



Atebion, LLC

Solutions is Our Name

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How to Generate a Responsibility Matrix in 5 Steps

10.02.2018

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Atebion Professional Document Analyzer

Professional Document Analyzer Tom Lipscomb Copyright © 2018 -- Release 5.7.20.18 -- Expires in 259 Days on Thursday, May 16, 2019

Tools [Grid] [Crosshair] [Magnifying Glass] [A] [Speaker]

Atebion, LLC Solutions is our name

Welcome ⓘ

Discover the Professional Document Analyzer

The Professional Document Analyzer is a document analysis tool for Proposal Managers and Contract Managers. It is actually a collection of tools to save you time, quickly identify non-compliance, pinpoint RFP changes and improve readability of your documents.

Simplicity + Flexibility...

- Analyze Segments, Paragraphs, and Sentences Levels
- Work Alone or in Team Environments (Workgroups)
- Compliance Matrix (customizable)
- Storyboards (customizable)
- Win Themes, Discriminators, Risks and others
- Responsibility Matrix (customizable)
- Excel and MS Word Templates
- Compare Documents
- Readability Analysis
- Text-to-Speech
- Annotation Throughout
- Acronym Checker (AcroSeeker)

NEW Concept Analyzer helps you...

- Make better Bid/No-Bid decisions
- Identify Legal and other Risks
- Increase your pWin Rate with more equivalent language in proposals
- Confirm Compliance by Spotting Gaps
- Identify Federal Acquisition Regulations (FAR)
- Compare Resumes to quickly identify the person best suited for the position

Shipley Associates

Shipley Training and Certification Services

Blended learning from experts who know how to win

Build lasting capability through the most respected training curriculum available in the industry today. Leverage Shipley's blended learning approach (onsite, online, and self-paced) to train and certify in industry-proven best practices and tools. <http://www.shipleywins.com/training.php>

Close Matrix Keywords Tools **Next** Help Train Me

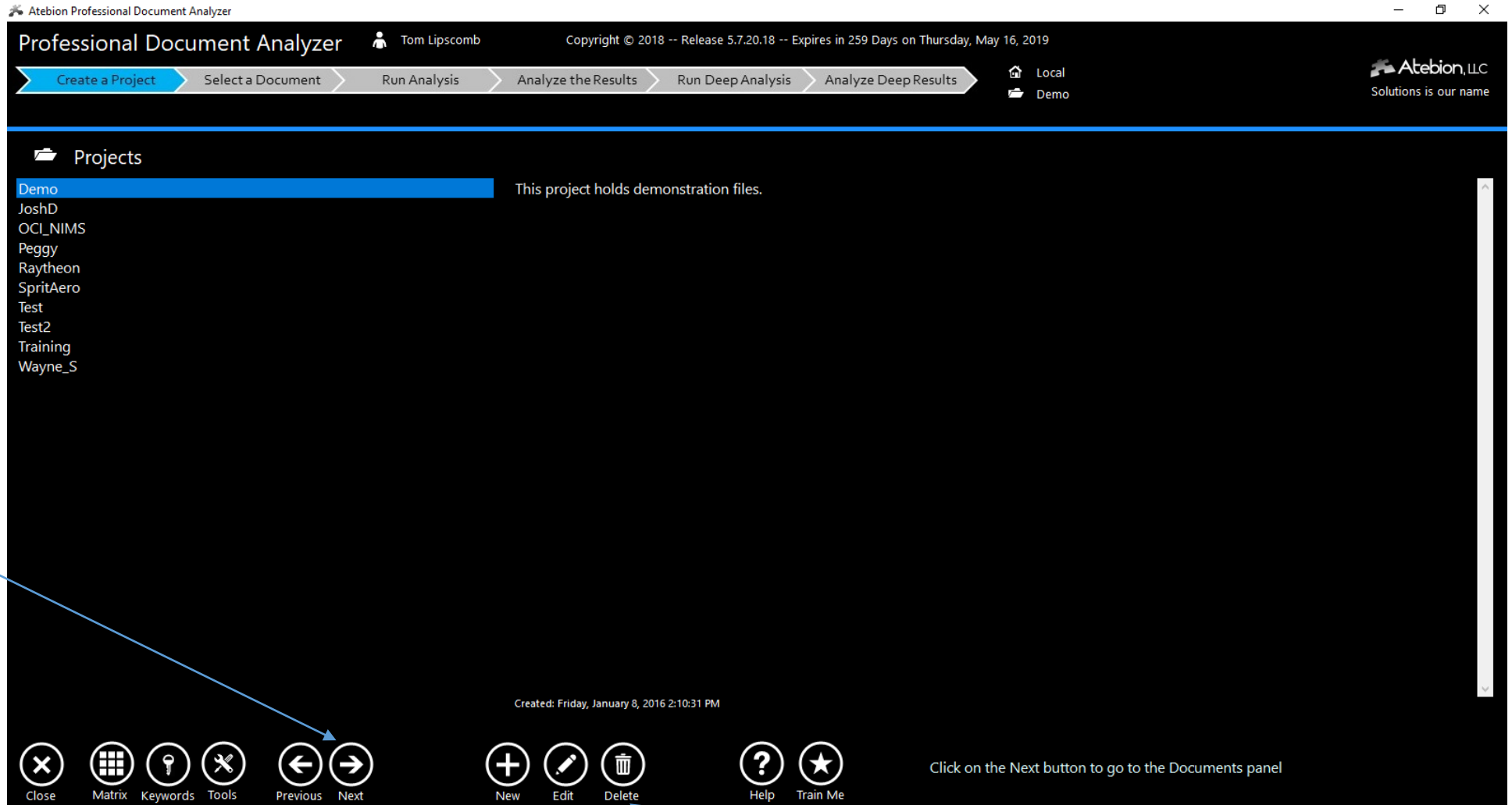
Workgroups Select a Workgroup C:\Users\Tom\AppData\Local\Atebion DA Local Test5 Members

