce services are organized into four key areas:

1. **Salesforce Consulting Services:** We assist clients in making critical decisions regarding cloud adoption, determining which applications are best suited for migration to Salesforce. Our consulting services include designing migration roadmaps, process improvements, data migration strategies, and managing change throughout the transition.
2. **Salesforce Implementation Services:** Our certified Salesforce consultants deliver expert configuration, customization, integration, and data migration services. We ensure Salesforce implementations are optimized to maximize value and align with each client's unique business goals.
3. **AppExchange Product Implementation:** We help clients evaluate and deploy AppExchange products, offering thousands of pre-built solutions to meet diverse business needs. Our services include analyzing “Build vs. Buy” options, conducting trials, and recommending the best AppExchange products. We also provide configuration, customization, and ongoing support to ensure the selected product fully meets client requirements.
4. **Client Operations Management Program (COMP):** Our COMP service offers ongoing monitoring, maintenance, and system enhancements for established Salesforce systems. Services include user management, release preparation, issue resolution, system updates, and business function support. Clients benefit from dedicated Subject Matter Experts, ensuring seamless system performance, integration with third-party applications, and support for Salesforce releases and API interfaces.

With these comprehensive services and proven solutions, Team Stealth delivers efficient, scalable, and secure Salesforce support for federal and state agencies.

### **Team Strength – Our People**

Team Stealth includes over 100 Salesforce-certified professionals holding 10 different types of Salesforce certifications, including Salesforce Administrators, Developers, and Consultants. This extensive expertise equips us to meet HHS's needs, from analyzing business processes to developing and implementing Salesforce solutions, while also providing a clear roadmap for leveraging Salesforce in the future. Team Stealth associates support Salesforce solutions across various government agencies, offering HHS access to a deep bench of Salesforce subject matter experts. All proposed staff for this project have extensive experience in multiple Salesforce system implementation and operations and maintenance support.



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## Exhibit 2: Salesforce Certifications Held by Team Stealth Staff

Salesforce Certification	Number of Certified Resources
Administrator	43
App Builder	28
Platform Developer 1	60
Platform Developer 2	46
JavaScript Developer 1	1
Sharing and Visibility Architect	4
Data Architect	4
Experience Cloud Consultant	4
Tableau CRM and Einstein Discovery Consultant	2
OmniStudio Consultant	2

Team Stealth also maintains an in-house recruiting team of more than ten individuals who work with a network of professional talent firms to attract top talent. Our rigorous selection process includes technical and management panel interviews, competency tests such as Brainbench, and coding assessments like HackerRank. We continuously develop our staff through internal training and certification programs, ensuring HHS receives the highest level of expertise and support.

### HHS RFQ-Aligned Salesforce Support Project Examples by Team Stealth

#### Project Experience 1: United States Agency for International Development (USAID) Salesforce USAID Prosper Africa Tracker

Thank you once again for your exceptional work. Your expertise and attention to detail were clearly evident, and the professionalism with which you executed was truly commendable.

—Ali Momand MEL Advisor, USAID.

Team Stealth successfully transitioned the Prosper Africa Salesforce CRM from the previous contractor, taking full ownership of design, configuration, and development. The internal portal was built using Sales Cloud, while the external portal utilized Community Cloud. Team Stealth worked across multiple teams, including privacy, security, engineering, PMO, Change Control Board (CCB), and operations, to complete the security assessment process.

We ensured seamless handover to operations, aligning with

HHS Task 1: Project Management and Task 7: Transition-Out Services. Additionally, we secured FedRAMP certification, addressed system issues, and enhanced performance, security, and user experience, aligning with Task 4: Operations & Maintenance (O&M).

**Development and Enhancements:** We improved and expanded the CRM, enabling global collaboration and addressing evolving USAID needs, directly supporting Task 2: Salesforce Development and Enhancement Services for HHS. We have managed hundreds of change requests and enhancements from requirements gathering to Change Control Board approval. The platform supports partnerships across multiple agencies, aligning with HHS's goal of integration across divisions.

**Training and User Adoption:** We onboarded over 100 users and conducted monthly training sessions to ensure smooth adoption and optimization, mirroring HHS Task 5: User Training and Documentation. We



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created extensive documentation, training videos, and reference guides to facilitate user learning and adoption of the system. Continuous feedback from users allowed us to refine the platform, ensuring it remained intuitive and effective.

**Data Migration and Integration:** Team Stealth migrated data for 800+ organizations, 1000+ contacts, and 100+ deals, overcoming data complexity, similar to HHS Task 3: Data Migration and Integration Services.

**Stakeholder Collaboration:** Team Stealth works closely with USAID teams like ISSO, Security, Privacy, PMO, Engineering, and Operations, demonstrating our ability to navigate complex structures. Our collaboration with partners like the U.S. International Development Finance Corporation (DFC) highlights our expertise in managing cross-agency integrations, supporting HHS Task 6: Cross-Agency Collaboration and Integration Services.

**Relevancy to HHS:** Team Stealth's work on USAID's Salesforce CRM is highly relevant to HHS's objectives. The scope of the USAID Prosper Africa project is very similar to HHS where Team Stealth had to transition from an existing contractor and support the O&M and new development activities. The size of the team is also very similar to HHS requirements and Team Stealth has successfully managed this project for over 2 plus years now.

Our experience includes efficiently configuring Salesforce with minimal customizations, adhering to robust security standards like FedRAMP compliance, and successfully driving user adoption through targeted training and engagement. We have also managed seamless data migration and system integration while empowering end-users with real-time analytics and self-service reporting capabilities. This expertise ensures we can effectively meet HHS's specific needs for Salesforce development and management.

## **Project Experience 2: HRSA Federal Office of Rural Health Policy (FORHP) and EHB's**

**Overview:** FORHP focuses on expanding healthcare access to underserved communities. The outdated Performance Improvement and Measurement System (PIMS) caused delays and inefficiencies in grant performance reporting.

**Agile Development with Salesforce:** Team Stealth developed the Data Collection Platform as a Service (DCPaaS) on Salesforce, improving data collection for 3 grant programs (with 15 more planned). Over 400 grantees and 20 internal users were onboarded. Using Salesforce OmniStudio, we enhanced user experience and created real-time dashboards for program performance tracking. The platform was secured with login.gov authentication.

**Data Migration:** We migrated 800+ grantee organizations, 1,000 users, 100+ grants, and 500+ reports from PIMS to DCPaaS, overcoming data mapping challenges and ensuring a seamless transition.

**Collaboration:** Team Stealth coordinated with federal, state, and local stakeholders, managing program interdependencies and creating a Technical Integration Plan to ensure smooth system integration.

**Stakeholder Engagement and Communication:** We conducted Lean Service Design sessions, sprint demos, and training, ensuring grantees and HRSA staff were well-prepared for the new system. Clear communication through webinars, emails, and user guides facilitated a smooth transition.

**Program Operations:** Our structured approach included discovery sessions, prototypes, and ongoing engagement, enabling stakeholders to easily adopt the new technology with minimal disruption.

Team Stealth has successfully managed over 60 Task Orders and 200+ DME projects for the EHBs enterprise, aligning with HRSA's EPLC framework. We tailor Agile and waterfall SDLC methodologies to meet security and Section 508 requirements. Using PMBOK best practices and CMMI Level 3



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processes, we effectively manage cost, schedule, and quality through a Program Integrated Master Schedule (PIMS), tracking key activities and milestones across all O&M and DME tasks.

We submit required documents via JIRA for stage gate reviews five days in advance, ensuring timely approval by the HRSA PMO and partners. Our approach leverages tools like TFS and SharePoint, focusing on collaboration, proactive risk management, and delivery excellence.

Team Stealth modernized FORHP's performance reporting system with a phased Salesforce implementation, reducing development and rollout time and costs by 20%.

**Relevancy to HHS:** Team Stealth's work with HRSA demonstrates expertise in managing complex Salesforce projects, including developing the Data Collection Platform as a Service (DCPaaS), migrating data, and coordinating with federal, state, and local stakeholders. The team enhanced user experience with Salesforce OmniStudio, onboarded over 400 grantees, and provided extensive documentation and training, ensuring seamless adoption and ongoing support. This experience aligns with HHS's requirements for project management, Salesforce development, cross-agency collaboration, and technical documentation.

## A. Understanding of the Project

Team Stealth fully understands the requirements for providing Salesforce professional support services to the Department of Health and Human Services (HHS), particularly to its Office of the Chief Information Officer (OCIO) and Office of Application Platform Services (OAPS). Our experience managing Salesforce Software as a Service (SaaS) environments and delivering innovative solutions positions us to address HHS's needs effectively. Our extensive background in working with large, complex organizations ensures we are well-suited to enhance service efficiency while supporting the unique structure of HHS's various divisions.

### A.1 Scope, Objectives, and Services

Team Stealth is fully prepared to deliver the comprehensive range of services outlined in the RFQ, ensuring that every task is executed to meet HHS's goals:

1. **Project Management (Task 1):** We'll implement effective project management, including a Project Management Plan (PMP), regular meetings, and risk tracking, ensuring tasks are completed on time and within budget.
2. **Salesforce Analysis and Consultation (Task 2):** We'll conduct a comprehensive Salesforce analysis, offering recommendations to improve performance, security, and alignment with HHS's objectives.
3. **Salesforce Technical Support (Task 3):** Our team will provide ongoing technical support, including system administration, user management, UAT, training, and ensuring data security.
4. **Salesforce Enhancements and O&M (Task 4):** We'll manage upgrades, new features, sandbox environments, and API configurations to continuously improve HHS's Salesforce platform.
5. **Technical Documentation (Task 5):** We'll create and maintain clear, accessible documentation, adhering to HHS standards, including EPLC and Section 508 compliance.
6. **New Salesforce Development (Task 6 - Optional):** If needed, we'll deliver end-to-end Salesforce development, including new workflows, APIs, and security features.
7. **Transition-Out Services (Task 7):** We'll provide a seamless transition plan to ensure all knowledge and responsibilities are transferred smoothly at the end of the contract.



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### **Key Deliverables:**

- **Project Management Plan (PMP):** Delivered within five business days, including work breakdown, metrics, and milestones.
- **Kick-Off Meeting and Minutes:** Agenda and materials provided 24 hours before, and minutes within 24 hours post-meeting.
- **Status Reports:** Bi-weekly and monthly reports on project progress, risks, and financial status.
- **Platform Analysis Reports:** Detailed findings and recommendations for platform improvement.
- **Technical Support Services:** Ongoing system administration, development, and UAT results, with staff training materials.
- **Enhancements and O&M Reports:** Updates on platform upgrades, security, and new features.
- **Technical Documentation:** Comprehensive procedure manuals and technical specifications.
- **New Development Plans (if applicable):** Detailed project plans for new Salesforce features.
- **Transition-Out Plan:** Submitted 90 days before contract completion, detailing milestones for a smooth transition.

By executing these tasks and deliverables, Team Stealth is fully aligned with the goals and objectives outlined in the SOW, ensuring seamless Salesforce development and modernization support for HHS.

### **A.2 Unique Insight into the Project Goals, Environment, Readiness, and Compliance**

Team Stealth understands HHS's goal of enhancing operational efficiency and innovation through Salesforce modernization, reducing costs, and supporting rapid application development across its 11 Operating Divisions (OpDivs) and 16 Staff Divisions (StaffDivs). With extensive experience working with large federal agencies, we are well-versed in managing complex IT projects in regulated environments. We ensure compliance with federal laws like HIPAA, FedRAMP, and FISMA while optimizing the Salesforce platform to meet HHS's unique operational and regulatory needs.

We recognize the complexities of migrating HHS's legacy applications to Salesforce within a highly federated environment. Each OpDiv and StaffDiv has unique data management practices, regulatory requirements, and varying familiarity with Salesforce. Our approach provides tailored solutions to meet these diverse needs, ensuring seamless integration and user adoption while maintaining data security and compliance.

Additionally, Team Stealth has a deep understanding of HHS's internal structure and operational challenges, including managing multiple stakeholders like the Office of the Chief Information Officer (OCIO) and the Office of Application Platform Solutions (OAPS). We are experienced in addressing conflicting priorities, maintaining data consistency, and fostering transparent communication across teams, ensuring efficient project execution and collaboration.

As HHS transitions to cloud-based solutions, Team Stealth will work closely with stakeholders to mitigate risks, optimize configurations, and ensure the platform's success. Our goal is to create a secure, scalable Salesforce ecosystem that aligns with HHS's mission to deliver essential services to the public.



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## A.3 Execution Approach

### A.3.1 Task 1: Project Management Approach

Team Stealth will implement a structured project management approach, starting with a Project Management Plan (PMP) delivered within five business days of contract award. The PMP will include a Work Breakdown Structure (WBS), performance metrics, and schedules for activities and deliverables.

**Meetings and Collaboration:** We will hold a kick-off meeting to align stakeholders and conduct bi-weekly status meetings to review progress and address challenges. All project documentation, updates, and risk logs will be managed via Microsoft Teams and SharePoint for real-time access and transparency.

**Risk Management:** Our risk management framework will proactively identify, assess, and mitigate risks, with regular updates shared during status meetings to minimize disruptions and ensure timely delivery.

**Quality Control and Scheduling:** We will track performance metrics and timelines to ensure tasks are completed efficiently and meet HHS standards. The Program Integrated Master Schedule (PIMS) will manage key activities, milestones, and dependencies, ensuring coordination across all stakeholders.

**Example of Similar Experience from USAID Prosper Project:** Team Stealth implemented a structured project management approach using a comprehensive PMP with a detailed WBS, project schedules, risk management strategies, and performance metrics. We utilized JIRA to manage product and sprint backlogs, ensuring efficient task prioritization, and developed an **annual project roadmap**, reviewed monthly. **Daily check-ins** with the product owner, along with weekly and monthly reports, kept the project on track. **Monthly check-ins** with the System Owner, COR, and key stakeholders, combined with a **risk and action item registry** in Google Drive, facilitated proactive issue tracking. This approach enabled us to complete over 95% of deliverables on time and within budget, ensuring smooth execution of complex Salesforce implementations while coordinating across teams like security, privacy, and operations.

### A.3.2 Task 2: Salesforce Analysis and Consultation Services Approach

Team Stealth will provide comprehensive technical support to optimize HHS's Salesforce platform. We will conduct a detailed platform analysis, assessing configurations, workflows, and security settings to improve performance and alignment with HHS's objectives.

**Expert Consultation:** Drawing from our USAID Prosper Africa Project experience, we will apply our expertise in Salesforce optimization. For Prosper Africa, after transitioning the Salesforce platform from the previous vendor, we conducted a comprehensive audit of **Salesforce security settings**, identifying and correcting a misconfiguration in **sharing rules** that could have exposed sensitive data. We implemented **Salesforce Shield** encryption and **Login IP restrictions** to further secure the platform, ensuring compliance with federal regulations. Additionally, we enhanced the **role hierarchy** and **permission sets** to ensure data visibility was appropriately limited, improving both performance and security. Similar approaches will be used for HHS, providing actionable recommendations for optimizing workflows, enhancing **Salesforce security features**, and aligning the platform with the agency's operational goals.

**Risk Mitigation:** Our USAID experience also highlights our proactive risk mitigation expertise. For Prosper Africa, we performed a risk analysis focusing on **Salesforce security settings** related to **FedRAMP** and **HIPAA** compliance. By identifying risks in **API integrations** and **data storage practices**, we implemented **platform encryption** and **multi-factor authentication (MFA)** to mitigate potential vulnerabilities. At HHS, we will apply these strategies to ensure compliance with **FISMA**, **FedRAMP**, and **HIPAA**, addressing risks before they become issues. We will assess HHS's **Salesforce**



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**environment** for any vulnerabilities in **third-party integrations** and **API configurations**, ensuring the platform is scalable and secure.

**Continuous Improvement:** Continuous platform improvement is a core component of our approach. At USAID, we enhanced the Salesforce platform's efficiency by implementing **Salesforce OmniStudio** to streamline complex workflows and provide real-time **analytics dashboards** that improved decision-making. We regularly monitored platform performance, identifying bottlenecks in **Lightning components** and optimizing **custom code** to reduce processing time by 15%. We also conducted **Apex trigger audits** to improve data processing efficiency and reduce platform errors. For HHS, we will similarly ensure that the Salesforce platform remains optimized through routine audits, performance monitoring, and **automating workflows** where possible. Our expertise in **Salesforce Flow Builder** and **Process Builder** will allow us to automate repetitive tasks and reduce manual intervention, ensuring HHS's system remains efficient and scalable as needs evolve.

By applying these Salesforce-specific strategies, Team Stealth will ensure HHS's platform operates at peak efficiency, securely, and in alignment with its long-term strategic goals.

#### **A.3.3 Task 3: Salesforce Technical Support Services Approach:**

Team Stealth will provide comprehensive Salesforce Technical Support to optimize HHS's platform, ensuring security, efficiency, and alignment with strategic objectives.

**System Administration and User Management:** Leveraging our experience with USAID and HRSA, we will manage HHS's **user roles, permissions, and access controls** to ensure **FedRAMP, HIPAA, and FISMA** compliance. For USAID and HRSA, we implemented **MFA**, enforced **IP restrictions**, and automated the onboarding process using **Flow Builder**, reducing setup time by 50%. For HHS, we will apply similar security measures and optimize user management for a secure and efficient environment.

**Platform Enhancements and UAT:** In both the USAID and HRSA projects, we enhanced the Salesforce platform by configuring **custom objects, workflows, and OmniStudio** for improved data processing. We used **test automation** to streamline **UAT** and developed **custom dashboards** for real-time performance tracking. For HHS, we will ensure platform enhancements are rigorously tested and aligned with organizational goals, enhancing reporting and data accessibility.

**Technical Support and Security Compliance:** We provided rapid technical support for USAID and HRSA, resolving most issues within one business day and working with the Information Privacy Security Officer (**IPSO**) on **FedRAMP** and **ATO** audits. We secured **API endpoints** with **OAuth 2.0** authentication, preventing unauthorized access. For HHS, we'll implement similar technical support and security protocols, ensuring compliance and addressing system issues promptly.

**Continuous Monitoring and Training:** At USAID and HRSA, we continuously monitored system performance by auditing **Salesforce event logs**, tracking **login activities**, and leveraging **Salesforce Shield** for enhanced security. We integrated these logs with **Splunk**, creating real-time reporting and dashboards for continuous monitoring of system activities, security events, and potential anomalies. This allowed us to proactively address any issues related to data access, unauthorized activity, or system performance. The **Salesforce Shield** logs provided additional insights into platform encryption, user interactions, and data flows, ensuring full visibility into platform operations.

We also conducted training sessions using **Trailhead** modules and custom guides, empowering users to effectively manage and leverage Salesforce's capabilities. For HHS, we will implement similar monitoring, auditing, and training practices to ensure the platform is secure, compliant, and optimized for performance.



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By applying these Salesforce best practices from our USAID and HRSA experience, Team Stealth will deliver optimized technical support, ensuring HHS's platform is secure, compliant, and continuously improving to meet its needs.

#### **A.3.4 Task 4: Salesforce Enhancements and Operations and Maintenance (O&M) Services Approach**

Team Stealth will provide comprehensive Salesforce Enhancements and O&M Services to ensure HHS's platform remains optimized, secure, and scalable, drawing on our deep experience with **USAID** and **HRSA** projects.

**Platform Enhancements:** We will implement new features and improve existing functionalities based on user feedback and HHS's evolving needs. In the USAID project, we leveraged Salesforce OmniStudio to automate complex workflows, drastically reducing manual input and increasing operational efficiency. For HRSA, we incorporated **Salesforce Flow** and **Process Builder** to automate approvals and data entry, reducing task completion time by 30%. Additionally, we utilized **Einstein Analytics** to provide actionable insights and predictive analytics, allowing stakeholders to make data-driven decisions. For HHS, we will apply similar enhancements, utilizing low-code tools, AI-driven analytics, and automation to streamline workflows. All updates will undergo User Acceptance Testing (UAT) to ensure they meet HHS's objectives.

**Ongoing Operations and Maintenance:** Team Stealth will provide continuous O&M support, including system monitoring, performance tuning, and routine updates. In the USAID project, we used the **Salesforce Case Object** to automate support ticket creation, allowing users to submit tickets directly from within the system. We implemented a workflow to route tickets based on case type, ensuring they reached the appropriate team for resolution. We consistently met SLAs, providing initial responses within 24 hours and resolving issues quickly. Similarly, for HHS, we will establish automated workflows for issue tracking and support, ensuring minimal downtime and efficient platform operations.

**Security and Compliance:** For both **USAID** and **HRSA**, we ensured strict compliance with **FedRAMP**, **HIPAA**, and **FISMA** through regular security audits and **annual security assessments**. Using **Salesforce Shield**, we encrypted data at rest and in transit, while monitoring **login activities**, **event logs**, and **user actions** to prevent unauthorized access. We integrated real-time logs with **Splunk** for continuous monitoring, allowing us to proactively address potential threats. For HHS, we will implement similar measures, maintaining user access controls, data encryption, audit trails, and supporting **annual security assessments** to ensure ongoing compliance and system security.

**Monitoring and Reporting:** We will continuously monitor HHS's Salesforce environment and provide regular performance reports. In the **USAID** project, we ran **Salesforce Org Health Checks** quarterly, identifying configuration and security issues early. Additionally, we performed **duplicate record checks** using **Duplicate Management Rules** to ensure data cleanliness. Any issues discovered were prioritized in our backlog and resolved promptly. For HHS, we will provide similar **real-time monitoring**, including automated health checks, duplicate data cleanups, and performance reporting to ensure the platform operates at peak efficiency.

**Support and Knowledge Transfer:** At **HRSA**, we provided continuous support by addressing user inquiries and technical issues promptly. We also conducted **training sessions** and developed tailored **knowledge transfer materials** to enable staff to manage the platform independently. For HHS, we will replicate this approach, offering ongoing **user training** on key features such as **Flow Builder**, **Process Builder**, and **custom report creation**. We will also provide comprehensive **documentation** to ensure HHS staff can troubleshoot issues and maintain the system effectively post-transition.



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Our approach ensures HHS's Salesforce platform remains secure, efficient, and aligned with its long-term goals.

#### A.3.5 Task 5: Technical Documentation Approach

Team Stealth will provide comprehensive and compliant technical documentation for HHS's Salesforce platform, covering system architecture, configurations, workflows, and security protocols. All documentation will align with **HHS's EPLC** and **Section 508** standards, with submissions made via **JIRA** five business days in advance.

Our experience with **USAID** and **HRSA** includes delivering detailed technical documentation that enhanced both compliance and user adoption. For **Prosper Africa**, we developed and uploaded comprehensive **procedure manuals**, **technical specifications**, and **Quick Reference Guides (QRGs)** to a centralized government-owned platform within one week of completion, ensuring 100% compliance. These QRGs played a critical role in training and onboarding staff, simplifying the adoption of new Salesforce features, and maintaining operational continuity. For **HRSA**, we created **training modules** tailored to different user roles, which significantly improved user proficiency with new Salesforce functionalities.

We will implement **version control** for HHS documentation to ensure timely updates and store all materials on **SharePoint** for easy access. In addition to technical records, we will develop **user guides** and **training materials** to support staff in managing the Salesforce platform efficiently.

To support **Authority to Operate (ATO)** requirements, we will deliver **audit reports**, and **risk assessments**, and maintain compliance documentation. As part of **Transition-Out Services**, we will ensure thorough knowledge transfer for seamless handovers, drawing from our successful knowledge-sharing efforts in USAID and HRSA projects.

This approach ensures HHS has the necessary documentation for effective management, compliance, and user adoption of its Salesforce platform.

#### A.3.6 Task 6: New Salesforce Development (Optional Task) Approach

Team Stealth will deliver end-to-end Salesforce development services tailored to HHS's evolving needs, leveraging our **USAID** and **HRSA** experience and applying an **Agile Scrum methodology** with continuous user feedback.

We will start by collaborating with HHS stakeholders to gather detailed requirements for new features. In both **Prosper Africa** and **HRSA** projects, we used **Scrum sprints** to gather and quickly incorporate user feedback, ensuring alignment with program goals. Our team will develop **custom objects**, **workflows**, and **automation**, ensuring compliance with **FedRAMP**, **HIPAA**, and **Section 508** standards.

Once developed, we will conduct **User Acceptance Testing (UAT)** to validate features, followed by a smooth deployment process with minimal disruption. Post-implementation, we will provide monitoring, bug fixes, and technical support to ensure operational continuity, as we successfully did for **Prosper Africa**.

To ensure successful adoption, we will offer **training sessions** and deliver comprehensive documentation, similar to our approach with **HRSA**, where we provide tailored user guides and training to enhance proficiency.

Our approach guarantees that HHS's Salesforce developments are scalable, secure, and fully integrated, with continuous refinement based on user feedback to meet the agency's long-term goals.



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#### A.3.7 Task 7: Transition-Out Services Approach

Team Stealth will provide a comprehensive Transition-Out Plan to ensure a seamless handover of responsibilities and system knowledge to HHS or the incoming service provider. We have extensive experience with large-scale transitions, including the **FDA SIRCE** program, where we successfully transitioned more than **200 personnel** within two months. This demonstrates our ability to manage complex transitions efficiently without disrupting ongoing operations.

We will develop a detailed transition plan that includes **timelines**, **milestones**, and **assigned roles** to streamline the process. This plan will ensure that all **data**, **system configurations**, and **integrations** are securely transferred while maintaining full operational continuity.

**Knowledge Transfer and Documentation:** Team Stealth will conduct comprehensive knowledge transfer sessions for HHS staff or the new service provider. These sessions will include hands-on training and detailed documentation covering **system architecture**, **customizations**, **Standard Operating Procedures (SOPs)**, and **troubleshooting guides**. All documentation will adhere to **HHS's EPLC** and **Section 508** standards to ensure the incoming team has the resources necessary for effective platform management.

**Ongoing Support:** Throughout the transition, Team Stealth will provide ongoing support, addressing any issues and ensuring a smooth handover. Our approach includes continued technical assistance post-handover to resolve any lingering issues, ensuring operational stability. We will ensure that HHS and the new provider can manage the platform effectively after the transition.

Finally, we will deliver a **Final Transition Report** summarizing the handover activities and documentation. If required, we will offer **post-transition support** to address any final concerns, ensuring HHS and the new provider are fully equipped to manage the Salesforce platform independently and efficiently.

#### A.4 Challenges and Mitigation Strategies for HHS Salesforce Implementation

Team Stealth recognizes several key challenges in Salesforce implementation, integration, and support, particularly within a complex organization like HHS. One of the major challenges is **data migration**, which requires mapping and transforming data between Salesforce and legacy systems. Ensuring proper data mapping, handling format differences, and performing necessary transformations can be complex. To mitigate this, Team Stealth will use **Salesforce Data Loader** for bulk data import, export, and updates, while implementing thorough **data validation** and **testing** processes to ensure data integrity.

Another significant challenge is **integration with legacy systems**. Integrating Salesforce with existing HHS systems, which may have different data structures, security protocols, and technology stacks, can lead to complexities. To address this, Team Stealth will leverage **MuleSoft for API management** and **Salesforce Connect** for real-time data integration. Our team's extensive experience with these tools will ensure **seamless data exchanges**, maintaining data consistency, accuracy, and security. During the USAID Prosper Africa project, one of the significant risks was the potential loss or corruption of data during migration from legacy systems to the new Salesforce platform. This risk is highly relevant to HHS, where data integrity is critical, especially when dealing with sensitive health information. To mitigate this risk, Team Stealth implemented a multi-step data validation and verification process. We conducted thorough data mapping, used automated data migration tools to minimize manual errors, and performed extensive testing in sandbox environments before the actual migration. Additionally, we established multiple checkpoints and reconciliation processes to ensure all data was accurately transferred, thereby maintaining the integrity and confidentiality of the data throughout the transition.



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Ensuring **security and compliance** with regulations such as **HIPAA**, **FISMA**, and **FedRAMP** is critical, especially when handling sensitive health data. We will use **Salesforce Shield** for enhanced data security, including encryption and event monitoring while conducting regular **security audits** and **vulnerability assessments**. Team Stealth will work closely with HHS's **Security Officer** to address any security concerns and manage **Authority to Operate (ATO)** requirements. In the Prosper Africa project, there were concerns about maintaining compliance with federal regulations such as the Federal Information Security Management Act (FISMA) and data privacy standards, similar to those required by HHS, including HIPAA compliance. To address these concerns, Team Stealth implemented robust security protocols, including role-based access controls, multi-factor authentication, and regular security audits. We also worked closely with USAID's MCIO to ensure all configurations and customizations adhered to the latest security guidelines and compliance requirements.

**Managing stakeholder expectations** across HHS's diverse OpDivs and StaffDivs is another challenge, especially with varying technical proficiencies. To mitigate this, we will use the **Agile Scrum methodology** for early feedback, stakeholder engagement, and peer reviews, ensuring flexibility and timely adjustments. Our comprehensive **change management plan** will include user training through **Salesforce myTrailhead**, customized modules, and support systems to drive smooth user adoption. A **feedback mechanism** will also be established to address user concerns and improve engagement.

Lastly, continuous innovation and scalability are vital as HHS's needs evolve. Team Stealth will leverage Salesforce's latest features and **AI capabilities**, such as **Einstein Analytics** for predictive insights and **Einstein Bots** for enhanced customer service automation, ensuring the platform remains scalable and adaptable. In our previous work, we implemented **Salesforce OmniStudio** to streamline complex workflows and used **Flow Builder** to automate approval processes, reducing manual effort by 30%. We will maintain a **modular architecture** that supports the integration of new features like **MuleSoft** for API-driven integrations and **Salesforce Shield** for enhanced security. This ensures the platform can scale and grow alongside HHS's evolving requirements.

By anticipating these challenges and implementing tailored mitigation strategies, Team Stealth ensures the successful delivery, integration, and management of Salesforce solutions for HHS.

## B. Management Plan

Team Stealth is committed to delivering a comprehensive and structured approach to manage the Salesforce implementation and support project for HHS. Our management plan is built around a robust Project Management Plan (PMP) that encompasses key components such as project planning, personnel management, communication, change management, quality control, risk mitigation, and cost control. This plan ensures alignment with HHS's objectives and successful project delivery.

### B.1 Project Plan

Our Project Plan will outline all phases of the project, from initiation through closure, and will follow the Agile methodology to ensure flexibility and iterative development. The plan will detail the following phases:

- **Initiation:** Requirements gathering and stakeholder alignment;
- **Planning:** Development of the Work Breakdown Structure (WBS), task assignments, and timeline;
- **Execution:** Development, configuration, UAT, and system deployment;
- **Monitoring and Controlling:** Regular reporting, risk management, and quality assurance; and
- **Closure:** Final handover and transition-out services.



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Team Stealth will submit the PMP within five business days of the contract award, followed by a kickoff meeting to align all stakeholders.

### **B.1.1 Work Breakdown Structure (WBS)**

The WBS will break down the project into manageable work packages, clearly defining tasks, responsibilities, and deadlines. This will enable effective tracking of project progress and ensure accountability for each deliverable. Below is a draft WBS which will be evolved after contract award and will be part of the revised PMP.

1. **Project Management:** Team Stealth will develop a comprehensive 1.1 Project Management Plan (PMP) that defines the project scope, work breakdown structure (WBS), schedule, performance metrics, and risk management strategies. 1.2 Kick-off and Status Meetings will be conducted, followed by bi-weekly status meetings, with meeting minutes provided for transparency. 1.3 Progress Monitoring will involve tracking project schedules, updating risk logs, and delivering bi-weekly and monthly status reports.
2. **Salesforce Analysis and Consultation Services:** 2.1 Platform Review and Analysis will be conducted to assess Salesforce platform settings, application development, and integration and security configurations. Based on this, 2.2 Optimization Recommendations will be documented and presented to stakeholders. 2.3 Risk Mitigation and Reporting will include identifying potential risks, developing mitigation strategies, and reporting them to OAPS project managers.
3. **Salesforce Technical Support Services:** 3.1 Salesforce System Administration will involve managing user accounts, profiles, permissions, and configuring Salesforce settings, while also providing daily technical support. 3.2 Platform Development and Enhancements will include customizing Salesforce components, performing API integrations, conducting User Acceptance Testing (UAT), and deploying solutions in sandbox and production environments. 3.3 Training and User Support will focus on developing training materials, conducting sessions, and providing ongoing user support for federal staff.
4. **Salesforce Enhancements and Operations & Maintenance (O&M) Services:** 4.1 Continuous Platform Enhancements will be carried out, including improvements to Salesforce objects, workflows, and features, as well as managing sandbox environments for testing. 4.2 Operations and Maintenance (O&M) services will involve monitoring platform performance, conducting system updates, managing security settings, and providing continuous support to HHS users.
5. **Technical Documentation:** 5.1 Technical Documentation Development will include the creation of procedure manuals, SOPs, technical specifications, and process documentation, ensuring compliance with HHS EPLC and Section 508 standards. 5.2 Documentation Maintenance and Updates will involve regularly updating documentation in a centralized repository, such as SharePoint, and providing training to stakeholders to ensure access to the most current versions.
6. **New Salesforce Development (Optional Task):** If required, Team Stealth will conduct 6.1 Requirement Gathering and Analysis, identifying new development needs, conducting needs assessments, and proposing solutions. 6.2 Development and Testing will focus on developing and testing new Salesforce objects, workflows, and integrations in a sandbox environment, followed by deployment to production. 6.3 Post-Deployment Support will include monitoring system performance and addressing any issues post-deployment.
7. **Transition-Out Services:** At the end of the contract, Team Stealth will develop a 7.1 Transition-Out Plan that outlines milestone, roles, responsibilities, knowledge transfer, and data migration strategies. 7.2 Knowledge Transfer and Handover will involve providing training to the incoming provider and delivering detailed documentation of all project deliverables. 7.3 Transition Coordination will focus



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on ensuring a smooth handover by closely collaborating with the incoming provider, monitoring transition activities, and resolving any issues during the process.

### B.1.2 High-Level Timeline

A detailed timeline will be provided in the Project Plan, with clear milestones and deliverables for each phase. **Exhibit 3** provides a breakdown of Tasks 1 to 7 for the Salesforce Development Support Services Project for HHS, organized by task and showing key activities that will take place over the 5 years of performance.

**Exhibit 3: Five-Year Breakdown of Tasks and Key Activities**

Task	Year 1 (2024-2025)	Year 2 (2025-2026)	Year 3 (2026-2027)	Year 4 (2027-2028)	Year 5 (2028-2029)
<b>Task 1: Project Management (Ongoing)</b>	Develop PMP, kick-off meeting, set scope, schedule, WBS, and risk management. Conduct bi-weekly meetings and provide regular status reports.	Continue regular meetings, risk tracking, and bi-weekly/monthly reports.	Maintain project reporting, risk tracking, and communication.	Continue reporting, risk tracking, and stakeholder communication.	Final project reports, completion of milestones, and stakeholder approval.
<b>Task 2: Salesforce Analysis and Consultation</b>	Review platform (settings, development, security, integrations), provide optimization recommendations, and develop risk mitigation strategies.	Provide follow-up consultations based on system changes or new requirements.	Additional consultations based on evolving needs.	Continue consultations for system optimization.	Final consultations to ensure the system operates optimally before transition.
<b>Task 3: Salesforce Technical Support Services</b>	Provide system administration, technical support, UAT, and deploy solutions.	Ongoing system administration, support, and development tasks.	Continue system support, technical troubleshooting, and user training.	Maintain full technical support, troubleshooting, and administration.	Continue full support until the contract ends, including final system maintenance and UAT.
<b>Task 4: Salesforce Enhancements and O&amp;M Services</b>	Begin continuous enhancements (objects, workflows, AI tools), manage security, and monitor platform performance.	Continue platform enhancements, integrate new features, monitor performance, and manage security.	Further enhancements and platform maintenance activities.	Continue platform enhancement and maintenance activities.	Final O&M support and system enhancements, ensuring the platform is optimized for transition.



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Task	Year 1 (2024-2025)	Year 2 (2025-2026)	Year 3 (2026-2027)	Year 4 (2027-2028)	Year 5 (2028-2029)
	Provide O&M support.				
<b>Task 5: Technical Documentation (Ongoing)</b>	Develop documentation (SOPs, specs), ensure compliance with HHS standards, and maintain repository (SharePoint).	Update documentation based on system changes and new developments and maintain compliance.	Continue to update documentation based on any system changes.	Update and maintain documentation, ensuring compliance with HHS standards.	Finalize all documentation, and ensure compliance before handover.
<b>Task 6: New Salesforce Development (Optional)</b>	Gather requirements, and develop new objects, workflows, and integrations. Test and deploy to production if required.	Continue new development tasks initiated in Year 1, test and deploy features.	Further new development as needed based on HHS requirements.	Continue ongoing development and deployment of new features.	Complete any remaining new development tasks, and ensure features are operational.
<b>Task 7: Transition-Out Services</b>					Begin planning Transition-Out Plan, including milestones, roles, knowledge transfer, and data migration strategies  Execute Transition-Out Plan, provide knowledge transfer, handover documentation, and ensure a smooth transition to the incoming provider.

#### Key Milestones:

- Task 1 (Ongoing):** Continuous project management, meetings, and reporting throughout the 5 years.
- Task 2 (Year 1):** Initial Salesforce analysis and consultation, follow-up consultations as required in later years.
- Task 3 (Ongoing):** Continuous technical support and platform administration over the 5 years.
- Task 4 (Ongoing):** Continuous platform enhancements and O&M services across all five years.



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5. **Task 5 (Ongoing):** Continuous development and updating of technical documentation throughout the contract period.
6. **Task 6 (Optional):** New Salesforce development, as required, beginning in Year 1 and continuing as needed.
7. **Task 7 (Year 5):** Execution of the Transition-Out Plan in Year 5, ensuring smooth knowledge transfer and handover to the incoming provider.

This timeline organizes the tasks over the 5 years **(09/30/2024 - 09/29/2029)**, ensuring all key activities are completed effectively and in alignment with HHS's objectives.

## B.2 Personnel Management

**Team Stealth** is committed to providing highly qualified personnel to deliver Salesforce Professional Support Services for the U.S. Department of Health and Human Services (HHS). Our personnel management approach ensures that the right individuals are assigned to the right roles, maintaining alignment with HHS's goals and technical requirements. This plan outlines our approach to staffing and resource management, ensuring optimal project performance and adherence to the HHS RFQ requirements. The proposed **team structure** includes the following roles:

1. **Project Manager (PM 0.35 FTE):** Proposed as a **key resource**, the Project Manager will oversee the overall execution of the project, ensuring that all tasks are completed on time, within scope, and budget. Responsibilities include developing and maintaining the Project Management Plan (PMP), which outlines schedules, risk management strategies, and performance metrics. The PM will conduct regular status meetings with stakeholders, including the Contracting Officer's Representative (COR) and HHS Project Managers (PMs), to provide updates and address any concerns. Additionally, the PM will coordinate with all team members to ensure alignment with project goals, proactively manage risks, and maintain clear communication across the project.
2. **Salesforce Administrator (0.9 FTE)** will manage daily operations of the Salesforce platform, including user management, system configuration, and technical support while ensuring compliance with FISMA, HIPAA, and FedRAMP. They will collaborate with the Security Officer (SO) to maintain security and work with Salesforce Developers to implement updates and enhancements. Additionally, the Admin will conduct user training, maintain documentation, and ensure compliance with Section 508 accessibility standards, supporting HHS's operational efficiency and security.
3. **Salesforce Developers (1.45 FTE):** The Salesforce Developers will be responsible for developing, customizing, and configuring Salesforce components to meet the specific needs of HHS. Their tasks include building custom objects, workflows, and triggers, managing API integrations to ensure seamless data exchange with external systems, and conducting thorough testing (including unit and integration tests) to ensure quality and functionality. The full-time developer (1 FTE) will focus on core development activities, such as implementing new features, performing system updates, and resolving technical issues. The part-time developer (0.45 FTE) will provide additional support during periods of high demand and will assist with **Task 2: Salesforce Analysis and Consultation Services**, contributing technical expertise to evaluate existing platform configurations and recommending improvements to optimize performance and align with HHS's strategic goals. This flexible development team ensures that all Salesforce-related tasks are executed efficiently and on schedule.



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## Personnel Resource Allocation and Task Assignment

Task	Lead Personnel	Supporting Personnel
Task 1: Project Management	PM	Salesforce Administrator, Developer
Task 2: Salesforce Analysis and Consultation	Salesforce Developers	Salesforce Administrator, PM
Task 3: Salesforce Technical Support Services	Salesforce Administrator	Salesforce Developers, PM
Task 4: Salesforce Enhancements and O&M Services	Salesforce Developer	Salesforce Administrators, PM
Task 5: Technical Documentation	Salesforce Administrator	Salesforce Developers, PM
Task 6: New Salesforce Development (Optional)	Salesforce Developers	Salesforce Administrator, PM
Task 7: Transition-Out Services	PM	Salesforce Administrator, Developers

## Contingency Plan for Staffing Changes or Shortages

Team Stealth has a proactive contingency plan to ensure uninterrupted support for HHS in the event of staffing changes or shortages. Our approach focuses on maintaining continuity through resource redundancy, proactive talent management, and rapid response measures.

- Talent Pool & Succession Planning:** We maintain a pool of pre-screened Salesforce professionals and cross-train team members to cover key roles. This ensures we can quickly fill vacancies or adjust staffing without service disruptions.
- Partner Support & Commitments:** We have strategic partnerships and commitment letters from subcontractors, providing additional staffing resources when needed to support HHS without impacting project timelines.
- Rapid Response:** In case of staffing shortages, our Project Manager will activate the contingency plan, engage recruitment, and inform HHS immediately. We ensure quick resolution to maintain project continuity.
- Ongoing Monitoring:** We regularly monitor team capacity and adjust resource plans as necessary, identifying and addressing staffing risks before they affect the project.

These measures ensure any staffing issues are handled swiftly, keeping the project on track without compromising quality.

## Personnel Development and Support

- Training and Development:** To ensure our personnel remain at the forefront of technology and project management best practices, Team Stealth invests in continuous training. All personnel will have access to the latest Salesforce training programs, ensuring that their skills are current and aligned with HHS's evolving needs.
- Team Collaboration:** Our personnel management approach emphasizes strong internal collaboration through regular team meetings, ongoing performance evaluations, and adherence to a structured communication plan. This ensures alignment within the team and with HHS stakeholders.

Team Stealth's personnel management plan ensures HHS receives a highly skilled and dedicated team to deliver Salesforce Professional Support Services. With well-defined roles, clear resource allocations, and a focus on both continuity and training, we are confident in our ability to meet all contract requirements. Our proactive staffing strategy, contingency planning, and continuous development efforts guarantee consistent project delivery and performance excellence throughout the contract period.



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## B.3 Communication Management Plan

Team Stealth will employ a comprehensive communication strategy to ensure effective collaboration within the project team and with HHS stakeholders throughout the Salesforce Development Support Services project. Our plan ensures clear, consistent, and timely communication, aligned with the HHS RFQ requirements, fostering collaboration, transparency, and effective decision-making over the 5 years of performance.

**Communication Objectives:** Team Stealth will ensure transparency by providing regular, clear updates on project progress, risks, and deliverables to HHS stakeholders. Stakeholder engagement will be facilitated through collaboration between the project team, HHS leadership, the Contracting Officer's Representative (COR), and technical leads. All communications will align with HHS's goals and ensure compliance with regulatory requirements such as HIPAA, FedRAMP, FISMA, and Section 508.

**Communication Channels:** Email will be used for formal updates, meeting invitations, and document sharing, while Microsoft Teams or SharePoint will serve as a centralized platform for collaboration, file sharing, and project updates. JIRA will be employed for task management, issue tracking, and real-time status updates. Meetings will include regular status reviews, ad-hoc discussions, and project reviews, supplemented by weekly progress reports, bi-weekly risk logs, and monthly status reports.

**Communication Strategy:** A dedicated Microsoft Teams or SharePoint site will be established to centralize all project-related information, such as agendas, minutes, documents, and updates, promoting transparency and real-time collaboration. Bi-weekly status meetings with the COR and HHS Project Managers will review progress, milestones, risks, and feedback, with minutes shared within one business day. Monthly check-ins with broader stakeholders will review financials, risks, and progress, including comprehensive reports covering tasks, accomplishments, and financial status. Ad-hoc meetings will be held as needed to address urgent concerns, scope changes, or emerging risks.

**Reporting and Updates:** Written monthly reports will include updates on tasks, significant accomplishments, issues, and upcoming goals, shared via email and uploaded to Microsoft Teams or SharePoint for easy access. Real-time dashboards will provide visibility into key metrics, risk logs, and performance indicators. Email updates will communicate urgent issues, decisions, or project changes.

**Escalation Process:** Unresolved issues will follow a tiered escalation process, moving from the PM to the COR, and if necessary, to HHS leadership. Regular risk management meetings will be held to address and mitigate project risks efficiently.

## B.4 Change Management Plan

Team Stealth's Change Management Plan ensures all project changes to scope, schedule, resources, or budget are handled systematically, minimizing disruptions and maintaining alignment with HHS's strategic goals and compliance requirements.

- Change Request Documentation and Control Process:** All change requests will be documented using a standardized Change Request Form (CRF) on Microsoft Teams or SharePoint. The form captures details such as the nature of the change, impacts on scope, schedule, and resources, and associated risks. The Project Manager (PM) will review the request before forwarding it to the Change Control Board (CCB), comprising key stakeholders like the COR and technical leads. The CCB will conduct an impact analysis to assess technical feasibility and resource availability and will approve, modify, or reject the request based on the analysis.
- Change Evaluation, Approval, and Implementation:** Once a change is approved by the CCB, the PM will update the Project Management Plan (PMP) and schedules. An action plan will be developed



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for implementation, with clear task assignments and stakeholder notifications. The PM will monitor progress and report on the status of the change through regular updates in status meetings and monthly reports.

3. **Communication Strategy for Change Management:** To ensure clear communication, a change notification will be sent to all affected stakeholders, detailing the approved change, its impacts, and the implementation plan. Regular updates will be provided in bi-weekly meetings and monthly reports, with all relevant documentation posted on Microsoft Teams or SharePoint. Stakeholders will be engaged in regular meetings to discuss any concerns or provide feedback on changes.
4. **Success Metrics:** Success will be measured by timely implementation, minimal disruption to project milestones, and stakeholder satisfaction with the change management process.

Team Stealth's Change Management Plan ensures structured, transparent handling of all changes, keeping the project on track and aligned with HHS's objectives while minimizing disruptions.

## B.5 Reports

Team Stealth's Reporting Plan ensures consistent, transparent, and timely communication with HHS throughout the Salesforce Professional Support Services contract. We will provide **monthly status reports** on task progress, risks, financial status, and milestones, supplemented by **bi-weekly progress updates** to keep stakeholders informed of ongoing activities. Risk and issue logs will be maintained in real-time and reviewed during status meetings, with escalations made to the Project Manager, COR, and HHS leadership as necessary. Additionally, **quarterly performance reviews** will track overall project health and align it with HHS objectives, covering key metrics such as resource utilization, deliverable quality, and financial status.

Collaboration will be facilitated through **Microsoft Teams, SharePoint, and JIRA** to ensure seamless access to all reports, updates, and project documentation. This structured approach will help maintain transparency, mitigate risks, and ensure timely decision-making, ensuring the successful delivery of the project while meeting all HHS requirements.

## B.6 Quality Assurance and Control Plan

Team Stealth's Quality Assurance (QA) and Quality Control (QC) Plan ensures that all Salesforce development support services for HHS meet high standards of performance, security, and compliance. Our approach integrates QA and QC across every stage of the project, ensuring adherence to federal regulations like HIPAA, FISMA, FedRAMP, and Section 508. The QA process begins with a comprehensive QA Plan that outlines methodologies for functional, regression, performance, and security testing. We implement a risk-based testing approach to prioritize critical areas, ensuring early identification and resolution of issues.

Our Quality Control procedures involve rigorous testing and validation of all Salesforce components to ensure functionality, performance, and security. Each deliverable undergoes a structured review process, including peer reviews, compliance checks, and regular audits. We maintain a defect management process to track and resolve issues efficiently before deployment, ensuring the platform performs optimally and meets HHS's requirements.

Compliance with federal regulations is a key focus, with regular security and compliance audits to ensure data security and adherence to HIPAA, FISMA, FedRAMP, and Section 508 accessibility standards. We continuously gather feedback from HHS stakeholders and perform ongoing audits and peer reviews to refine our processes and improve quality.



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Success is measured through metrics like defect resolution, compliance audit results, and user satisfaction. By combining comprehensive testing, structured reviews, and stakeholder engagement, Team Stealth ensures the delivery of high-quality Salesforce solutions that meet HHS's operational needs and regulatory requirements.

## B.7 Risk Management and Risk Mitigation Approach

Team Stealth's Risk Management and Mitigation Approach for the HHS Salesforce Development Support Services focuses on proactive identification, assessment, and management of risks throughout the project lifecycle. Risks will be logged in a Risk Register, covering areas such as scope, schedule, budget, performance, compliance, and security. Each risk will be evaluated using a Risk Assessment Matrix to determine its likelihood and impact, followed by prioritization to ensure that high-impact risks are addressed first. This structured process ensures that risks are continuously monitored and documented, allowing for transparency and timely response.

To mitigate risks, Team Stealth will develop tailored Risk Mitigation Plans, which include both preventative actions and contingency plans. We will implement strategies such as security testing, compliance audits, and real-time monitoring through tools like JIRA and SharePoint to detect risks early. Regular communication with HHS stakeholders, including bi-weekly meetings and monthly progress reports, will ensure everyone is informed of any active risks and mitigation efforts, promoting collaborative decision-making.

Our Risk Monitoring process includes continuous updates to the Risk Register and periodic risk audits to evaluate mitigation strategies. For unresolved high-priority risks, an escalation process will be initiated to involve HHS leadership for prompt resolution. Success will be measured by the effective mitigation of risks, on-time project delivery, and stakeholder satisfaction with the transparency and effectiveness of the risk management process.

## B.8 Cost Control Approach

Team Stealth's Cost Control Plan for the HHS Salesforce Development Support Services project ensures strict adherence to budgetary constraints while delivering high-quality services. Our approach begins with the development of a detailed Project Management Plan (PMP) that outlines all project costs, including labor, resources, tools, and any other relevant expenses. A Work Breakdown Structure (WBS) will be employed to allocate costs to specific tasks and deliverables, allowing for accurate tracking of expenditures throughout the project lifecycle. By using project management tools like Microsoft Teams, SharePoint, and JIRA, we will monitor real-time cost data, providing visibility into resource allocation and ensuring we remain within budget.

Additionally, we will conduct monthly financial reviews to compare actual costs against budgeted amounts, identifying any variances early and taking corrective action where necessary. Cost-saving measures, such as optimizing resource utilization and streamlining processes, will be implemented to maintain efficiency without compromising quality. Regular communication with HHS stakeholders, including monthly financial reports and updates during status meetings, will keep all parties informed of the project's financial health, ensuring alignment with budgetary goals and avoiding any potential cost overruns.

## B.9 Quality Assurance Surveillance Plan (QASP) Monitoring

Team Stealth will implement a comprehensive Quality Assurance (QA) monitoring plan to ensure that all project deliverables meet HHS's stringent requirements. Our approach focuses on integrating quality



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assurance into every phase of the project lifecycle, from planning and development to testing and final deployment. Key performance metrics and standards will be defined for each task, with ongoing evaluations to track adherence to these benchmarks.

For detailed information on how Team Stealth plans to monitor quality assurance throughout the project, please refer to the draft Quality Assurance Surveillance Plan (QASP) in Appendix B, which will be finalized upon contract award.

## C. Personnel Plan

### C.1 Proposed Personnel/Staffing Plan (Factor 1-C)

The personnel assigned to this project have been carefully selected based on their qualifications, and experience, ensuring their ability to deliver high-quality Salesforce services that meet the technical requirements outlined in the Statement of Work (SOW). The following section details the key personnel proposed, their roles, and their qualifications, followed by a breakdown of personnel hours by task. **Exhibit 4** below shows the proposed personnel and **Exhibit 5** shows hours for each of the personnel.

**Exhibit 4: Proposed Staffing**

Personnel	Role	Qualifications	Education
Venkat Anuraag Bahudodda - Subcontractor from REI	<b>Salesforce Administrator (0.9 FTE).</b> For details on responsibilities and types of work, refer to the section 'B.2 Personnel Management' above.	<ul style="list-style-type: none"><li>- Salesforce Administrator Certified with 8 years of experience as a Salesforce CRM, Sales Cloud, Service Cloud, Marketing Cloud and Force.com platform Business Analyst, Administrator, Developer, and Consultant.</li><li>- Proficiency in SFDC Administrative tasks like creating Profiles, Roles &amp; Users.</li><li>- Manage end-to-end project delivery.</li></ul>	Masters in science and information systems
Sudhanshu Satia - Subcontractor from REI	<b>Project Manager (0.35 FTE).</b> For details on responsibilities and types of work, refer to the section 'B.2 Personnel Management' above.	<ul style="list-style-type: none"><li>- 17+ years of Professional experience in software development life cycle.</li><li>- Skilled in Agile and Waterfall methodologies.</li><li>- Led cross-functional teams to ensure seamless communication and project alignment.</li></ul>	Masters in computer applications
Preetika Soni - From Prime Stealth	<b>Salesforce developer (0.47 FTE).</b> For details on responsibilities and type of work see the section above.	<ul style="list-style-type: none"><li>- Salesforce Platform Developer I &amp; II Certified with 7 years of experience in Salesforce development.</li><li>- Expertise in customization, data integration, data Migration, and API management.</li><li>- Experience in Development, Administration, Configuration, Implementation, and Support of Salesforce CRM.</li></ul>	Bachelors degree in electrical engineering



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Personnel	Role	Qualifications	Education
		<ul style="list-style-type: none"> <li>- Proficient Knowledge in Salesforce Lightning UI, Lightning programming, and Aura framework programming.</li> </ul>	
<b>Siva Giri Narasimha Naidu Pothini - From Prime Stealth</b>	<b>Salesforce Developer (Full-Time). For details on responsibilities and type of work see the section above.</b>	<ul style="list-style-type: none"> <li>- Salesforce Platform Developer I-Certified with 14 years of development experience.</li> <li>- Expertise in Salesforce CRM, Lightning application, Apex Custom Controllers, Apex Classes, Triggers, and Visualforce Pages.</li> <li>- Experience developing Lightning Application, Lightning Web Components, Lightning Aura Components</li> <li>- Extensive experience in SFDC design and development of Apex Classes, Controllers, Triggers, and Visualforce Pages.</li> </ul>	Masters in Computer Science

#### Exhibit 5: \* Personnel Hours Allocation by Task

Personnel / Hours	Task 1 to Task 6 hours for Base Year						Year 5 Only	Total Hours
	Task 1	Task	Task 3	Task 4	Task 5	Task 6		
Project Manager	544	7	14	14	102	TBD	120	800
Salesforce Administrator	35	00	1091	458	176	TBD	80	1,840
Salesforce Developer	56	533	99	1,244	59	TBD	84	2,075
Salesforce Developer	00	228	42	533	25	TBD	38	865
Total Hours	636	768	1,246	2,248	363	TBD	320	5,580

\*Please note that the hours listed for Tasks 1 through 6 apply to the base year and are expected to remain consistent in subsequent years with the same resource mix. The hours for Task 7 are only applicable to the final year (Year 5). Refer to Appendix A for the resumes of proposed personnel and letters of commitment.

Team Stealth includes resumes and letters of commitment for proposed staff in Appendix A.

#### D. Quality Assurance Surveillance Plan (QASP)

Team Stealth's Quality Assurance Surveillance Plan (QASP) outlines the approach for monitoring the performance of all tasks to meet HHS's standards in the Salesforce Professional Support Services project. Our QASP ensures comprehensive government surveillance over project activities, specifying the methods and tools used to track performance and quality control for each deliverable. The plan establishes expected accuracy levels, detailing performance metrics and compliance standards to be met across all



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tasks. Regular performance assessments and corrective action measures are incorporated to ensure that we meet or exceed HHS's expectations.

A detailed draft of QASP is included in **Appendix B**, which addresses government surveillance and defines accuracy requirements for each task. The plan will be revised and finalized upon contract award to fully align with the project's goals and specific needs.

## E. Section 508 Compliance

### **Section 508 Compliance Statement:**

Team Stealth is dedicated to maintaining full compliance with Section 508 of the Rehabilitation Act (Section H.17) throughout the entire lifecycle of the Salesforce Professional Support Services project for the U.S. Department of Health and Human Services (HHS).

*Team Stealth is fully capable of complying with Section 508 of the Rehabilitation Act (Section H.17) throughout the performance of this contract.*

Our approach integrates Section 508 compliance at every phase, from planning and development to deployment, maintenance, and user support.

We prioritize accessibility by engaging stakeholders early, including HHS and accessibility experts, to define specific requirements. Accessibility is embedded into all project deliverables, and clear compliance benchmarks, such as WCAG 2.1 Level AA standards, will be established.

During design and development, we will apply accessible design principles, including color contrast, keyboard navigation, and support for assistive technologies. We will leverage Salesforce's built-in accessibility features and ensure that all custom development follows Salesforce's accessibility guidelines. Regular accessibility reviews using tools like Axe or WAVE will be performed throughout the development phase.

In testing and quality assurance, we will combine automated tools with manual testing, using assistive technologies like JAWS or NVDA. Test results will be documented and shared with HHS. Post-deployment, we will conduct periodic accessibility audits to maintain ongoing compliance, addressing any new issues that arise from platform updates or feature enhancements.

*An Accessibility Conformance Report (ACR) examples are included in Appendix C.*

## Appendix A – Proposed Personnel Resume and Commitment Letters

### Resumes

#### Venkat Anuraag Bahudodda *Salesforce Administrator*

##### Summary

- Around 8 years of experience as a Salesforce CRM, Sales Cloud, Service Cloud, Marketing Cloud and Force.com platform Business Analyst, Administrator, Developer and Consultant.
- Implemented customizations using Apex controller classes Custom, Extension, Triggers and Visualforce pages, Reports, Force.com IDE, Eclipse with SOQL, SOSL and Force.com plug-in.
- Experienced using Salesforce Lightning UI. Created Lightning Apps combining Lightning Design System, Lightning App Builder and Lightning Component features.
- Hands on experience in developing and configuring OmniStudio components such as FlexCards, OmniScripts, DataRaptors, and Integration Procedures.
- Upgraded some Apps from Salesforce Classic to Lightning Experience to develop a rich user interface and better interaction of pages.
- Involved in two end to end product implementations.
- Enabled Aura Framework, by adding Aura Attributes and Aura Handlers for Events to focus on Logic and Interactions in Lightning Applications.
- Minimized code in JavaScript Controllers by adding reusable functions in Helper Component. Updated the APEX Controller and Helper functions regularly making the Component Context Aware as per business requirement.
- Comprehensive understanding of CRM business processes like Campaign Management, Lead Management, Account Management, Opportunity Management, Case Management.
- Expertise in performing the administrative and development related tasks like consigning Roles, creating Profiles, Visualforce pages, Validation Rules, Users, Custom Reports, Workflows, Email Alerts, Entity Relationship Diagrams and Page Layouts.
- Good insight into the Health and Financial Domain.
- Proficient in dealing with the functionalities related to the Service cloud and Sales cloud.
- Thorough knowledge in the security and sharing model which is used to finely control the user's access to different data.
- Proficiency in SFDC Administrative tasks like creating Profiles, Roles, Users, Page Layouts, Email Services, Approvals, Reports, Dashboards, Actions, Tasks and Events. Extensive experience in lead, case management, web-to-lead, Web-to-case, Email-to-case.
- Good experience in working on VS code, Eclipse IDE with Force.com Plug-in for writing business logic in Apex programming language, LWC, AURA.
- Proficiency in installing App Exchange applications.
- Created lookup and master-detail relationships on the objects and created junction objects and various advanced fields like Picklist, Field Dependencies, Custom Formula, Approval Process, Sharing rules for automated alerts, field updates and Email generation.
- Effective employment of Apex Data Loader, Import Wizard and Data Manipulation Language for data migration and management in bulk.



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- Experience in web technologies like HTML, XML, JSP, JavaScript, SOAP Web services, and WSDL.
- Work well alone and as part of a team with excellent troubleshooting mechanisms and highly adaptable to different work environments.

## Skills

- **Salesforce Development:** Apex Language, Lightening Framework, LWC, OmniStudio, Apex Trigger, Apex Class & Web Services, SOQL, SOSL, Visual Force (Page, Component & Controllers), Batch Apex, Schedulable Apex.
- **Salesforce Administration:** Reports, Dashboards, Flexcards, Omniscripts, Dataraptors, Integration Procedures, Validation Rules, Journey Builder, Email Studio, Automation Studio, Content Builder, Users, Roles and Profiles Deployments (Change sets), Workflow Rules, Approval Process, Sandbox Refreshments Packages, Custom Apps, Custom Labels, Portals (Customer and partner), Sharing Settings, Communication Templates.
- **Data migration skills and Tools:** MS-SQL, Apex Data Loader, Import Wizard, SFDC Data Export, Mass Delete, Workbench, Eclipse, Force.com Eclipse IDE, VS Code, IntelliJ, Bitbucket .
- **Application Integrations:** REST API, SOAP API
- **Languages:** C#, ASP.NET Core, Apex, JAVA, C, R
- **Web Technologies:** JAVASCRIPT, HTML5, CSS3, ANGULAR 7.0, TypeScript 2.0
- **Office Tools:** MS Office
- **Operating Systems:** All versions of Windows, IOS

**Certifications:** 9 X Certified.

## Qualification

- Amrita University – Bachelor of Technology in Electrical and Electronics Engineering (Bangalore, India)
- Stevens Institute of Technology – Master of Science in Information Systems (Hoboken, New Jersey)

## Professional Experience

**REI Systems Inc** **Oct 2017 - Present**

*Sr Salesforce Developer*

**Project – PIMS** **Nov 2022 - Present**

Key responsibilities include:

- Developed and maintained custom solutions on Salesforce Lightning platform using OmniStudio, Apex, LWC, AURA Components.
- Implemented OmniStudio tools Flex Cards, Omniscripts, Data raptors, IPs to streamline complex business processes, enhancing customer engagement and operational efficiency.
- Created multiple Lightning Components, added CSS and Design Parameters that makes the Lightning component look and feel better.



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- Leveraged APEX Controller to make a call for external requests to retrieve data from various API's and displayed them on to the component.
- Created modern Enterprise Lightning Apps combining Lightning Design System, Lightning App Builder and Lightning Component features.
- Experience in APEX Programming by creating Custom Triggers and perform Asynchronous calls to implement the business logic as per the requirements.
- Used field level security along with page layouts in Lightning to manage access to certain fields.
- Visualforce Pages for Lightning Experience, Alternates for Java Script Codes, Sharing Visualforce pages between Classic and Lightning.
- Used SOQL and SOSL statements within Governor Limits for data manipulation needs of the application using platform database objects.
- Enabled Aura Framework, by adding Aura Attributes and Aura Handlers for Events to focus on Logic and Interactions in Lightning Applications.
- Scheduled Apex Batch jobs for processing large records.
- Implementation of custom Approval Processes, to allow user to be able to approve associations between objects.
- Integrate Salesforce with 3-rd party services using APIs

Environment: Salesforce.com Platform, Force.com, OmniStudio, Lightning Experience, Lightning Components, Apex classes and Controllers, LWC, HTML, CSS, Data Loader, SOQL, SOSL, Scrum, Custom objects, Custom fields, Web Services, REST, VS Code

#### Project - UDS

Mar 2019 – Nov 2022

- Followed Agile Methodology, responsible for gathering the requirements by coordinating with the business analysts and Project Managers to better customize, and/or develop a solution.
- Supported business needs with technical design documentation.
- Administered incident response and break-fix systems.
- Designed and documented relevant system code and configurations.
- Interacted with testing teams for the development and testing of the code.
- Designed, and developed Apex Classes, Controller Classes, extensions, and Apex Triggers for various functional needs in the application.
- Written test classes to achieve 80% overall code coverage.
- Created multiple Lightning Components, added CSS and Design Parameters that makes the Lightning component look and feel better.
- Retrieved some data and its functionality from Third-Party API's and displayed within the lightning component.
- Creating Custom Apps, Custom fields, Profiles, Applying Sharing Rules, Handling Page Layouts, Search Layouts, and Related List and defining Field Dependencies, custom buttons, Validation Rules, workflows, approval processes.
- Worked effectively to ensure that the data is protected and is made available to the authorized users by customizing the user Roles, Role hierarchies, Profiles and Sharing settings and Permission Sets.
- Created Workflow Rules to automate Tasks, Email Alerts, Field Updates, time-dependent actions, and Outbound API Messages.
- Created Reports and Dashboards to track Opportunity pipeline/Stages for Management visibility.
- Developed Visualforce pages and improved the UI with JavaScript and CSS.
- Responsible for all the activities related to configuring Data Loader, uploading data in CSV files into salesforce.com, checking for the correctness of the data.



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- Provided ongoing SalesForce.com maintenance and administration services including periodic data cleansing, custom objects, workflow.
- Used the Full Copy Sandbox for testing and migrated the code to the deployment instance after testing.
- Developed various workflow rules and email templates for auto responses to customers.
- Used SOQL & SOSL with consideration to Governor Limits for data manipulation needs of the application using platform database objects.

Environment: Salesforce.com Platform, Force.com, Lightning Experience, Service Cloud, Lightning Components, Apex classes and Controllers, LWC, HTML, CSS , Data Loader, SOQL, SOSL, Scrum, Custom objects, Custom fields, Web Services, SOAP, REST, IntelliJIDEA.

#### Project - EGMS

Oct 2017- Mar 2019

- Developed and implemented budget grids for grants management.
- Refactored APEX code to optimize trigger-based transactions for performance and speed with governor limits.
- Improved unit test code coverage by 15% across the application using generic classes.
- Created multiple Lightning Components, added CSS and Design Parameters that makes the Lightning component look and feel better.
- Retrieved some data and its functionality from Third-Party API's and displayed within the lightning component.
- Creating Custom Apps, Custom fields, Profiles, Applying Sharing Rules, Handling Page Layouts, Search Layouts, and Related List and defining Field Dependencies, custom buttons, Validation Rules, workflows, approval processes.
- Developed Visualforce pages and improved the UI with JavaScript and CSS.
- Developed various workflow rules and email templates for auto responses to customers.
- Written hundreds of SOSL & SOQL queries to obtain data from Salesforce.com database.

Environment: Salesforce.com Platform, Force.com, Lightning Experience, Lightning Components, Apex classes and Controllers, LWC, HTML, CSS, Data Loader, WSDL, SOQL, SOSL, Scrum, Custom objects, Custom fields, Approval Process, Web Services, **SOAP, REST, MavensMate, IntelliJIDEA, Eclipse IDE with Force.com plugin.**

#### Best Brains Inc

Oct 2014 – Jul 2015

*Salesforce Developer*

Key responsibilities include:

- Developed Apex Triggers, Apex Classes and Visualforce pages with various customizations requested by business users.
- Written SOQL, SOSL for data manipulation needs of the application using platform database objects.
- Developed VisualForce pages with Javascript and Apex classes.
- Used Force.com IDE for developing apex classes, triggers, Visualforce pages, objects and validation rules.
- Created relationships among objects with Lookup, Self, Master-detail relationship and used Junction object for many-to-many relationships.



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- Used Data Loader to perform CURD operations and bulk import or export of data from Salesforce.com to files and vice-versa using comma separated values CSV files.
- Integrated Salesforce with Informatica on Demand for the proper mappings and extraction and transformation of data.
- Created various reports summary reports, matrix reports, pie charts and dashboards and Report Folders to assist managers to better utilize Salesforce.
- Created workflow rules and defined actions like Tasks, Time-Dependent actions, Email Alerts and Field Updates to implement business logic.
- Administration experience in creating roles, profiles, user accounts, permission sets and assigned to different roles to users.
- Written triggers to process inbound emails from customers to automatically create new Case records.
- Migrated components across various other SDLC environments like QA, UAT and Production environments using Force.com Migration tools, change set and work bench.
- Implemented Salesforce.com dashboards as per business requirements.
- Involved in SFDC application support for end users.
- Environment: Salesforce.com Platform, Sales Cloud, Service Cloud, Apex, Triggers, Visualforce, JavaScript, CSS, Data loader, Workflows, Approvals, Custom Objects, Tabs, Page Layouts, CSS, HTML, Java Script, Reports, Dashboards, Eclipse IDE Plug-in, Windows.



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## Sudhanshu Satia

*Project Manager*

### Summary

- 17+ years of Professional experience in software development life cycle.
- 9+ years' experience as Technical Lead/Product Manager/Project Manager
- 11+ years' experience as Full stack developer
- Experienced in developing and executing product strategy and roadmap in alignment with business objectives.
- Expert in managing product roadmaps, feature prioritization, and end-to-end project lifecycles.
- Skilled in Agile and Waterfall methodologies, with a focus on optimizing processes and driving efficiency.
- Manage end-to-end project delivery, ensuring timely and within-budget execution.
- Collaborate with stakeholders to gather requirements and design custom solutions.
- Led cross-functional teams to ensure seamless communication and project alignment.
- Prioritize features and enhancements to balance short-term needs with long-term goals.
- Oversee budget management, resource allocation, and vendor relationships.
- Provide user support, training, and change management for successful system adoption
- Monitor key performance metrics, driving continuous product improvements and innovations.
- Lead the design and launch of new products and enhancements, improving user experience and market fit.
- Strong troubleshooting and analysis skills to identify, isolate, and resolve issues and ability to adapt to new technologies, along with good communication and interpersonal skills.
- Worked on VB, ASP.Net 1.1, 2.0, 4.5, MVC, ASP.Net Core, Angular 2/7/8 C#, ADO.NET, SQL SERVER, SQL, T-SQL and PL/SQL
- Knowledge of RDBMS Concepts, Database Programming, and creation of Stored Procedures, Views & Functions.
- A capable, enthusiastic, highly motivated person with sound qualifications in Computer Science with strong Analytical, Coding, and Debugging abilities.
- Self-motivated, committed & focused person with the ability to work independently with little guidance or as part of an integrated team.

### Skills

- **Product Management:** Product Roadmap Development, Product Lifecycle Management, Feature Prioritization & Backlog Management, User Experience (UX) Design Collaboration
- **Project Management:** Agile & Waterfall Methodologies, Project Planning & Execution, Risk Management & Mitigation, Budgeting & Resource Allocation, Stakeholder Communication & Management, Timeline & Milestone Tracking, Change Management
- **Business & Technical Skills:** Requirements Gathering & Analysis, Process Optimization & Automation, Cross-Functional Team Leadership, Vendor & Partner Management
- **Tools & Technologies:** Salesforce (Admin, Configuration, and Management), Omni Studio, Flex Cards, JIRA, TFS, GIT, Microsoft Project, Slack, Microsoft Teams, Net 1.1, 2.0, 3.5, 4.5 ADO.Net, .net core



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- SQL Server 2000/2005/2008/2012, Angular, Visual Studio 2003/Visual Studio 2005/ Visual Studio 2010/Visual Studio 2013/Visual Studio 2015, Visual Interdev, VB 6.0, ASP, ASP.Net, HTML, CSS, Java Script, VB Script XML, All Versions of Windows and IOS
- **Soft Skills:** Leadership & Team Management, Strategic Thinking & Problem Solving, Communication & Negotiation, Adaptability & Time Management, Analytical & Critical Thinking

## Qualification

- **MCA (Master in Computer Applications)** from M.D. University, Rohtak – July 2003
- Post Graduate Diploma in Business Administration from G.J. University, Hissar - July 2008
- **B.Sc. in Computer Application** from Kurukshetra University, Kurukshetra – May 2000

## Professional Experience

<b>REI Systems, Virginia,</b>	<b>Oct. 2011–Present</b>
<i>Product/Project Manager</i>	<i>Jun. 2021–Present</i>
Project: Salesforce DCP	

The Salesforce Data Collection Platform is a key modernization initiative, marking its first low-code/no-code implementation for HRSA. As part of this initiative, 20 programs from the Performance Improvement Management System, originally built on .NET technology, have been redeveloped using Salesforce technology.

Key responsibilities include:

- Define and execute the Salesforce product strategy in alignment with business goals.
- Create and maintain a detailed product roadmap based on customer needs, market trends, and stakeholder input.
- Prioritize features and enhancements, balancing long-term goals with quick wins.
- Collaborate with cross-functional teams, including business stakeholders, developers, and Salesforce administrators, to gather requirements and feedback.
- Facilitate communication between technical and non-technical stakeholders to ensure clarity and alignment on project scope and deliverables
- Oversee end-to-end Salesforce implementation and enhancement projects from initiation to completion.
- Lead project planning, resource allocation, risk management, and execution of project deliverables on time and within budget.
- Ensure adherence to Agile or Waterfall methodologies, depending on project requirements.
- Develop and execute change management strategies to ensure smooth adoption of Salesforce products and updates across the organization.
- Create and deliver user training sessions, materials, and documentation to support end users and drive system adoption.
- Manage the product/project budget, tracking expenses, and ensuring that all financial aspects are within budgetary constraints.



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- Provide regular financial updates and reports to stakeholders.
- Provide ongoing support to Salesforce users, troubleshooting issues, and addressing system bugs.
- Identify project risks early and develop mitigation strategies to minimize impact on timelines and objectives.

### **EHBs (Electronic Handbooks)**

**Dec 2015–May 2021**

#### *Project Lead*

Health Resources and Services Administration is a primary federal health resources and services administration agency of the US Department of Health and Human Services. EHB is the enterprise handbook which automates the grants management process. Grants Management life cycle has various phases like Application, Post Award, Award, Pre-Award. It involves various roles like PO, GMO, GMS, QC etc. EHB is the name of a system that has systems/program specific system for various grant management process.

- Developed comprehensive project plans, timelines, and milestones to guide successful execution.
- Led project execution from initiation to completion, ensuring alignment with scope, schedule, and budget.
- Collaborated with stakeholders to gather requirements, provide updates, and manage expectations throughout the project lifecycle.
- Collaborated with stakeholders to gather requirements, provide updates, and manage expectations throughout the project lifecycle.
- Ensured that project deliverables met quality standards through regular reviews and testing.
- Evaluated and selected the appropriate technologies, frameworks, and tools for projects.
- Led and mentored development teams, guiding them on best practices, code quality, and technical solutions.
- Conducted regular code reviews to ensure coding standards, best practices, and quality are maintained.
- Identified technical risks and challenges early in the development process and implemented mitigation strategies.
- Monitored project performance and adjusted plans to maintain progress toward key milestones.
- Managed changes in project scope, timelines, or resources, ensuring smooth transitions and minimal disruption to the project.
- Facilitated change requests and assessed their impact on project deliverables and schedules.
- Acted as a liaison between the technical team and non-technical stakeholders, ensuring clarity and alignment.
- Worked with project managers to ensure resources are effectively allocated and risks are managed.
- Ensured that all solutions comply with security standards, data privacy regulations, and industry best practices.
- Managed relationships with external vendors and partners, ensuring the integration of third-party services or tools aligns with technical requirements.
- Coordinate with operations teams to ensure successful releases and monitor post-deployment performance.

### **EHBs (Electronic Handbooks)**

**Oct 2011–Nov 2015**

#### *Software Developer*

Health Resources and Services Administration is a primary federal health resources and services administration agency of the US Department of Health and Human Services. EHB is the enterprise handbook which automates the grants management process. Grants Management life cycle has various phases like Application, Post Award, Award, Pre-Award. It involves various roles like PO, GMO, GMS, QC etc. EHB is the name of system that has systems/program specific system for various grant management process.

- Attended the internal working sessions held by the team to completely understand the proposed solution concept under development.
- Worked with the BA and the requirements lead to help frame the draft solution concept on the user interface.
- Ensured that the pages/screens that are being proposed are compliant and consistent with HRSA EHB standards as well as section 508 requirements.
- Worked on backlog items by preparing the design and developing the ROMs.
- Developed the forms.
- Developed automated unit tests.
- Developed HTML templates for any forms that may be made available to the users through download.
- Implemented well structured, reusable, and extensible code following HRSA coding conventions.
- Developed the application as full stack developer using modern SPA languages like angular.
- Provided support to client for day-to-day business/technical questions.
- Discussed and coordinated with client during design and development.
- Attended team meetings to communicate project status and discussed new ideas and any issues.
- Provided training to other Software Engineers when required.
- Provide support in all phases of SDLC and ensure to deliver high-quality products.

**Solvent-C, Gurgaon, India**

**Aug 2004 – Mar 2007**

**eM-ERP (SC Solutions for Manufacturers)**

June 2006 – March 2007

eM-ERP was primarily an enterprise resource planning application for manufacturing business vertical. This project was primarily a redesign of an existing windows-based product called M-ERP. Along with redesign, M-ERP was converted into a web-based solution. eM-ERP was being used by manufacturers in various business processes. Some of the modules of these projects were Purchase Order Management Module, Inventory Management Module, Sales Invoice Module and Marketing Module

The Purchase Order Management module was being used to enter the orders which have been received from various clients. This module could export the purchase order from file as well. Inventory management module was used to track the inventory of finished product. This project was developed in ASP.NET 2.0 as front-end and SQL Server 2005 as back-end. I was a team member of the team responsible for developing Purchase Order Management Module & Inventory Management Module.

Key responsibilities include:

- Involved in the analysis, design, development, testing, documentation and customization of Purchase Order Management & Inventory Management modules using ASP.NET for user interface design and C# for implementing business logic, bundled as class libraries/assemblies
- Developed web pages using Master pages, Web server controls and User Controls.
- Implemented validations using ASP.NET Validation Controls on various web forms.
- Displayed list of purchase orders on a page using Asp.Net Grid View control and SQL Data Source.



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- Created User control to capture the address details.
- Worked on business logic layer & data layer. Worked on developing Database Stored Procedures, Functions, Views, and Triggers in T-SQL.
- Assisted in writing documentation for my modules.

#### EduSys

Oct 2005 - May 2006

EduSys was a course management system developed for Educational Institutions. This system had various modules like Profile Management, Fee Collection, Course Details, Transport System, Results and Timetable. I was a team member of the team responsible for developing Profile Management and Courses Details, and assisted Fee collection Module's team in implementing the business logic.

- Developed UI for persisting data pertaining to a user of the system by using various ASP.net controls.
- Developed the UI for persisting course related data into database.
- Implemented business validations on various web forms using ASP.NET custom validator.
- Developed the page to list all the users in the admin section of Profile Management.
- Created User control to show read only information of the User
- Created entities and business logic layer for Fee Collection and Profile Management module.
- Used ADO.NET objects Dataset, Data reader for fetching information from database.

#### e-FileStore

April 2005 -Sep 2005

This was a web-based file management system for storing documents online. The main modules of this system were User Management, File Groups Management & File Management.

This project was developed by team size of 3 people, and I have worked on File Groups Management & User Management.

- Developed the User interface for creating users who can upload the files.
- Developed the screens related to CRUD operations on file groups.
- Used JavaScript for client-side validations. Created store procedure in database for database operations.

#### M-ERP (Windows Application)

Aug 2004 -Mar 2005

M-ERP is primarily an Enterprise resource planning application for manufacturing business vertical. It was being used by manufacturers in various business processes. The modules of these projects were Purchase Management Module, Inventory Management Module, Sales Invoice Module and Marketing Module.

- Analysis of the existing business rules to understand the application
- Analysis and debugging of Issues reported by users.
- Worked on Bug fixing.
- Requirement/Design analysis for enhancements. Minor enhancements pertaining to user interface.
- Testing the issues.
- Created custom reports as per user requests. End to end follow up the issue from creating to closing

#### Softech Computers, Chandigarh, India

Aug 2003 – Jul 2004



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Worked as a faculty member and taught subjects like System Analysis & Design, Artificial Intelligence, Computer Graphics & various other subjects to Post Graduate / Graduate students.

**Tritech Corporation Ltd, Chandigarh, India**

**Jan 2003 – Jul 2003**

Network Management Tool

This tool was being used for tracing various issues in the network. This tool could find active clients & Inactive clients which are connected in network. It also shows the details of clients like machine name etc. This tool also had network packets sniffing capability. This project was developed as my post graduation course work in last semester.



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**Preetika Soni**  
*Salesforce Developer*

## **Summary**

Over 7 years of experience in Salesforce Administration and Development. Experience in Development, Administration, Configuration, Implementation and Support of Salesforce CRM based on Apex language and leveraging Force.com Platform. Proficient Knowledge in Salesforce Lightning UI, Lightning programming, Aura framework programming. Created various Lightning Apps combining Lightning Design System, Lightning App Builder and Lightning Component features. Worked extensively on Lightning component building, worked on many components to convert existing classic programming work like Visualforce into Lightning components. Experience in use of Standard and Custom controllers of Visualforce in development of custom Salesforce pages as expected by business requirements. Experience in working on web services and giving solutions by SOAP and REST integrations. Proficient knowledge of Governor limits. Experience in optimization of existing code in accordance to the governor limits. Participated in all stages of Software Development Life Cycle (SDLC) System Analysis, Design, Development and Testing Expertise. Strong Knowledge of SFDC standard Data structures and familiarity with designing Custom Objects and Force.com platform and Force.com Sites. Experienced in managing Accounts, Campaign, Contacts, Leads, Opportunities, Reports and Dashboards.

Proficiency in all Microsoft Office programs (Word, PowerPoint, Excel, and Access). Good organization skill and manage priorities based on requirements. Good experience in web related technology and managing web pages. Excellent skills in developing web pages using HTML, CSS and JavaScript. Proficiency in SFDC Administrative tasks like creating Profiles, Roles, Users, Page Layouts, Email Services, Approvals, Workflows, Reports, Dashboards, Actions, Tasks and Events. Experience in SFDC Development in implementing Apex classes, Triggers, Visual Force, Migration Tools, Force.com IDE, SOQL and SOSL. Experience in working with Salesforce.com sandbox and production environments.

Proficient in Data Migration from Traditional Applications to Salesforce using Import Wizard, Data Loader and other migration tools. Experienced in analyzing business requirements, Entity Relationship diagram and implementing them to Salesforce custom objects, Junction objects, master-detail relationships and lookup relationships. Good experience in lead, case management, Web-to-lead, Web-to-case, Email-to-case. Experience handling managed and unmanaged Salesforce packages.

## **Skills**

- Languages: Apex, Visualforce, HTML, SOQL,SOSL
- SFDC & Web Technologies Standard Objects, Workflow and Approvals, Data Loader, Reports and Dashboards, Force.com IDE, Force.com Platform (Sandbox and Production), XML, HTML 4/5, CSS, Ajax, Web Service
- Scripting Language : JavaScript
- CRM/Other Tools: SFDC, Force.com Data Loader, Heroku, Copado
- Database : SQL Server 2008/2012/2014
- Methodologies: Waterfall, Agile, SAFe, Scrum, SDLC



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RFQ: 75P00124Q00078

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## Qualification

- Bachelor's degree in Electrical Engineering.

## Certifications and Technology-Specific training

- Training and Internship in Salesforce Admin and Developer.
- Salesforce Certified Administrator (ADM 201).
- Salesforce Certified Platform App Builder.
- Salesforce Certified Platform Developer I (PD1).
- Salesforce Certified Platform Developer II (PD2).

## Professional Experience

### Stealth Solutions Inc.

Jan 2022 – Present

*Sr. Salesforce Administrator/Developer*

Key responsibilities include:

- Working as an enhancement team member and performing the roles of Salesforce.com, Administrator, Developer, and Release Engineer in the organization.
- Worked on various salesforce.com standard objects like Contacts, Cases, Opportunities, Accounts, Opportunity Line Items, Leads, Campaigns, Reports and Dashboards.
- Developed and configured various Custom Reports and Report Folders for different user profiles based on the needs of the organization.
- Involved in data mapping and data migration into SalesForce.com Objects and fields.
- Used Visual Studio Code for developing and deploying the Lightning Web Components.
- Analyzed Visualforce pages and made changes to work efficiently in classic and lightning modes.
- Implemented Lightning components.
- Experienced in process builder conversion & flows.
- Worked on integrations between Salesforce and external applications using oAuth and Single Sign-On.
- Responsible for design reviews, code reviews, walkthroughs, unit testing, and integration testing.
- Involved in End User training and demos.
- Performed requirements gathering and end user support.
- Responsible for Production support, weekly/monthly data and application backup.
- Involved in documenting all procedure related technical architecture, functional/non-functional requirements.
- Managing different sandboxes dev/uat/full/partial.
- Responsible for Data management, Case management, User management.



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### **Maximus, VA**

*Salesforce Developer/Administrator*

**Jun 2021 – Dec 2021**

Key responsibilities include:

Maximus Inc. is an American government services company, with global operations in countries. The company contracts with government agencies to provide services to manage and administer government-sponsored programs. It provides administration and other services for Medicaid, Medicare, health care reform, and welfare-to-work, among other government programs.

- Setup the integration with Microsoft® Outlook 2013.
- Link emails in Microsoft Outlooks to contacts, leads, accounts, opportunities, and cases in Salesforce.
- Analyzed the business process of client and then involved in creating the application and data model required for the requirement.
- Creates custom application, objects, tabs, fields with the custom functionality to efficiently meet the business requirement.
- Defined lookup and master-detail relationships on the objects and created junction objects to establish connectivity among objects.
- Customized page layouts for Case, Contacts, and Accounts depending upon user profiles and created permission sets where necessary.
- Worked on Assigning creating Roles Hierarchy, Profiles and Security setup within the organization.
- Developed custom Workflows and Assignment Rules for case escalation.
- Responsible for requirement gathering and project scoping for Service and Community Clouds.
- Involved in end-to-end testing and gathering feedback from business users

### **Humana, Illinois**

*Salesforce Developer*

**Feb 2020 – Jun 2021**

Key responsibilities include:

Humana is a health insurance company that provides a range of insurance options for individuals, families, and businesses. The company offers Medicare and Medicaid plans, as well as private health insurance plans. It also provides additional services such as prescription drug coverage, vision and dental insurance, and health savings accounts. Humana is based in Kentucky and is one of the largest Medicare insurance companies, offering health coverage in all 50 States.

- Implemented best practices for security, data governance, and compliance within the environment.
- Worked extensively with lightning process builder flows, Connect API, Chatter and quick Action.
- Managing Heroku and OwnBackup application.
- Developed Lightning components and Lightning apps to provide better and more interactive interfaces to end users, which help in sales enhancements.
- Salesforce deployment and release management from lower environments to higher environments using Copado.
- Used Lightning Process Builder to determine when to execute action groups, and immediate and scheduled actions to execute when those criteria are met.
- Worked on migrating changes from development to test to production environment(s) using CI/CD methodology like Azure Devops, JIRA



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- Setup, maintain and optimize Product management, Accounts, Opportunity and Pursuit Information Salesforce sales cloud
- Used Visual Studio Code for developing the Lightning Web Components.

**Beatcancer.org, PA**

*Salesforce Administrator/Developer*

**Mar 2019 – Feb 2020**

Key responsibilities include:

BeatCancer.org known as The Center for Advancement in Cancer Education provides research-based education on how to prevent and cope with it. They deliver cancer education by Educational materials for cancer prevention and control, Free individualized counseling for people battling cancer, Health Professional Training / Certification for Doctors and other Health Professionals, Public seminars and conferences for cancer prevention and control.

- Configured Identity Confirmation and Login Restrictions.
- Configured User Interface settings and configured the Company Profile.
- Customized Profiles and created custom fields.
- Used workflows to govern data flow across various objects. Set up Workflow and Workflow Approval processing.
- Performed data validation and use data utilities including Data Loader and Mass delete.
- Configured and used standard reports, custom reports and custom report types.
- Configured and used dashboards and dashboard components.
- Worked with standard objects, business processes and field-level security.
- Created/Modified Dependent Picklists, Lookup Fields, Formula Fields, Roll-up Summary Fields, Page Layouts and Record Types
- Set security and access rights using Organization Wide Defaults, Roles & Roles
- Hierarchies, Sharing Rules, Public Groups, and Sales teams, Account teams, Case teams and Folders.
- Set up Salesforce Console functionality and navigation.
- Configured custom objects, applications and tabs
- Installed/Uninstalled packages from AppExchange.
- Added custom fields and validations to new and existing objects and added custom functionality using custom controllers and custom extensions.
- Designed and developed User Interfaces for Salesforce users as per requirements installments.
- Worked on complex formula fields, workflows and Validation Rules.
- Develop and customize Salesforce application using Apex, Visualforce, JavaScript, SOAP and REST Web Services

**Volunteer Loudoun, VA**

*Salesforce Administrator*

**Aug 2017 – Feb 2019**

Key responsibilities include:

- Involved in supporting the implementation of Salesforce and administration of the same.
- Created various Custom Objects, Custom Labels, Validation rules, Record types, Custom Tabs, Workflow rule / approval process including Field updates, email alerts.



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- Composed and defined various Custom Reports, dashboards and Report Folders for different profiles based on volunteer Loudoun opportunities.
- Created new customized lead generating features like web to lead and email to lead.
- Linking of custom feedback pages to the corresponding course feedback related lists and automated email alerts to the department instructor/supervisor regarding the same, to effectively improve the learning process and handle any queries.



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## Siva Giri Narasimha Naidu Pothini

*Salesforce Developer*

### Summary

Over 14 years of experience on salesforce.com platform. Expertise in Salesforce Lightning framework. Experience in Administration, Configuration, and Implementation on the Salesforce Platform. Experience in Salesforce Sales cloud, Service cloud, and Marketing clouds. Experience in configuring Salesforce.com Standard Objects including Accounts, Contacts, Leads, Opportunities, Cases, Products, Campaigns, and Page Layouts. Involved in various stages of the Software Development Life Cycle including analysis, requirement engineering, design, development, deployment, and maintenance of stand-alone, web-based, and portal-based applications. Extensive experience in SFDC design and development of Apex Classes, Controllers, Triggers, Visualforce Pages as well as Salesforce.com API. Experience developing Lightning Application, Lightning Web Components, and Lightning Aura Components. Hands-on working experience in Role Hierarchy, Custom Profiles, and User Management. Skilled at generating and customizing Salesforce.com Reports and Dashboards. Experience implementing SOQL and SOSL in Apex Classes and Triggers. Strong understanding of Governor Limits and following Best Practices to develop applications to run within the limitations of the Salesforce platform. Experience using CI/CD tools like Jenkins and Bamboo.

Experience with salesforce.com APIs Force.com REST and SOAP Web Service APIs, Bulk and Metadata API. Experience writing complex Formula fields and Validation rules as per Business use cases. Proficient with Workflows and Approval processes, Data Validation. Worked on Lightning Process Builder flows. Experience working on Integration Methodologies, Trigger Framework, Recursive Triggers, and Asynchronous framework. Hands-on experience of Role Hierarchy, Custom Profiles and User Management. Migrated large volumes of external data to salesforce.com using data-loader and Jitterbit. Experience deploying Salesforce.com applications across various environments using Change Sets, Force.com IDE, and Force.com Migration tools.

Strong knowledge in AppExchange applications and integrating third party applications. Worked in Agile Methodology, waterfall model and Scrum Methodology. Expertise using Visual Studio Code and extensions to design and develop lightning applications.

### Skills

- Salesforce: Salesforce CRM, Lightning Application, Apex Custom Controllers, Apex Classes, Triggers, Visualforce Pages, Web Services, SOQL, SOSL, Flows, Reports and Dashboards, Managed and unmanaged packages.
- Salesforce Tools: Eclipse, Force.com Explorer, Force.com Import Wizard.
- Integration Tools: Apex Data Loader, Import Wizard, Data Export.
- Languages: Apex, Java, SQL, SOQL, SOSL.
- Web Technologies: HTML, XML, CSS, JavaScript, jQuery, Angular, SOAP and REST API.
- Databases: SQL Server, Oracle, MS Access, Postgres, DB2



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## Qualification

- Masters in computer science, May 2010. Western Illinois University, Macomb, IL. Graduated with a GPA of 3.36 on a 4.0 scale.
- Bachelors in information technology, May 2008. Jawaharlal Nehru Technological University, India.

## Certifications

- Salesforce Certified Platform Developer I

## Professional Experience

**Stealth Solutions Inc.**  
*Salesforce Consultant*

**Aug 2023 – Present**

Key responsibilities include:

- Interacted with various business user groups for gathering the requirements for salesforce implementation and documented the Business and Software requirements.
- Performed detailed analysis of business and technical requirements and designed the solution by customizing various salesforce applications.
- Analyzed business needs and identified gaps between business needs and standard application functionality, designed and document solutions to fill the gaps.
- Streamlined the process of deactivating inactive users to release the licenses.
- Analyzed and documented business process and instituted new salesforce feature functionalities.
- Successfully integrated Salesforce with multiple legacy systems, extending the platforms capacity and usability without sacrificing security or performance.
- Provided critical support in troubleshooting software issues, including salesforce integration errors.
- Involved in user training sessions to bring users up to speed on the developed salesforce applications.
- Worked on developing and configuring enhancements on existing applications.
- Performed End to End user testing on all the applications to ensure software works as intended.
- Performed user acceptance testing (UAT) before deploying code and configuration changes to production instance.
- Implemented single sign on (SSO) using login.gov.
- Developed application to load data into salesforce by uploading a CSV file.
- Created various reports and report folders to assist better utilization of salesforce tools based on the need in the organization.
- Evaluated data to generate weekly data-based reports to provide key insights to the clients.
- Performed administrative tasks like Data management, User management and Case management.
- Worked on developing business solutions by configuring salesforce objects, developing workflows, validations, flows and triggers.
- Performed sandbox refreshes, created and managed sandbox for development and testing.

**Nic Info Tek Inc.**  
*Senior Salesforce Developer*

**June 2022 – June 2023**

Key responsibilities include:



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- Worked with a team of 4 developers and QAs to migrate a JAVA application to Salesforce.com.
- Designed and Developed modules for an existing JAVA application as Proof of Concept on Salesforce.com.
- In-charge of all salesforce activities and worked with Cross-functional teams, identifying business requirements, and supporting existing applications.
- Involved in Administration, Configuring, Implementation, Lightning, and support experience with Salesforce Platform.
- Involved in Salesforce Customization, Security Access, Workflow Approvals, Data Validation, data utilities, and Support Administration.
- Expertise in SFDC Development using Lightning Applications, Apex Language, Visual Force Pages, Classes, Controllers, Triggers, Components, Tabs, Apex Web Services, Custom Objects, Reports, Snapshots and Dashboards, Profiles, Creating Roles, Page Layouts, Sharing Rules, Workflows.
- Developed lightning web components with Component and Application events.
- Ensured data integrity through the appropriate use of loading and exporting tools for bulk data using Data Loader and Informatica.
- Enabled Aura Framework, by adding Aura Attributes and Aura Handlers for Events to focus on Logic and Interactions in Lightning Applications.
- Worked with Force.com developer toolkit – Apex, Visualforce, Force.com Migration Tool, SOQL & Metadata APIs.
- Built Custom Lightning App Home Pages, App Pages, and Record Pages.
- Created Profiles, Permission Sets and Roles for ensuring record security in the organization.
- Worked in Agile & Scrum methodologies and involved in spring planning and backlog grooming.
- Developed reusable Salesforce Aura Lightning Components and Lightning Web Components.
- Performed detailed Test Case Designs and executed tests based on application functionality.
- Used source control and CI/CD tools like Bamboo and GIT.
- Involved in troubleshooting PROD issues and bug fixes.
- Used Salesforce deployment methodologies including Change Sets, Force.com Plug-in environment, ANT Migration tool kit.
- Involved in processing large volumes of project applications using business rules.
- Used GridBuddy package to provide users with flexibility to perform edits on multiple records on a single page.
- Used Congo Composer to generate build of material documents for projects.
- Developed Mass E-mail methods to send multiple documents with a single click.

**OpenText Inc, Hewlett Packard & Company**  
*Application Designer/Salesforce Developer*

**April 2013 – April 2022**

Key responsibilities include:

- Created modern Enterprise Lightning Applications combining Lightning Design System, Lightning App Builder and Lightning Component Features.
- Worked in Cross-functional teams, identifying business requirements, and supporting sales efforts.
- Worked on Apex Programming, Lightning experience, custom controls, Lightning Web components, Aura Components, Controllers, Triggers, Platform Events, and Process Builder.
- Enabled Aura Framework, by adding Aura Attributes and Aura Handlers for Events to focus on Logic and Interactions in Lightning Applications.
- Worked with Force.com developer toolkit – Apex, Visualforce, Force.com Migration Tool, SOQL & Metadata APIs.



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- Dealt with functionalities related to salesforce.com Sales and Service cloud.
- Built Custom Lightning App Home Pages, App Pages, and Record Pages.
- Worked in Agile methodology, Scrum methodology, Waterfall model and Test-Driven development.
- Developed reusable Salesforce Aura Lightning Components.
- Created and Managed changes to the System like modifying the existing system to increase usability by creating Advanced Visual Flows, Process Builder, Escalation Rules and Assignment Rules.
- Used salesforce API integration for applications residing on various platforms.
- Performed detailed test case design and executed tests based on application functionality.
- Used Change Sets, Force.com IDE to deploy the components from development organization to staging and then to production.
- Hands-on experience with Tools like Data Loader, Workbench and Postman.
- Worked on Salesforce APIs and Web Services (REST and SOAP).
- Used source control and CI/CD tools like Jenkins, SVN.
- Implemented packages in distributing and migrating components or applications within the organization.
- Integrated Zuora application with salesforce for managing HP Relate package purchase.
- Developed Batch classes, Scheduled Apex, HTTP Callout, Dynamic Apex, Single E-mail methods, mass e-mail methods, test classes, wrapper classes.
- Added new components to provide additional functionality to the HP Relate Managed package.
- Used sandbox for testing, created, managed packages, and migrated them between sandboxes and production environments.

**SysIntelli Inc**  
*Salesforce Developer*

**Nov 2011 – April 2013**

Key responsibilities include:

- Involved in requirements gathering, to better customize, and utilize the full functionality of the Salesforce.com CRM solution.
- Involved in gathering and converting User Requirements into Business Requirements and Functional Requirement Specifications
- Moved the tables like Opportunities, Accounts and Contacts to the Salesforce CRM Standard objects.
- Worked on maintaining the functional areas of Person Accounts, leads, campaigns, opportunities, activities, reports, and dashboards.
- Designed, developed, and deployed Custom objects, Page layouts, Custom tabs, Components.
- Written complex SOQL queries against force.com API.
- Used Force.com Eclipse IDE plug to develop the classes, Triggers and Visualforce pages.
- Developed different Visual Force Pages to suit the needs of the application using different Visual force components.
- Developed custom reports using Visualforce pages.
- Using Apex Data Loader mapped data sources and loaded data into Salesforce environments.
- Implemented packages in distributing and migrating components or applications within the organization.
- Involved in migrating data into salesforce application using Apex Data Loader through CSV files.
- Designed, developed, and deployed Apex Classes, Components, Controller Classes and Apex Triggers for various functional needs in the application.
- Coded APEX triggers and created rule based automated workflows.



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- Created Formula Fields, Validation Rules, Workflow and approvals for the flexibility and functionality of force platform application.
- Manage users, Public Groups, Profiles, and Roles within the Salesforce CRM, this involved designating access to the applicable user within the user hierarchy.
- Used the sandbox for testing and migrated the code to the deployment instance after testing.

**ENT Matrix Inc**  
*Salesforce Developer*

**Aug 2010 – Oct 2011**

Key responsibilities include:

- Implemented the requirements on Salesforce.com platform and Force.com IDE Plug-in using Eclipse.
- Worked with various salesforce.com objects like Accounts, Contacts, Leads, Opportunities, Reports and Dashboards.
- Designed, developed, and deployed the Custom objects, Page layouts, Custom tabs, Components, Visualforce Pages to suit to the needs of the application.
- Developed and configured various Custom Reports and Report Folders for different user profiles based on the need in the organization.
- Developed Custom Objects, Custom Reports and configured the Analytic Snapshots to dump the data on regular basis for the sales performance and lead generation statistics.
- Customization experience with writing Triggers on Salesforce.com
- Developed and deployed workflows and approval processes for opportunities (Sales Plans) and products / assets management.
- Implementing Salesforce.com Outbound Messaging.
- Created and used Email templates in HTML and Visualforce.
- Integrated the web services by generating the necessary stubs from the WSDL files for extracting the data from the home-grown applications by using the home-grown web services.
- Used the sandbox for testing and migrated the code to the deployment instance after testing.



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## Commitment Letters

### Commitment Letter – Venkat Anuraag Bahudodda



Reliable. Effective. Innovative.



Sep 11, 2024

#### Letter of Intent/Commitment

Reference: The Department of Health and Human Services (HHS), Salesforce Professional Support Services (RFQ#: 75P00124Q00078)

To Whom It May Concern,

This letter confirms my full intent, commitment, and qualifications to work on the Salesforce Professional Support Services, The Department of Health and Human Services (HHS) project upon award to Stealth Solutions, Inc., as Prime Contractor.

I am a current employee of REI Systems, Inc., I will continue as an employee and be available to serve on the aforementioned project, beginning at project start.

This commitment is contingent upon contract award and final customer authorization.

**Position Title: Salesforce Administrator**

**Name: Venkat Bahudodda**

Signature: Venkat Anuraag Bahudodda Date 09/12/2024



Department of Health and Human Services (HHS)  
Salesforce Professional Support Services  
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## Commitment Letter – Sudhanshu Satia

### Letter of Intent/Commitment

Reference: The Department of Health and Human Services (HHS), Salesforce Professional Support Services (RFQ#: 75P00124Q00078)

To Whom It May Concern,

This letter confirms my full intent, commitment, and qualifications to work on the Salesforce Professional Support Services, The Department of Health and Human Services (HHS) project upon award to Stealth Solutions, Inc., as Prime Contractor.

I am a current employee of REI Systems, Inc., I will continue as an employee and be available to serve on the aforementioned project, beginning at project start.

This commitment is contingent upon contract award and final customer authorization.

**Position Title:** Project Manager

**Name:** Sudhanshu Satia

Signature:

Date

09/12/2024



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## Commitment Letter – Preetika Soni



46191 Westlake Drive, Suite #112  
Sterling, VA – 20165  
Ph. (571) 230 -5642  
[www.stealth-us.com](http://www.stealth-us.com)

September 06, 2024

### **Letter of Intent/Commitment**

Reference: The Department of Health and Human Services (HHS), Salesforce Professional Support Services (RFQ#: 75P00124Q00078)

**To Whom It May Concern,**

This letter confirms my full intent, commitment, and qualifications to work on the Salesforce Professional Support Services, The Department of Health and Human Services (HHS) project upon award to Stealth Solutions, Inc., as Prime Contractor.

I am a current employee of Stealth Solutions, Inc., I will continue as an employee and be available to serve on the aforementioned project, beginning at project start.

This commitment is contingent upon contract award and final customer authorization.

**Position Title: Developer**

**Name: Preetika Soni**

Signature:

Date: September 06, 2024



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## Commitment Letter – Siva Giri Narasimha Naidu Pothini



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Sterling, VA – 20165  
Ph. (571) 230 -5642  
[www.stealth-us.com](http://www.stealth-us.com)

September 06, 2024

### **Letter of Intent/Commitment**

Reference: The Department of Health and Human Services (HHS), Salesforce Professional Support Services (RFQ#: 75P00124Q00078)

**To Whom It May Concern,**

This letter confirms my full intent, commitment, and qualifications to work on the Salesforce Professional Support Services, The Department of Health and Human Services (HHS) project upon award to Stealth Solutions, Inc., as Prime Contractor.

I am a current employee of Stealth Solutions, Inc., I will continue as an employee and be available to serve on the aforementioned project, beginning at project start.

This commitment is contingent upon contract award and final customer authorization.

**Position Title: Developer**

**Name: Naidu Pothini**

Signature:

Date: September 06, 2024



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## Appendix B – Draft Quality Assurance Surveillance Plan (QASP)

1. **Introduction:** The Quality Assurance Surveillance Plan (QASP) sets forth the procedures and guidelines that Team Stealth will use to ensure all deliverables and services under the HHS Salesforce Development Support Services contract meet high standards of performance, compliance, and timeliness. This plan aligns with the Performance Work Statement (PWS) and will be continuously refined to reflect the project's real-time needs, risks, and performance metrics.
2. **Purpose:** The purpose of the QASP is to provide a structured approach to monitoring Team Stealth's performance throughout the contract. It establishes the quality control methods, performance metrics, and corrective actions needed to meet the objectives outlined in the PWS. Team Stealth's QASP focuses on customer satisfaction, continuous improvement, and ensuring our services are reliable and compliant with federal regulations.

### 3. Quality Levels by Task:

- **Task 1: Project Management**
  - **Standard:** Deliver all project management tasks on time, including the Project Management Plan (PMP), risk logs, and status reports.
  - **Quality Control:** Monthly status reports and regular tracking of the project schedule will ensure compliance with project timelines. We will ensure that rework does not exceed 10% and that 100% of reworked deliverables comply upon resubmission.
    - **Monitoring:** Bi-weekly meetings will track progress and ensure adherence to the project plan.
- **Task 2: Salesforce Analysis and Consultation Services**
  - **Standard:** Deliver comprehensive and timely analysis reports of Salesforce platform performance and security settings.
  - **Quality Control:** All reports will undergo a thorough internal review before submission, ensuring accuracy and timeliness.
  - **Monitoring:** Monthly evaluations will ensure reports are complete and actionable.
- **Task 3: Salesforce Technical Support Services**
  - **Standard:** Provide timely responses to OCIO IPSO requests and address Salesforce user issues.
  - **Quality Control:** Track and monitor response times through a helpdesk ticketing system, ensuring compliance with SLAs. Responses to OCIO IPSO must be within one business day, and 95% of user issues must be resolved within 48 hours.
  - **Monitoring:** Weekly monitoring of service logs to ensure timely resolutions and immediate corrective action for delays.
- **Task 4: Salesforce Enhancements and O&M Services**
  - **Standard:** Implement Salesforce enhancements and address user-reported issues promptly, ensuring minimal downtime.
  - **Quality Control:** Automated and manual performance testing will ensure enhancements are fully functional and compliant.
  - **Monitoring:** Bi-weekly reviews of O&M performance, with continuous monitoring through a ticketing system for tracking issues.
- **Task 5: Technical Documentation**
  - **Standard:** Ensure all technical documentation meets Section 508 compliance and is uploaded to the HHS repository within one week of completion.



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- **Quality Control:** Internal reviews will ensure documentation is complete, accurate, and compliant with accessibility standards.
- **Monitoring:** Monthly checks of the document repository to verify timely submission and compliance.
- **Task 6: New Salesforce Development (Optional Task)**
  - **Standard:** Develop new Salesforce components aligned with HHS's needs, ensuring scalability and security.
  - **Quality Control:** Automated testing, Agile methodologies, and regular UAT cycles will ensure all new developments meet performance requirements.
  - **Monitoring:** Sprint reviews will allow continuous evaluation of the development process.
- **Task 7: Transition-Out Services**
  - **Standard:** Execute a seamless transition by providing detailed knowledge transfer and training to incoming teams.
  - **Quality Control:** Internal tracking of transition milestones and tasks to ensure timely completion without service disruption.
  - **Monitoring:** Weekly check-ins during the transition phase to ensure alignment with the transition plan.

**4. Quality Assurance Methodology:** Team Stealth's QA methodology is based on best practices derived from our CMMI Level 3 and ISO 9001:2018 certifications. We will use a multi-step iterative approach, incorporating built-in code and quality checks throughout the project lifecycle. Our methodology includes:

- **Measuring Performance:** We will employ 100% evaluation for critical tasks, random reviews for recurring tasks, and incorporate customer and stakeholder feedback to refine quality standards. Active Quality Improvement **techniques**, such as Agile Quality Management, will be used to ensure our teams are self-governing and improving their processes over time.
- **Tracking & Auditing:** Team Stealth will monitor actual performance against the Acceptable Quality Levels (AQL) and Service Level Agreements (SLA) defined in the PWS. Performance will be evaluated regularly using internal audits, project metrics, and performance dashboards.
- **Risk Management:** Risks will be continuously identified, assessed, and mitigated using a Risk Register maintained in SharePoint. Any issues will be escalated to HHS leadership when necessary.

## 5. Monitoring & Reporting:

We will employ a variety of monitoring methods, including regular reviews, real-time tracking through Microsoft Teams and SharePoint, and feedback loops with HHS stakeholders to ensure ongoing quality assurance.

- **Self-Surveillance:** Performance standards will be audited regularly by Team Stealth's internal Quality Control team to **ensure** compliance with AQLs and SLAs.
- **Regular Reporting:** The Project Manager will deliver monthly development reports detailing the status of tasks, schedules, risks, and deliverables. These reports will include resource hours and cost data to support accurate cost tracking.
- **Corrective Action:** In the event of deviations from the expected quality levels, corrective action plans will be developed to address the issue promptly.

**6. Risk Mitigation for Quality Assurance:** To mitigate risks, Team Stealth will implement continuous testing, quality control checks, and regular audits. If risks or performance issues are identified, we will



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initiate corrective actions immediately. Risks will be escalated to HHS leadership as needed and tracked through a Risk Register.

**7. Continuous Improvement:** Team Stealth is committed to continuously improving our quality assurance processes. We will track performance metrics and customer feedback, incorporating insights into our quality control procedures to ensure optimal project outcomes. Regular reviews, combined with feedback from stakeholders, will drive continuous refinement of our processes to align with HHS's evolving needs.

### **Conclusion**

This Quality Assurance Surveillance Plan (QASP) is designed to ensure the successful execution of the HHS Salesforce Development Support Services project by focusing on performance, compliance, and continuous improvement. Team Stealth's comprehensive quality control framework will provide HHS with timely, high-quality deliverables while ensuring adherence to project timelines and budget constraints.



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## Appendix C – An Accessibility Conformance Report (ACR) Examples

Below are examples of ACRs from our previous projects, along with the VPAT for Salesforce, which we typically reference when configuring or customizing Salesforce for clients, especially for Lightning UIs or customer interfaces. We compare our work against the Salesforce VPAT to determine if an issue stems from Salesforce itself—in which case we collaborate with Salesforce to resolve it—or if the issue was introduced during the implementation. In the latter case, we will work with the project team to address it. Below, you will find links to the Salesforce product VPATs. On the following pages, Team Stealth includes examples of ACRs from our implementations.

### Link to Salesforce Products VPATS:

[https://www.salesforce.com/company/legal/508\\_accessibility/](https://www.salesforce.com/company/legal/508_accessibility/)

**Example 1 of ACR from a Client Implementation**

	<p>System Name: <input type="text"/></p> <p>Date PAT Completed: <input type="text"/> Date PAT Completed</p> <p>System Developed: <input checked="" type="radio"/> Before 1/18/2018 <input type="radio"/> On/after 1/18/2018</p>																																												
<p><b>Principle 1: Perceivable – information and user interface components must be presentable to users in ways they can perceive.</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Standard</th> <th style="width: 60%;">Description</th> <th style="width: 10%;">Applies Yes/No</th> <th style="width: 10%;">Meets Yes/No</th> <th style="width: 20%;">Comments (mandatory)</th> </tr> </thead> <tbody> <tr> <td colspan="5"><i>Guideline 1.1 Text Alternatives: Provide text alternatives for any non-text content so that it can be changed into other forms people need, such as large print, braille, speech, symbols or simpler language.</i></td> </tr> <tr> <td rowspan="7">1.1.1</td> <td rowspan="7"> <p>Non-text Content: All non-text content that is presented to the user has a text alternative that serves the equivalent purpose, except for the situations listed below (Level A).</p> <ul style="list-style-type: none"> <li>• Controls, Input: If non-text content is a control or accepts user input, then it has a name that describes its purpose. 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(Refer to Guideline 1.2 for the additional requirements for media.)</li> <li>• Test: If non-text content is a test or exercise that would be invalid if presented in text, then text alternatives at least provide descriptive identification of the non-text content.</li> <li>• Sensory: If non-text content is primarily intended to create a specific sensory experience, then text alternatives at least provide descriptive identification of the non-text content.</li> <li>• CAPTCHA: If the purpose of non-text content is to confirm that content is being accessed by a person rather than a computer, then text alternatives that identify and describe the purpose of the non-text content are provided, and alternative forms of CAPTCHA using output modes for different types of sensory perception are provided to accommodate different disabilities.</li> <li>• Decorative, Formatting, Invisible: If non-text content is pure decoration, is used only for visual formatting, or is not presented to users, then it is implemented in a way that it can be ignored by assistive technology.</li> </ul> </td> <td style="background-color: #d9e1f2;">Yes</td> <td style="background-color: #d9e1f2;">Yes</td> <td rowspan="7"> <p>The images provided within the Prosper Africa application include clear alternative text descriptions. 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1.2.2	Captions (Prerecorded): Captions are provided for all prerecorded audio content in synchronized media, except when the media is a media alternative for text and is clearly labeled as such. (Level A)	No	N/A	The Prosper Africa application features do not																																									

Standard	Description	Applies Yes/No	Meets Yes/No	Comments (mandatory)
1.2.3	Audio Description or Media Alternative (Prerecorded): An alternative for time-based media or audio description of the prerecorded video content is provided for synchronized media, except when the media is a media alternative for text and is clearly labeled as such. (Level A)	No	N/A	The Prosper Africa Tracker application does not include
1.2.4	Captions (Live): Captions are provided for all live audio content in synchronized media. (Level AA)	No	N/A	The Prosper Africa Tracker
1.2.5	Audio Description (Prerecorded): Audio description is provided for all prerecorded video content in synchronized media. (Level AA)	No	N/A	The Prosper Africa Tracker
<i>Guideline 1.3 Adaptable: Create content that can be presented in different ways (for example simpler layout) without losing information or structure.</i>				
1.3.1	Info and Relationships: Information, structure, and relationships conveyed through presentation can be programmatically determined or are available in text. (Level A)	Yes	Yes	Descriptive text is used to indicate the various types
1.3.2	Meaningful Sequence: When the sequence in which content is presented affects its meaning, a correct reading sequence can be programmatically determined. (Level A)	Yes	Yes	The Prosper Africa Tracker is built using a
1.3.3	Sensory Characteristics: Instructions provided for understanding and operating content do not rely solely on sensory characteristics of components such as shape, size, visual location, orientation, or sound. (Level A)	Yes	Yes	All instructions for operating with the Prosper Africa Tracker user
<i>Guideline 1.4 Distinguishable: Make it easier for users to see and hear content including separating foreground from background.</i>				
1.4.1	Use of Color: Color is not used as the only visual means of conveying information, indicating an action, prompting a response, or distinguishing a visual element. (Level A)	Yes	Yes	The Prosper Africa Tracker leverages the use
1.4.2	Audio Control: If any audio on a Web page plays automatically for more than 3 seconds, either a mechanism is available to pause or stop the audio, or a mechanism is available to control audio volume independently from the overall system volume level. (Level A)	No	N/A	The Prosper Africa Tracker pages do not include audio or
1.4.3	Contrast (Minimum): The visual presentation of text and images of text has a contrast ratio of at least 4.5:1, except for the following: (Level AA) <ul style="list-style-type: none"> <li>• Large Text: Large-scale text and images of large-scale text have a contrast ratio of at least 3:1;</li> <li>• Incidental: Text or images of text that are part of an inactive user interface component, that are pure decoration, that are not visible to anyone, or that are part of a picture that contains significant other visual content, have no contrast requirement.</li> </ul>	Select one Select one  Select one Select one	Select one Select one	The visual presentation of text and images of text has a contrast ratio of 8.5:1.
1.4.4	Logotypes: Text that is part of a logo or brand name has no minimum contrast requirement.	Select one Select one	Select one Select one	The Prosper Africa Tracker allows end-users



Standard	Description	Applies Yes/No	Meets Yes/No	Comments (mandatory)
1.4.5	Images of Text: If the technologies being used can achieve the visual presentation, text is used to convey information rather than images of text except for the following: (Level AA) <ul style="list-style-type: none"> <li>Customizable: The image of text can be visually customized to the user's requirements;</li> <li>Essential: A particular presentation of text is essential to the information being conveyed.</li> </ul>	No No	N/A N/A	The Prosper Africa Tracker does not include Images of Text.

**Principle 2: Operable - User interface components and navigation must be operable.**

Standard	Description	Applies Yes/No	Meets Yes/No	Comments (mandatory)
<i>Guideline 2.1 Keyboard Accessible: Make all functionality available from a keyboard.</i>				
2.1.1	Keyboard: All functionality of the content is operable through a keyboard interface without requiring specific timings for individual keystrokes, except where the underlying function requires input that depends on the path of the user's movement and not just the endpoints. (Level A)	Yes	Yes	The Prosper Africa Tracker supports standard keyboard
<i>Guideline 2.2 Enough Time: Provide users enough time to read and use content.</i>				
2.2.1	Timing Adjustable: For each time limit that is set by the content, at least one of the following is true: (Level A) <ul style="list-style-type: none"> <li>Turn off: The user is allowed to turn off the time limit before encountering it; or</li> <li>Adjust: The user is allowed to adjust the time limit before encountering it over a wide range that is at least ten times the length of the default setting; or</li> <li>Extend: The user is warned before time expires and given at least 20 seconds to extend the time limit with a simple action (for example, "press the space bar"), and the user is allowed to extend the time limit at least ten times; or</li> <li>Real-time Exception: The time limit is a required part of a real-time event (for example, an auction), and no alternative to the time limit is possible; or</li> <li>Essential Exception: The time limit is essential and extending it would invalidate the activity; or</li> <li>20 Hour Exception: The time limit is longer than 20 hours.</li> </ul>	No No Yes No No No	N/A N/A Yes N/A N/A N/A	The Prosper Africa Tracker provides session time alerts and also provides the option to select an additional time for continuing the login session. Other than this capability, there are no other features or functionalities that require any time limits.



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Standard	Description	Applies Yes/No	Meets Yes/No	Comments (mandatory)
2.2.2	<p>Pause, Stop, Hide: For moving, blinking, scrolling, or auto-updating information, all of the following are true: (Level A)</p> <ul style="list-style-type: none"><li>Moving, blinking, scrolling: For any moving, blinking or scrolling information that (1) starts automatically, (2) lasts more than five seconds, and (3) is presented in parallel with other content, there is a mechanism for the user to pause, stop, or hide it unless the movement, blinking, or scrolling is part of an activity where it is essential; and</li><li>Auto-updating: For any auto-updating information that (1) starts automatically and (2) is presented in parallel with other content, there is a mechanism for the user to pause, stop, or hide it or to control the frequency of the update unless the auto-updating is part of an activity where it is essential.</li></ul>	No No	N/A N/A	The Prosper Africa Tracker does not have any moving, blinking, scrolling, or auto-updating information.
<i>Guideline 2.3 Seizures: Do not design content in a way that is known to cause seizures.</i>				
2.3.1	Three Flashes or Below Threshold: Web pages do not contain anything that flashes more than three times in any one second period, or the flash is below the general flash and red flash thresholds. (Level A)	Yes	Yes	The Prosper Africa Tracker does not contain
<i>Guideline 2.4 Navigable: Provide ways to help users navigate, find content, and determine where they are.</i>				
2.4.1	Bypass Blocks: A mechanism is available to bypass blocks of content that are repeated on multiple Web pages. (Level A)	No	No	The application does not allow
2.4.2	Page Titled: Web pages have titles that describe topic or purpose. (Level A)	Yes	Yes	All Prosper Africa Tracker pages
2.4.3	Focus Order: If a Web page can be navigated sequentially and the navigation sequences affect meaning or operation, focusable components receive focus in an order that preserves meaning and operability. (Level A)	Yes	Yes	The user controls receive keyboard focus in the same tab order in which
2.4.4	Link Purpose (In Context): The purpose of each link can be determined from the link text alone or from the link text together with its programmatically determined link context, except where the purpose of the link would be ambiguous to users in general. (Level A)	Yes	Yes	Link elements within Prosper Africa Tracker provide a purpose
2.4.5	Multiple Ways: More than one way is available to locate a Web page within a set of Web pages except where the Web Page is the result of, or a step in, a process. (Level AA)	No	N/A	The top navigation panel to access the
2.4.6	Headings and Labels: Headings and labels describe topic or purpose. (Level AA)	Yes	Yes	All Headings and labels describe
2.4.7	Focus Visible: Any keyboard operable user interface has a mode of operation where the keyboard focus indicator is visible. (Level AA)	Yes	Yes	The keyboard focus indicator is

**Principle 3: Understandable - Information and the operation of user interface must be understandable.**

Standard	Description	Applies Yes/No	Meets Yes/No	Comments (mandatory)
<i>Guideline 3.1 Readable: Make text content readable and understandable.</i>				
3.1.1	Language of Page: The default human language of each Web page can be programmatically determined. (Level A)	Yes	Yes	Yes, the language of the page can
3.1.2	Language of Parts: The human language of each passage or phrase in the content can be programmatically determined except for proper names, technical terms, words of indeterminate language, and words or phrases that have become part of the vernacular of the immediately surrounding text. (Level AA)	Yes	Yes	Yes, The human language of each passage or phrase in the content can be
<i>Guideline 3.2 Predictable: Make Web pages appear and operate in predictable ways.</i>				
3.2.1	On Focus: When any component receives focus, it does not initiate a change of context. (Level A)	Yes	Yes	When a component
3.2.2	On Input: Changing the setting of any user interface component does not automatically cause a change of context unless the user has been advised of the behavior before using the component. (Level A)	Yes	Yes	Changing the setting of core components and
3.2.3	Consistent Navigation: Navigational mechanisms that are repeated on multiple Web pages within a set of Web pages occur in the same relative order each time they are repeated, unless a change is initiated by the user. (Level AA)	Yes	Yes	The Prosper Africa Tracker navigation is consistent on all
3.2.4	Consistent Identification: Components that have the same functionality within a set of Web pages are identified consistently. (Level AA)	Yes	Yes	All components with the same
<i>Guideline 3.3 Input Assistance: Help users avoid and correct mistakes.</i>				
3.3.1	Error Identification: If an input error is automatically detected, the item that is in error is identified and the error is described to the user in text. (Level A)	Yes	Yes	Users are visually informed when an input error is
3.3.2	Labels or Instructions: Labels or instructions are provided when content requires user input. (Level A)	Yes	Yes	The electronic form controls,
3.3.3	Error Suggestion: If an input error is automatically detected and suggestions for correction are known, then the suggestions are provided to the user, unless it would jeopardize the security or purpose of the content. (Level AA)	No	No	No, the system does not provide automatic error suggestions.
3.3.4	Error Prevention (Legal, Financial, Data): For Web pages that cause legal commitments or financial transactions for the user to occur, that modify or delete user-controllable data in data storage systems, or that submit user test responses, at least one of the following is true: (Level AA)	No	N/A	The Prosper Africa Tracker does not cause legal commitments or financial transactions for the user.

**reliably by a wide variety of user agents, including assistive technologies.**

Standard	Description	Applies Yes/No	Meets Yes/No	Comments (mandatory)
<i>Guideline 4.1 Compatible: Maximize compatibility with current and future user agents, including assistive technologies.</i>				
4.1.1	Parsing: In content implemented using markup languages, elements have complete start and end tags, elements are nested according to their specifications, elements do not contain duplicate attributes, and any IDs are unique, except where the specifications allow these features. (Level A)	Yes	Yes	The Prosper Africa Tracker is built on the Salesforce platform. The
4.1.2	Name, Role, Value: For all user interface components (including but not limited to: form elements, links and components generated by scripts), the name and role can be programmatically determined; states, properties, and values that can be set by the user can be programmatically set; and notification of changes to these items is available to user agents, including assistive technologies. (Level A)	Yes	Yes	The name, role, and value used in the Prosper Africa Tracker user interface elements are



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## Example 2 of ACR from a Client Implementation

PROJECT NAME

ACR Version 2.1 – June 2023

**Name of Product/Version:**

**Product Description:**

**Date:**

**Contact information:**

**Notes:** The information contained in this report applies to the product itself.

**Evaluation Methods Used:**

Testing involved extensive use of leading assistive technologies such as JAWS Screen Reader, NVDA, WAVE Toolbar, WAT toolbar, Color Contrast Analyzer, Web Developer Toolbar, SortSite, Deque AxE, aChecker and Firebug, built in Accessibility Checkers within MSWord 2010 (or above), MS Power-point 2010 (or above), as well exclusive use of the keyboard. These were supplemented with techniques such as manual inspection of application and internal reviews to ensure 508 compliance

**Applicable Standards/Guidelines**

This report covers the degree of conformance for the following accessibility standard/guidelines:

Standard/Guideline	Included In Report
Web Content Accessibility Guidelines 2.0, at <a href="http://www.w3.org/TR/2008/REC-WCAG20-20081211/">http://www.w3.org/TR/2008/REC-WCAG20-20081211/</a>	Level A - Yes Level AA - Yes Level AAA - No
Revised Section 508 standards as published by the U.S. Access Board in the Federal Register on January 18, 2017  Corrections to the ICT Final Rule as published by the US Access Board in the Federal Register on January 22, 2018	Yes
EN 301 549 Accessibility requirements suitable for public procurement of ICT products and services in Europe, - V1.1.2 (2015-04) at <a href="http://mandate376.standards.eu/standard">http://mandate376.standards.eu/standard</a>	No

### Terms

The terms used in the Conformance Level information are defined as follows:

**Supports:** The functionality of the product has at least one method that meets the criterion without known defects or meets with equivalent facilitation.

Supports with Exceptions: Some functionality of the product does not meet the criterion.

Does Not Support: The majority of product functionality does not meet the criterion.

Not Applicable: The criterion is not relevant to the product.

Not Evaluated: The product has not been evaluated against the criterion. This can be used only in WCAG 2.0 Level AAA.

### WCAG 2.0 Report

Tables 1 and 2 also document conformance with:

Revised Section 508: Chapter 5 – 501.1 Scope, 504.2 Content Creation or Editing, and Chapter 6 – 602.3 Electronic Support Documentation.

Note: When reporting on conformance with the WCAG 2.0 Success Criteria, they are scoped for full pages, complete processes, and accessibility-supported ways of using technology as documented in the WCAG 2.0 Conformance Requirements.

**Table 1: Success Criteria, Level A**

Notes:

Criteria	Conformance Level	Remarks and Explanations
1.1.1 Non-text Content (Level A) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>These modules use standard HTML and WAI-ARIA techniques for providing text equivalents of non-text elements. This includes the use of “ALT” attributes for images and the use of “aria-label” or “aria-describedby” attributes for other visual elements.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Use Firefox plugin Wave toolbar and click on “Errors, Features and Alerts” button to identify any “alt” missing from the page and perform manual testing using Firefox firebug plugin to identify the meaningful messages for “alt” tags are provided for the images.</li> <li>• Turn off images using Firefox browser, Web Developer toolbar. This will display the alternative text instead of graphics. Verify if images contain alt tags with meaningful message. If it is a decorative element, alt should be equal to empty.</li> <li>• Manually, search the HTML source for “IMG” tags for a webpage. For each IMG, note if there is an “alt” or</li> </ul>



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		<p>“longdesc” attribute. The “alt” attribute should always be present (although for spacer and other non-content images, the value of “alt” should be ALT=“”). The “longdesc” attribute is optional and should be used when the text needed to describe the function of the graphic is too long for an alt text.</p>
<p>1.2.1 Audio-only and Video-only (Prerecorded) (Level A) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>Any audio-only and video-only media content that is prerecorded will be supported as needed.</p> <p>Tools: NVDA or JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Examine the video and determine if controls for alternate text or audio description are present.</li><li>• Ensure using keyboard that video controls for alternate text or audio description are present and are accessible using different keystrokes.</li><li>• View the video or presentation visually that has alternate text and captioning. Determine if the product has open or closed captioning. If it has open captioning, the product satisfies this standard because this type of captioning is always permanent. If the production has closed captioning, determine if the caption display is user selectable. Turn on the closed captions and view a part of the presentation that you know is captioned.</li></ul>
<p>1.2.2 Captions (Prerecorded) (Level A) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>Any prerecorded video that requires captions will be supported as needed.</p> <p>Tools: NVDA or JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Examine the video and determine if controls for alternate text or audio description are present.</li></ul>



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		<ul style="list-style-type: none"><li>• Ensure using keyboard that video controls for alternate text or audio description are present and are accessible using different keystrokes.</li><li>• View the video or presentation visually that has alternate text and captioning. Determine if the product has open or closed captioning. If it has open captioning, the product satisfies this standard because this type of captioning is always permanent. If the production has closed captioning, determine if the caption display is user selectable. Turn on the closed captions and view a part of the presentation that you know is captioned.</li></ul>
<p>1.2.3 Audio Description or Media Alternative (Prerecorded) (Level A) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>Any prerecorded/synchronized media that requires audio description will be supported as needed.</p> <p>Tools: NVDA or JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Examine the video and determine if controls for alternate text or audio description are present.</li><li>• Ensure using keyboard that video controls for alternate text or audio description are present and are accessible using different keystrokes.</li><li>• View the video or presentation visually that has alternate text and captioning. Determine if the product has open or closed captioning. If it has open captioning, the product satisfies this standard because this type of captioning is always permanent. If the production has closed captioning, determine if the caption display is user selectable. Turn on the closed captions and view a part of the presentation that you know is captioned.</li></ul>
<p>1.3.1 Info and Relationships (Level A) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool)</p>	Supports	<p>These modules use semantically correct markup so that information, structure and relationships can be understood independent of presentation.</p> <p>Tools: WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p>

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602.3 (Support Docs)		<p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Using Assistive technology (Jaw's screen reader) and keyboard, click on all the different regions of an image map and make sure JAWS can read the links properly. (Remember that a region can be as small as a single pixel.) Each region should have a corresponding text link on the page.</li> <li>• Test data tables manually using Firefox browser Firebug tool or Juicy color contrast table inspector plugin to identify the &lt;th&gt; and scope attribute elements are present to identify each row header and each column header. This can also be achieved by Firefox browser WAVE toolbar.</li> <li>• Use an Assistive Technology such as screen reader (JAWS) to make sure that the row and column headers of the data table are identified correctly when read by a screen reader. For example, when using JAWS, use the CTRL + ALT + Arrow keys to navigate the table and CTRL + ALT + NumPad 5 to speak the information in the cell which has focus. Also test if the summary attribute is available and reads properly for complex tables.</li> <li>• The tables do not contain tabular data and are only used for the visual layout; thus, this standard does not apply. Human judgment should be used to determine whether a table is used only for layout purposes, and this standard will not apply to such tables.</li> <li>• Using firebug tool: <ul style="list-style-type: none"> <li>o Examine the source code using Firebug tool and note the existence of server-side image maps by looking for an “ismap” attribute in an &lt;img&gt; tag or “input type = image” within a form. For each map determine if there are redundant text links for each active region. Determine if each redundant text link is appropriate for the region</li> </ul> </li> </ul>
1.3.2 Meaningful Sequence (Level A) Also applies to: 2017 Section 508 501 (Web)(Software)	Supports	<p>These modules use semantically correct markup so that information and meaning of content and controls can be interpreted by the assistive technology tools.</p> <p>Tools:</p>

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504.2 (Authoring Tool) 602.3 (Support Docs)		<p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>Using Assistive Technology such as screen reader (JAWS) and keyboard tabbing, the focus on the objects should move in a logical sequence to all fields and information (e.g., starting with a description of the first name field, then to first name, description of the last name field, last name, etc.). In addition, we should be able to complete the form and submit it using only the keyboard.</li> <li>Use Keyboard and Assistive Technology such as screen reader (JAWS) to test on-screen indication of the current focus is provided, that moves among interactive interface elements such as menus, dialogs, forms, property boxes as the input focus changes.</li> <li>Check the cursor to make sure it is visible on the screen and focus should be easy to find using the TAB or ARROW keys to move between different page elements.</li> <li>Test using keyboard to fill in the form data in the proper fields in the required format (e.g., name, state, telephone numbers, and critical fields).</li> <li>Using a keyboard, ensure that all the form elements and functionality can be assessed and submitted.</li> <li>Verify using keyboard, if the tab order is from left to right side, unless it's required in different way.</li> <li>Verify using keyboard, tab key that the focus will be placed on the forward key after the last input field in the screen.</li> <li>Make sure using Firefox plugin Wave toolbar “Errors, Features and Alerts” button that form labels are properly associated with input controls, objects, icons and images, if required.</li> </ul>
1.3.3 Sensory Characteristics (Level A)  Also applies to: 2017 Section 508 501 (Web)(Software)	Supports	<p>These modules provide additional description and textual content to identify controls and content on the web page and does not depend on the sensory characteristics alone such as shape, size, visual location, orientation or sound.</p>



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504.2 (Authoring Tool) 602.3 (Support Docs)		<p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Use Firefox plugin Wave toolbar and click on “Errors, Features and Alerts” button to identify any “alt” missing from the page and perform manual testing using Firefox firebug plugin to identify the meaningful messages for “alt” tags are provided for the images.</li><li>• Turn off images using Firefox browser, Web Developer toolbar. This will display the alternative text instead of graphics. Verify if images contain alt tags with meaningful message. If it is a decorative element, alt should be equal to empty.</li><li>• Manually, search the HTML source for “IMG” tags for a webpage. For each IMG, note if there is an “alt” or “longdesc” attribute. The “alt” attribute should always be present (although for spacer and other non-content images, the value of “alt” should be ALT=“”). The “longdesc” attribute is optional and should be used when the text needed to describe the function of the graphic is too long for an alt text.</li><li>• Manually, search the HTML source for “IMG” tags for a webpage.</li></ul>
1.4.1 Use of Color (Level A)  Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>These modules are designed so that all the information conveyed with color is also available without color using alternative text or tooltips. Color coding is not used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Check visually to make sure required star field indicator is present for all required fields and it reads properly</li></ul>



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		<p>using Assistive Technology such as screen reader (JAWS).</p> <ul style="list-style-type: none"><li>• Print the application page without color on a black and white printer and verify that all information is still conveyed.</li><li>• Make sure visually, each module of the application and identify each special function or item, including error messages, that are encoded using color.</li><li>• Test color indicative-check visually, if any image or color is used to represent an object, they should be tagged with the name or tooltip.</li><li>• Confirm visually that all hyperlinked text is indicated by a standard blue color defined for the application.</li><li>• Verify that any information conveyed with color is also conveyed through text or through another means that are accessible to Assistive Technology such as screen reader (JAWS).</li><li>• Print the page on a black and white printer or view on a monochrome monitor. Navigation and other information should still be obvious.</li><li>• Run Firefox browser, Juicy color contrast analyzer plugin to text contrast ratio of the page to be at least 4.5:1 exist between text, and images of text, and background behind the text.</li><li>• Test visually using mouse inputs, to make sure that all links are distinguished in the web page from surrounding text with sufficient color contrast and has additional differentiation provided when the link receives focus, e.g., it becomes underlined.</li></ul>
1.4.2 Audio Control (Level A)  Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>Any audio control that requires audio control will be supported as needed.</p> <p>Tools:</p> <p>NVDA or JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Verify that all the sound that play automatically on the web page stops in 3 seconds.</li></ul>



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2.1.1 Keyboard (Level A)  Also applies to:  2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<ul style="list-style-type: none"><li>If applicable, verify that user can disable/enable the sounds manually by using a control at the beginning of the web page. After disabling sounds, reload the web page to verify if the sounds still play.</li></ul> <p>These modules support standard keyboard navigation and input functions to move between the different controls available on the web page using the arrow keys and pressing [Space] or [Enter] to make selections.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>Using Assistive Technology such as screen reader (JAWS) and keyboard tabbing, the focus on the objects should move in a logical sequence to all fields and information (e.g., starting with a description of the first name field, then to first name, description of the last name field, last name, etc.). In addition, we should be able to complete the form and submit it using only the keyboard.</li><li>Use Keyboard and Assistive Technology such as screen reader (JAWS) to test on-screen indication of the current focus is provided, that moves among interactive interface elements such as menus, dialogs, forms, property boxes as the input focus changes.</li><li>Check the cursor to make sure it is visible on the screen and focus should be easy to find using the TAB or ARROW keys to move between different page elements.</li><li>Test using keyboard to fill in the form data in the proper fields in the required format (e.g., name, state, telephone numbers, and critical fields).</li><li>Using a keyboard, ensure that all the form elements and functionality can be assessed and submitted.</li><li>Verify using keyboard, if the tab order is from left to right side, unless it's required in different way.</li></ul>



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<p>2.1.2 No Keyboard Trap (Level A) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<ul style="list-style-type: none"><li>Verify using keyboard, tab key that the focus will be placed on the forward key after the last input field in the screen.</li><li>Make sure using Firefox plugin Wave toolbar “Errors, Features and Alerts” button that form labels are properly associated with input controls, objects, icons and images, if required.</li></ul> <p>These modules support standard keyboard navigation and input functions to move between the different controls available on the web page and ensures that users are not trapped in a subset of contents or list items in a particular control.</p> <p>Tools:</p> <p>WAVE, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>Using Assistive Technology such as screen reader (JAWS) and keyboard tabbing, the focus on the objects should move in a logical sequence to all fields and information (e.g., starting with a description of the first name field, then to first name, description of the last name field, last name, etc.). In addition, we should be able to complete the form and submit it using only the keyboard.</li><li>Use Keyboard and Assistive Technology such as screen reader (JAWS) to test on-screen indication of the current focus is provided, that moves among interactive interface elements such as menus, dialogs, forms, property boxes as the input focus changes.</li><li>Use Keyboard and Assistive Technology such as screen reader (JAWS) to navigate through the options in a particular control and after the last list item in the control, the focus should either go to the next logical element or focus should go to the top of the web page.</li><li>Verify help information is available to provide details on how to exit from the content or a control and can be accessed via keyboard</li></ul>

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<p>2.2.1 Timing Adjustable (Level A)</p> <p>Also applies to:</p> <p>2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>These modules alert the user whenever a timed response is required and given sufficient time to indicate more time is required using keyboard or mouse inputs.</p> <p>Tools: WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Login to the web application and wait until you receive a warning message that the instructions are going to time out. When this happens, determine if the time-response alert page gives you the ability to indicate that more time is required. Use human judgment to determine if the alert is meaningful and clearly indicates how to request more time. Finally, using assistive technology such screen reader (JAWS), determine if the alert is accessible to a screen reader or via keyboard</li> <li>• For additional time, determine if the page provides an adequate timed response alert message to select different options. If yes, determine if the page provides additional time as requested and does not log out users from the application.</li> </ul>
<p>2.2.2 Pause, Stop, Hide (Level A)</p> <p>Also applies to:</p> <p>2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>These modules do not include moving, blinking, scrolling, or auto updating information.</p> <p>Tools: NVDA or JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Inspect if there is any animation available in the application. If yes, using keyboard check whether there is an option to turn on redundant information for animated presentations using enter or spacebar keys.</li> <li>• If animation is available, determine if there is a method to disable animation. If so, turn off animation and then verify that animation is not displayed, and that the</li> </ul>

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<p>2.3.1 Three Flashes or Below Threshold (Level A)</p> <p>Also applies to:</p> <p>2017 Section 508</p> <p>501 (Web)(Software)</p> <p>504.2 (Authoring Tool)</p> <p>602.3 (Support Docs)</p>	Supports	<p>information is displayed in a non-animated mode. This could also be performed using keyboard or mouse inputs</p> <p>These modules do not include moving, blinking, scrolling, flashing, or auto updating information.</p> <p>Tools: NVDA or JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Visually review application pages to locate flashing or blinking elements. If any items are flashing in the 2 to 55 Hz range, they shall either have the frequency reduced or increased to flash outside of this range or be replaced with a non-blinking presentation.</li> <li>• Visually ensure there is no noticeable flickering, flashing or blinking elements in the application screens.</li> <li>• Flickering elements can also be identified by examining the source code or using Firefox browser Firebug plugin. Since flashing and flickering elements are typically added using techniques such as animated gifs, Java applets, or third-party plug-ins or applications, they can be identified by looking for the presence of tags that are used to identify these elements.</li> </ul>
<p>2.4.1 Bypass Blocks (Level A)</p> <p>Also applies to:</p> <p>2017 Section 508</p> <p>501 (Web)(Software) – Does not apply to non-web software</p> <p>504.2 (Authoring Tool)</p> <p>602.3 (Support Docs) – Does not apply to non-web docs</p>	Supports	<p>These modules permit users to skip block of content that are repeated and get back to the main content of each web page.</p> <p>Tools: WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Using keyboard navigate from the top of the browser navigation bar and then press “Tab” to go on to the page. Then “Skip Navigation” link should display, and user can access that link to skip navigation using enter key set focus to the main content area of the page.</li> </ul>



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		<ul style="list-style-type: none"><li>The user should be able to navigate to that main content area without going through all the navigational levels again.</li><li>Ensure that the user can return to previously viewed information without repeating the entire tab order using Shift + tab.</li></ul>
<p>2.4.2 Page Titled (Level A) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>These modules have descriptive titles that facilitates content identification, navigation, topic or purpose of each web page.</p> <p>Tools: WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>Use Firefox browser Wave toolbar and Firebug plugin to identify TITLE attribute is included and intuitive in nature.</li></ul>
<p>2.4.3 Focus Order (Level A) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>These modules use logical tab order through links, form controls and objects. PIMS modules uses semantically correct markup to match with the visual representation of the content on the web page.</p> <p>Tools: WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>Using Assistive Technology such as screen reader (JAWS) and keyboard tabbing, the focus on the objects should move in a logical sequence to all fields and information (e.g., starting with a description of the first name field, then to first name, description of the last name field, last name, etc.). In addition, we should be able to complete the form and submit it using only the keyboard.</li></ul>

Criteria	Conformance Level	Remarks and Explanations
		<ul style="list-style-type: none"> <li>• Use Keyboard and Assistive Technology such as screen reader (JAWS) to test on-screen indication of the current focus is provided, that moves among interactive interface elements such as menus, dialogs, forms, property boxes as the input focus changes.</li> <li>• Check the cursor to make sure it is visible on the screen and focus should be easy to find using the TAB or ARROW keys to move between different page elements.</li> <li>• Test using keyboard to fill in the form data in the proper fields in the required format (e.g., name, state, telephone numbers, and critical fields).</li> <li>• Using a keyboard, ensure that all the form elements and functionality can be assessed and submitted.</li> <li>• Verify using keyboard, if the tab order is from left to right side, unless it's required in different way.</li> <li>• Verify using keyboard, tab key that the focus will be placed on the forward key after the last input field in the screen.</li> <li>• Make sure using Firefox plugin Wave toolbar “Errors, Features and Alerts” button that form labels are properly associated with input controls, objects, icons and images, if required.</li> </ul>
<p>2.4.4 Link Purpose (In Context) (Level A)</p> <p>Also applies to:</p> <p>2017 Section 508</p> <p>501 (Web)(Software)</p> <p>504.2 (Authoring Tool)</p> <p>602.3 (Support Docs)</p>	Supports	<p>These modules use descriptive text or WAI-ARIA techniques such as “aria-label” attribute to table paging control icons, to identify the purpose of links.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Use Firefox plugin Wave toolbar and click on “Errors, Features and Alerts” button to identify any “alt” missing from the page and perform manual testing using Firefox firebug plugin to identify the meaningful messages for “alt” tags are provided for the images.</li> <li>• Turn off images using Firefox browser, Web Developer toolbar. This will display the alternative text instead of</li> </ul>



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		<p>graphics. Verify if images contain alt tags with meaningful message. If it is a decorative element, alt should be equal to empty.</p> <ul style="list-style-type: none"><li>Manually, search the HTML source for “IMG” tags for a webpage. For each IMG, note if there is an “alt” or “longdesc” attribute. The “alt” attribute should always be present (although for spacer and other non-content images, the value of “alt” should be ALT=“”). The “longdesc” attribute is optional and should be used when the text needed to describe the function of the graphic is too long for an alt text.</li><li>Verify the link text manually to ensure the purpose of the link is clear and meaningful.</li></ul>
<p>3.1.1 Language of Page (Level A)</p> <p>Also applies to:</p> <p>2017 Section 508</p> <p>501 (Web)(Software)</p> <p>504.2 (Authoring Tool)</p> <p>602.3 (Support Docs)</p>	Supports	<p>These modules use the language attribute on the HTML element to specify the default language of the web page.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>Use Firefox plugin Wave toolbar and click on “Errors, Features and Alerts” button to identify any “lang” and/or “xml: lang” attribute missing from the page and perform manual testing using Firefox firebug plugin to identify the meaningful value for “lang” and/or “xml: lang” attribute is provided</li><li>Manually, search the HTML source for “lang” and/or “xml: lang” attribute to ensure that the value reflects the primary language used by the web page.</li></ul>
<p>3.2.1 On Focus (Level A)</p> <p>Also applies to:</p> <p>2017 Section 508</p> <p>501 (Web)(Software)</p> <p>504.2 (Authoring Tool)</p> <p>602.3 (Support Docs)</p>	Supports	<p>Within these modules, when a component receives focus, it does not initiate a change of context.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p>



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		<p>Test Procedure:</p> <ul style="list-style-type: none"><li>Using Assistive Technology such as screen reader (JAWS) and keyboard tabbing, the focus on the objects should move in a logical sequence to all fields and information (e.g., starting with a description of the first name field, then to first name, description of the last name field, last name, etc.).</li><li>Manually verify that no changes of context occur when any component receives focus</li></ul>
<p>3.2.2 On Input (Level A) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>Within these modules, when a component receives input, it does not automatically initiate a change of context.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>Using Assistive Technology such as screen reader (JAWS) and keyboard tabbing, the focus on the objects should move in a logical sequence to all fields and information (e.g., starting with a description of the first name field, then to first name, description of the last name field, last name, etc.). In addition, we should be able to complete the form and submit it using only the keyboard.</li><li>Manually verify that no changes of context occur when any component receives input</li><li>Verify that for any logical action on the webpage, there is a web element like “Submit” button available to perform the action and the context of the page should not change just by inputting data to a component.</li></ul>
<p>3.3.1 Error Identification (Level A) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool)</p>	Supports	<p>These modules provide descriptive error text to the user incase an invalid data is provided to one of the web controls or one of the mandatory fields is left blank at the time of submission.</p> <p>Tools:</p>



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602.3 (Support Docs)		<p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Check visually to make sure required star field indicator is present for all required fields and it reads properly using Assistive Technology such as screen reader (JAWS).</li><li>• Verify that a descriptive error message is displayed to the user incase, one of the mandatory fields is left blank at the time of form submission</li><li>• Verify that a descriptive error message is displayed to the user incase, valid user input is not provided to one of the web controls.</li><li>• Manually verify the markup to look for “aria-invalid” attribute to flag inputs with errors.</li></ul>
3.3.2 Labels or Instructions (Level A)  Also applies to:  2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>These modules provide descriptive text for labels and instructions for user input components. Standard HTML and WAI-ARIA attributes are used to associate labels and instructions to the user interface elements.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Check visually to make sure required star field indicator is present for all required fields and it reads properly using Assistive Technology such as screen reader (JAWS).</li><li>• Verify that a descriptive text is provided as a label or instructions, for every user input control on the webpage</li><li>• Verify that a descriptive error message is displayed to the user incase, one of the mandatory fields is left blank at the time of form submission</li></ul>



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		<ul style="list-style-type: none"><li>Verify that a descriptive error message is displayed to the user incase, valid user input is not provided to one of the web controls.</li><li>Manually verify the markup to look for “aria-describedby” or “aria-labelledby” attribute to describing relationships</li></ul>
4.1.1 Parsing (Level A)  Also applies to:  2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>These modules use semantically correct markup for all interface elements. The markup is programmatically generated to prevent parsing errors.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>Use Firefox plugin Wave toolbar and click on “Errors, Features and Alerts” button to identify any parsing error on the web page. Verify for any open tag errors.</li><li>Use Web Developer Toolbar to identify any parsing error on the web page.</li></ul>
4.1.2 Name, Role, Value (Level A)  Also applies to:  2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>These modules use standard HTML and WAI-ARIA attributes are used to describe the identity, operation and state of user interface elements</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>Using Assistive Technology such as screen reader (JAWS) and keyboard tabbing, the focus on the objects should move in a logical sequence to all fields and information (e.g., starting with a description of the first</li></ul>

Criteria	Conformance Level	Remarks and Explanations
		<p>name field, then to first name, description of the last name field, last name, etc.). In addition, we should be able to complete the form and submit it using only the keyboard.</p> <ul style="list-style-type: none"> <li>• Using Wave and Web Developer Tools verify the markup language for any error</li> <li>• Manually verify the user control attributes to check for clarity and meaningful description in context of the web page</li> </ul>

**Table 2: Success Criteria, Level AA**

Notes:

Criteria	Conformance Level	Remarks and Explanations
1.2.4 Captions (Live) (Level AA) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>Any live video that requires captions will be supported as needed.</p> <p>Tools:</p> <p>NVDA or JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Examine the video and determine if controls for alternate text or audio description are present.</li> <li>• Ensure using keyboard that video controls for alternate text or audio description are present and are accessible using different keystrokes.</li> <li>• View the video or presentation visually that has alternate text and captioning. Determine if the product has open or closed captioning. If it has open captioning, the product satisfies this standard because this type of captioning is always permanent. If the production has closed captioning, determine if the caption display is user selectable. Turn on the closed captions and view a part of the presentation that you know is captioned.</li> </ul>
1.2.5 Audio Description (Prerecorded) (Level AA) Also applies to: 2017 Section 508	Supports	<p>Any prerecorded/synchronized media that requires audio description will be supported as needed.</p> <p>Tools:</p>



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501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)		<p>NVDA or JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Examine the video and determine if controls for alternate text or audio description are present.</li><li>• Ensure using keyboard that video controls for alternate text or audio description are present and are accessible using different keystrokes.</li><li>• View the video or presentation visually that has alternate text and captioning. Determine if the product has open or closed captioning. If it has open captioning, the product satisfies this standard because this type of captioning is always permanent. If the production has closed captioning, determine if the caption display is user selectable. Turn on the closed captions and view a part of the presentation that you know is captioned</li></ul>
1.4.3 Contrast (Minimum) (Level AA)  Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>Any prerecorded/synchronized media that requires audio description will be supported as needed.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Test color indicative-check visually, if any image or color is used to represent an object, they should be tagged with the name or tooltip.</li><li>• Confirm visually that all hyperlinked text is indicated by a standard blue color defined for the application.</li><li>• Verify that any information conveyed with color is also conveyed through text or through another means that are accessible to Assistive Technology such as screen reader (JAWS).</li><li>• Print the page on a black and white printer or view on a monochrome monitor. Navigation and other information should still be obvious.</li><li>• Run Firefox browser, Juicy color contrast analyzer plugin to text contrast ratio of the page to be at least 4.5:1</li></ul>

Criteria	Conformance Level	Remarks and Explanations
		<p>exist between text, and images of text, and background behind the text.</p> <ul style="list-style-type: none"> <li>• Test visually using mouse inputs, to make sure that all links are distinguished in the web page from surrounding text with sufficient color contrast and has additional differentiation provided when the link receives focus, e.g., it becomes underlined.</li> </ul>
1.4.4 Resize text (Level AA) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>These modules user interface support standard zoom capabilities built into modern web browsers and operating systems</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Verify that all user interface controls on the web page are visible when the browser zoom is set to 200%.</li> <li>• Verify that all user interface controls on the web page function as per the requirement when the browser zoom is set to 200%</li> <li>• Verify that text on the web page is readable</li> <li>• Verify that the page content scales HTML consistently with the zoom.</li> </ul>
1.4.5 Images of Text (Level AA) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>These modules use standard text to convey the information rather than images of text except customizable or essential content such as logo. CSS is used to control the visual presentation of the text.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Verify that all user interface controls on the web page are visible and information is displayed in standard text. •</li> </ul>



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2.4.5 Multiple Ways (Level AA)  Also applies to: 2017 Section 508 501 (Web)(Software) – Does not apply to non-web software 504.2 (Authoring Tool) 602.3 (Support Docs) – Does not apply to non-web docs	Supports	<p>If applicable, verify the custom text present on the web page and ensure meaningful description is provided.</p> <ul style="list-style-type: none"><li>• If applicable, verify the essential content like logo is present on the web page and corresponding “alt” attribute is populated with meaningful information.</li></ul>
2.4.6 Headings and Labels (Level AA)  Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>These modules provide multiple ways to access a web page except where the Web Page is the result of, or a step in, a process. Navigation links, search functions and table of contents (TOC) are provided across the application for easy access to information.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Using Assistive technology (Jaw's screen reader) and keyboard, click on all the different links on the web page and make sure JAWS can read the links properly.</li><li>• Verify that all the link on the page is accessible and navigates to the related information</li><li>• If applicable, verify all the links in the table of content (TOC) navigates to the related information</li></ul>



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		<p>using Assistive Technology such as screen reader (JAWS).</p> <ul style="list-style-type: none"><li>Verify that a descriptive text is provided as a label or instructions, for every user input control on the webpage</li><li>Verify that a descriptive and related heading is provided for each web page.</li><li>Manually verify the markup to look for “aria-describedby” or “aria-labelledby” attribute to describing relationships</li></ul>
<p>2.4.7 Focus Visible (Level AA) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>These modules use visual changes to elements to indicate the current position of focus</p> <p>Tools: NVDA or JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>Use the keyboard shortcuts on a Firefox or IE browser (Tab, [Shift+Tab], Space bar, Alt, arrow keys, Enter, etc.) to move the focus to and ensure all application functions are executable and the result of performing a function is distinguished textually.</li><li>Check for the visual focus that moves with keyboard navigation. This is typically a dotted rectangle that outlines a button or link or a vertical bar in a text field.</li><li>If there is dialog or overlay functionality in the application, make sure that you can switch focus back and forth between dialogue and the main application page.</li></ul>
<p>3.1.2 Language of Parts (Level AA) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>These modules use the language attribute on the HTML element to specify the default language of the web page. However, if required, subset of pages can be manually tested to confirm multiple languages.</p> <p>Tools:</p>



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		<p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Use Firefox plugin Wave toolbar and click on “Errors, Features and Alerts” button to identify any “lang” and/or “xml: lang” attribute missing from the page and perform manual testing using Firefox firebug plugin to identify the meaningful value for “lang” and/or “xml: lang” attribute is provided</li><li>• Manually, search the HTML source for “lang” and/or “xml: lang” attribute to ensure that the value reflects the primary language used by the web page or subset of the page.</li></ul>
<p>3.2.3 Consistent Navigation (Level AA)</p> <p>Also applies to:</p> <p>2017 Section 508</p> <p>501 (Web)(Software) – Does not apply to non-web software</p> <p>504.2 (Authoring Tool)</p> <p>602.3 (Support Docs) – Does not apply to non-web docs</p>	Supports	<p>These modules use same navigation mechanism across the web page.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Use assistive technology tools to identify the web controls and links on the web page.</li><li>• Manually verify the layout of the buttons and general controls on the page is meaningful.</li><li>• For repeated web controls, manually verify the relative layout of the buttons and general controls is consistent across all the web pages</li><li>• Verify that all the link on the page is accessible and navigates to the related information</li><li>• For repeated links, manually verify that the links or programmatic references are always in the same relative order.</li></ul>
<p>3.2.4 Consistent Identification (Level AA)</p> <p>Also applies to:</p>	Supports	<p>These modules use standard component library to ensure consistency in functionality and presentation across the pages.</p>



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2017 Section 508  501 (Web)(Software) – Does not apply to non-web software  504.2 (Authoring Tool)  602.3 (Support Docs) – Does not apply to non-web docs		<p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Use assistive technology tools such as WAVE and JAWS, to identify the web controls and links on the web page</li><li>• Verify the “Alt-text” or label information for every user control is descriptive and meaningful with respect to its function.</li><li>• Verify the associated text is identical for each user interface component with the same function for example “Submit” or “Save” buttons should behave identically across all the web pages</li></ul>
3.3.3 Error Suggestion (Level AA)  Also applies to:  2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)	Supports	<p>These modules provide descriptive error text to the user incase an invalid data is provided to one of the web controls or one of the mandatory fields is left blank at the time of submission.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Check visually to make sure required star field indicator is present for all required fields and it reads properly using Assistive Technology such as screen reader (JAWS).</li><li>• Verify that a descriptive error message is displayed to the user incase, one of the mandatory fields is left blank at the time of form submission</li><li>• Verify that a descriptive error message is displayed to the user incase, valid user input is not provided to one of the web controls.</li></ul>



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		<ul style="list-style-type: none"> <li>Manually verify the markup to look for “aria-invalid” attribute to flag inputs with errors.</li> </ul> <p>Manually verify the markup to look for “aria-required” attribute to identify the required fields.</p>
<p>3.3.4 Error Prevention (Legal, Financial, Data) (Level AA) Also applies to: 2017 Section 508 501 (Web)(Software) 504.2 (Authoring Tool) 602.3 (Support Docs)</p>	Supports	<p>These modules incorporate methods to prevent errors such as checking for input errors, ensuring that submissions are reversible, and allowing users to review and confirm information prior to submission.</p> <p>Tools: WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>Manually verify that confirmation or checkboxes are available for user to select whenever data deletion or updates are being performed.</li> <li>Verify that prior to submission of the form a confirmation page is displayed for user to verify the action.</li> </ul>

**Table 3: Success Criteria, Level AAA**

Notes: These modules have not been evaluated for WCAG 2.0 Level AAA conformance.

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**Chapter 3: Functional Performance Criteria (FPC)**

Criteria	Conformance Level	Remarks and Explanations
302.1 Without Vision	Supports	<p>These modules use standard HTML and WAI-ARIA attributes to describe the identity, operation, and state of user interface elements to Assistive Technologies.</p> <p>Tools: WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p>



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Criteria	Conformance Level	Remarks and Explanations
		<p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Make sure all the features and functionalities of the application are available to use with Assistive Technology such as screen reader (JAWS) for the users who are blind or visually impaired.</li><li>• For the video or presentations, check visually to ensure if the background screens in the product are described properly.</li></ul>
302.2 With Limited Vision	Supports	<p>These modules support standard browser magnification and contrast adjustments.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Make sure all the features and functionalities of the application are available to use with Assistive Technology such as screen reader (JAWS) for the users who are blind or visually impaired.</li><li>• For the video or presentations, check visually to ensure if the background screens in the product are described properly.</li></ul>
302.3 Without Perception of Color	Supports	<p>These modules are designed so that all the information conveyed with color is also available without color using alternative text or tooltips. Color coding is not used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p>



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		<ul style="list-style-type: none"><li>• Check visually to make sure required star field indicator is present for all required fields and it reads properly using Assistive Technology such as screen reader (JAWS).</li><li>• Print the application page without color on a black and white printer and verify that all information is still conveyed.</li><li>• Make sure visually, each module of the application and identify each special function or item, including error messages, that are encoded using color.</li><li>• Test color indicative-check visually, if any image or color is used to represent an object, they should be tagged with the name or tooltip.</li><li>• Confirm visually that all hyperlinked text is indicated by a standard blue color defined for the application.</li><li>• Verify that any information conveyed with color is also conveyed through text or through another means that are accessible to Assistive Technology such as screen reader (JAWS).</li><li>• Print the page on a black and white printer or view on a monochrome monitor. Navigation and other information should still be obvious.</li><li>• Run Firefox browser, Juicy color contrast analyzer plugin to text contrast ratio of the page to be at least 4.5:1 exist between text, and images of text, and background behind the text.</li><li>• Test visually using mouse inputs, to make sure that all links are distinguished in the web page from surrounding text with sufficient color contrast and has additional differentiation provided when the link receives focus, e.g., it becomes underlined.</li></ul>
302.4 Without Hearing	Supports	<p>Any audio-only and video-only media content that is prerecorded will be supported as needed.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p>



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		<p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Make sure all the features and functionalities of the application are available to use with Assistive Technology such as screen reader (JAWS) for the users who are deaf or hard of hearing.</li><li>• For the videos, visually determine whether open or closed captioning is available.</li></ul>
302.5 With Limited Hearing	Supports	<p>Any audio-only and video-only media content will be supported as needed.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Make sure all the features and functionalities of the application are available to use with Assistive Technology such as screen reader (JAWS) for the users who are deaf or hard of hearing.</li><li>• For the videos, visually determine whether open or closed captioning is available.</li></ul>
302.6 Without Speech	Supports	<p>These modules do not require speech as the input, but it will be supported as needed.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Make sure all the features and functionalities of the application are available to use with Assistive Technology such as screen reader (JAWS) and keyboard are available for the people with disabilities</li></ul>
302.7 With Limited Manipulation	Supports	These modules support standard input mechanisms such as user-provided keyboards and pointing devices. Usage



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		<p>of the product does not require fine motor controls nor simultaneous actions.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Make sure all the features and functionalities of the application are available to use with Assistive Technology such as screen reader (JAWS) and keyboard.</li></ul>
302.8 With Limited Reach and Strength	Supports	<p>These modules support standard input mechanisms such as user-provided keyboards and pointing devices and is operable with limited reach and limited strength.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Make sure all the features and functionalities of the application are available to use with Assistive Technology such as screen reader (JAWS) and keyboard are available for the people with disabilities</li></ul>
302.9 With Limited Language, Cognitive, and Learning Abilities	Supports	<p>These modules support standard input mechanisms such as user-provided keyboards and pointing devices.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Make sure all the features and functionalities of the application are available to use with Assistive</li></ul>



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		Technology such as screen reader (JAWS) and keyboard are available for the people with disabilities

#### Chapter 4: Hardware

Notes: These modules are a web software application and is not subject to the requirements of this section

#### Chapter 5: Software

Criteria	Conformance Level	Remarks and Explanations
501.1 Scope – Incorporation of WCAG 2.0 AA	See <a href="#">WCAG 2.0</a> section	See information in WCAG section
<i>502 Interoperability with Assistive Technology</i>	Heading cell – no response required	Heading cell – no response required
502.2.1 User Control of Accessibility Features	Not Applicable	These modules are not considered as platform software as defined by Section 508
502.2.2 No Disruption of Accessibility Features	Supports	<p>These modules are compatible with operating system and browser accessibility features configured by the user</p> <p>Tools:</p> <p>NVDA or JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>On Windows 7 operating system, Click on Start &gt; Settings &gt; Control Panel. Double click on the Accessibility Options icon and activate all the accessibility features. The Sticky Keys, MouseKeys and other options should still work with the application successively.</li><li>Run screen reader (JAWS) with the application. None of the Assistive Technology (AT) such as screen reader (JAWS) features should be overridden by the product being tested.</li></ul>
<i>502.3 Accessibility Services</i>	Heading cell – no response required	Heading cell – no response required
502.3.1 Object Information	Supports	These modules use standard HTML and WAI-ARIA attributes are used to describe the identity, operation and

Criteria	Conformance Level	Remarks and Explanations
		state of user interface elements. This includes using “aria-invalid” and “aria-required” attributes
502.3.2 Modification of Object Information	Supports	These modules use standard HTML and WAI-ARIA object roles for compatibility with the assistive technologies
502.3.3 Row, Column, and Headers	Supports	<p>These modules use standard HTML attributes to define table structure and relationships, including column headers.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Test data tables manually using Firefox browser Firebug tool or Juicy color contrast table inspector plugin to identify the &lt;th&gt; and scope attribute elements are present to identify each row header and each column header. This can also be achieved by Firefox browser WAVE toolbar.</li> <li>• Use an Assistive Technology such as screen reader (JAWS) to make sure that the row and column headers of the data table are identified correctly when read by a screen reader. For example, when using JAWS, use the CTRL + ALT + Arrow keys to navigate the table and CTRL + ALT + NumPad 5 to speak the information in the cell which has focus. Also test if the summary attribute is available and reads properly for complex tables.</li> <li>• The tables do not contain tabular data and are only used for the visual layout; thus, this standard does not apply. Human judgment should be used to determine whether a table is used only for layout purposes, and this standard will not apply to such tables.</li> </ul>
502.3.4 Values	Supports	These modules use standard HTML and WAI-ARIA object roles for compatibility with the assistive technologies

Criteria	Conformance Level	Remarks and Explanations
502.3.5 Modification of Values	Supports	These modules use standard HTML and WAI-ARIA object roles for compatibility with the assistive technologies
502.3.6 Label Relationships	Supports	<p>These modules provide descriptive text for labels and instructions for user input components. Standard HTML and WAI-ARIA attributes are used to associate labels and instructions to the user interface elements.</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Check visually to make sure required star field indicator is present for all required fields and it reads properly using Assistive Technology such as screen reader (JAWS).</li> <li>• Verify that a descriptive text is provided as a label or instructions, for every user input control on the webpage</li> <li>• Verify that a descriptive error message is displayed to the user incase, one of the mandatory fields is left blank at the time of form submission</li> <li>• Verify that a descriptive error message is displayed to the user incase, valid user input is not provided to one of the web controls.</li> <li>• Manually verify the markup to look for “aria-describedby” or “aria-labelledby” attribute to describing relationships</li> </ul>
502.3.7 Hierarchical Relationships	Supports	These modules use standard HTML markup to express hierarchical relationships
502.3.8 Text	Supports	These modules render strings as plain text values in HTML for compatibility with assistive technologies
502.3.9 Modification of Text	Supports	These modules render strings as plain text values in HTML for compatibility with assistive technologies.
502.3.10 List of Actions	Supports	These modules use standard HTML, or an ARIA object attributes for compatibility with assistive technologies



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Criteria	Conformance Level	Remarks and Explanations
502.3.11 Actions on Objects	Supports	These modules use standard HTML, or an ARIA object attributes for compatibility with assistive technologies.
502.3.12 Focus Cursor	Supports	These modules use visual changes to elements to indicate the current position of focus.
502.3.13 Modification of Focus Cursor	Supports	These modules use standard HTML elements with standard cursor controls for user input.
502.3.14 Event Notification	Supports	These modules alert the user whenever a timed response is required and given sufficient time to indicate more time is required using keyboard or mouse inputs.
502.4 Platform Accessibility Features	Supports	These modules support platform accessibility features such as API and DOM
<i>503 Applications</i>	Heading cell – no response required	Heading cell – no response required
503.2 User Preferences	Supports	These modules support user preferences from platform or operating system settings for color, contrast, font type, and focus cursor.
503.3 Alternative User Interfaces	Not Applicable	These modules do not provide any alternative user interface that function as assistive technology
<i>503.4 User Controls for Captions and Audio Description</i>	Heading cell – no response required	Heading cell – no response required
503.4.1 Caption Controls	Supports	These modules will support the captions for any audio-only or video only content whether is it pre-recorded or live
503.4.2 Audio Description Controls	Supports	These modules will support the audio description controls for any audio-only or video only content whether is it pre-recorded or live
<i>504 Authoring Tools</i>	Heading cell – no response required	Heading cell – no response required
504.2 Content Creation or Editing (if not authoring tool, enter “not applicable”)	See <a href="#">WCAG 2.0</a> section	See information in WCAG section
504.2.1 Preservation of Information Provided for Accessibility in Format Conversion	Supports	These modules will allow data to be updated or modified in plain text source code

Criteria	Conformance Level	Remarks and Explanations
504.2.2 PDF Export	Supports	These modules provide capability to export the content in PDF format
504.3 Prompts	Supports	These modules provide prompts to the users generate PDF format of the content or any other required content format
504.4 Templates	Supports	These modules will support providing templates to the users to create content that confirms to Level A and Level AA standards.

## Chapter 6: Support Documentation and Services

Criteria	Conformance Level	Remarks and Explanations
601.1 Scope	Heading cell – no response required	Heading cell – no response required
602 Support Documentation	Heading cell – no response required	Heading cell – no response required
602.2 Accessibility and Compatibility Features	Supports	<p>The required support documentation for These modules will enlist the detailed functionality and provide details on the built-in accessibility features and features that are accessible using assistive technologies</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"> <li>• Make sure that supporting documentation such as user guides, training materials or wiki help content are available for end-users to access and are accessible with Assistive Technology such as screen reader (JAWS).</li> <li>• Test visually and using keyboard to make sure that accessibility link is available in the footer information area in all the web pages of the application.</li> </ul>
602.3 Electronic Support Documentation	See <a href="#">WCAG 2.0</a> section	See information in WCAG section



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Criteria	Conformance Level	Remarks and Explanations
602.4 Alternate Formats for Non-Electronic Support Documentation	Supports	<p>The support documentation for These modules will be made available to end-users in alternate formats upon request</p> <p>Tools:</p> <p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, Acrobat Professional 11, MS Word2010 or above Accessibility Checker, MS Power-Point 2010 or above accessibility checker and NVDA/JAWS</p> <p>Test Procedure:</p> <ul style="list-style-type: none"><li>• Make sure that supporting documentation such as user guides, training materials or wiki help content are available for end-users to access and are accessible with Assistive Technology such as screen reader (JAWS).</li><li>• Testing word document for Section 508 Compliance. MS Word 2010 documents shall be made Section 508 compliant to meet the standard requirements. Using Microsoft Word 2010 or above, run the accessibility test by using Accessibility Checker under the File &gt; Info &gt; Check for issues button &gt; Check Accessibility to verify the errors.</li></ul> <p>Test to ensure the following:</p> <ul style="list-style-type: none"><li>- If the document has been formatted using Style elements (Heading 1, Heading 2) and/or Outline in a hierarchical manner (i.e., Heading 1 to Heading 2 to Body Text).</li><li>- Visually inspect if comments have been removed and formatting marks been turned off.</li><li>- Has alternative text been appropriately applied to all images, objects and form field elements?</li><li>- Does descriptive text appear immediately after the image for complex graphic like charts or graphs?</li><li>- Are multiple associated images on the same page (e.g., boxes in an organizational chart) grouped as one object?</li><li>- Is the document free of background images or watermarks?</li></ul>

Criteria	Conformance Level	Remarks and Explanations
		<ul style="list-style-type: none"> <li>- Do all tables have Row and Column headers and are being used to being used to create a tabular structure (not tabs or spaces)?</li> <li>- Do tables have a logical reading order from left to right, top to bottom?</li> <li>- Verify if tables are free of Merged Cells.</li>   <li>• Test Power-Point document for 508 compliances</li> <li>• Test to ensure the following:</li> <li>- Do all slides have unique titles?</li> <li>- Do all slide text be viewed in the Outline View?</li> <li>- Do all slides that contain hyperlinks have active links?</li> <li>- Overall contrast in the presentation high and orange, red, and green color is not used in the slides template and text.</li> <li>- Has alternative text been appropriately applied to all images, objects and form field elements?</li> <li>- Does descriptive text appear immediately after the image for complex graphic like charts or graphs?</li> <li>- Are multiple associated images on the same page (e.g., boxes in an organizational chart) grouped as one object?</li> <li>- Do all the slides that have charts on them have Title, Legend and Axis (X &amp; Y) labels</li> <li>- Do all tables have Row and Column headers and are being used to being used to create a tabular structure (not tabs or spaces)?</li>   <li>• Test PDF document for 508 compliances</li> </ul> <p>Use Adobe Acrobat Professional 8 and later test run the two reports below with 0 errors: Please select Advance&gt;Accessibility&gt; Full check, Under Name.</p> <p>Test to ensure the following:</p> <ul style="list-style-type: none"> <li>- Does the document contain actual text?</li> <li>- Scanned representations of text are not accessible.</li> </ul>



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Criteria	Conformance Level	Remarks and Explanations
		<ul style="list-style-type: none"><li>- Does content follow a logical reading order?</li><li>- Are tabbed elements placed in a logical tab order?</li><li>- Are the images placed in a logical order when a word document is converted to pdf?</li><li>- Has the document been tagged and has a clear document structure been defined?</li><li>- Has alternative text been appropriately applied to all images, objects and form field elements?</li><li>- Do data tables contain Column or Row header tags?</li><li>- Are elements that should be ignored by a screen reader tagged as artifacts?</li><li>- Are hyperlinks active and linked to the appropriate destination?</li><li>- Are bookmarks labeled properly and linked to the appropriate destination?</li></ul>
603 Support Services	Heading cell – no response required	Heading cell – no response required
603.2 Information on Accessibility and Compatibility Features	Supports	<p>These modules will provide “Accessibility” information page link from the footer information area in all the pages to provide description of the accessibility and compatibility features.</p> <p><b>Tools:</b> WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p><b>Test Procedure:</b></p> <ul style="list-style-type: none"><li>• Test visually and using keyboard to make sure that accessibility link is available in the footer information area in all the web pages of the application.</li></ul>
603.3 Accommodation of Communication Needs	Supports	<p>These modules will provide “Contact Us” link across all the web pages with proper information for communication needs for the end-users with disabilities.</p> <p><b>Tools:</b></p>

Criteria	Conformance Level	Remarks and Explanations
		<p>WAVE, Color Contrast Analyzer, Web Developer Toolbar, and NVDA/JAWS</p> <p><b>Test Procedure:</b></p> <ul style="list-style-type: none"> <li>• Make sure visually and using keyboard ‘Contact Us’ links are available in the footer information and top right-side navigation area in all the web pages of the application. The contact us page should contain all communication needs for the end-users with disabilities such support service email and phone number.</li> </ul>

#### Disclaimer

Notes: This report covers the degree of conformance for Web Content Accessibility Guidelines 2.0 Level A, Level AA and Section 508 as published in 2017. Therefore, tables and other details regarding European standards have been re