Click the Next button to Start



A project is used to hold documents, much like a folder.

Once you have selected a Project, click the next button to go to the Document panel.



Click to create a new Project

Click to remove the selected Project

Click to change the selected Project's description



The Document panel holds documents for your selected Project.

Edit your imported Document to remove content you don't want to shred/parse

Once you have selected a Document, click the next button to go to the Analyze panel.

Click to import a new Document

Click to replace the selected Document

Click to remove the selected Document



The Analyze panel shreds/parses and identifies selected Keywords for your current Document.

Check Find Whole Words

Select the Responsibility Keyword Group.

If you have run the Analyzer previously on the current Document, you can click on the Next button to go to the Analysis Results panel.

Click the Analyze button to shred/parse your current Document

The screenshot shows the 'Professional Document Analyzer' application window. At the top, there's a navigation bar with steps: 'Create a Project', 'Select a Document', 'Run Analysis' (highlighted), 'Analyze the Results', 'Run Deep Analysis', and 'Analyze Deep Results'. Below this, the 'Analyze' panel is active. It features a 'Parse Type' section with radio buttons for 'Legal Documents' and 'Paragraphs'. A 'Keyword Groups' list on the left includes 'Responsibility', which is selected. A 'Selected Keywords' list on the right includes 'Find Whole Words', which is checked. A 'Find Instructions/Questions' checkbox is also present. The main area contains a text box with instructions: 'The Analyzer has been run previously. - Click the 'Next' button at the bottom of the application to go to the Analysis Results. - Notice: If you run the Analyzer again, it will overwrite the current Analysis Results.' Below this is a 'LEGAL DISCLAIMER' and another disclaimer: 'ALSO WE EXPRESSLY DISCLAIM ALL LIABILITY FOR THE USE OF THE PROFESSIONAL DOCUMENT ANALYZER OR INTERPRETATION OF ANALYSIS RESULTS AND OTHER DATA/INFORMATION.' At the bottom, there's a toolbar with buttons for 'Close', 'Matrix', 'Keywords', 'Tools', 'Previous', 'Next', 'Analyze', 'Help', and 'Train Me'. A text prompt at the bottom right says 'Click on the Next button to go to the Analysis Results'.



The Analysis Results panel lets you to review, annotate, split/combine your shredded analysis results.

Click to generate a Responsibility Matrix

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Create a Project Select a Document Run Analysis **Analyze the Results** Run Deep Analysis Analyze Deep Results

Review the Analysis Results. Annotate segments/paragraphs, Split & Combine parsed segments/paragraphs, Export Results, or Run Readability Tests on your document.

Local Demo T-ADC(X) Ship RFP Section C

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Analysis Results Quantity of Segments: 58

Parsed Segments Show Document

Number	Caption	Keywords	Page
Header Area	Header Area	shall [1]	1
(a)	The provisions of this contract;		1
(b)	System Specification, Attachment J-1;		1
(c)	Other documents, exhibits, and attachments ...		1
(d)	All revisions and modifications thereto dated ...		1
1.0	GENERAL	require [1], shall [2]	1
1.1	MANAGEMENT.		1
1.1.1	PROGRAM MANAGEMENT.	require [3], shall [5]	1
1.1.2	MANAGEMENT PLAN(S).	require [2], shall [5], will [2]	1
1.1.3	RESOURCE AND WORK SCHEDULE.		2
1.1.3.1	SCHEDULE(S).	critical [1], require [1], shall [5]	2
1.1.3.2	CONTRACT WORK BREAKDOWN STRUCTURE (CWBS).	may [1], shall [5]	2
1.1.3.3	EARNED VALUE MANAGEMENT SYSTEM.	shall [6], will [2]	2
1.1.4	REQUIREMENTS MANAGEMENT.	require [4], shall [2]	3

Notes Notes are displayed in the Matrix Builder and included in Exports.

Microsoft Sans Ser 9

Kathy, please review this requirement.

Search Keywords 7 Exported 21 Summary Quality Check

Selected Segment

1.1.1 PROGRAM MANAGEMENT.
The Contractor shall apply a multi-functional approach to the integrated, concurrent development of the products and the associated processes applicable to the design, ship systems integration, construction, testing, logistics support and in the performance of all other efforts required by this Contract.
The Contractor shall provide the management effort necessary to ensure effective cost, schedule and technical performance under this Contract. The Contractor shall manage the program in accordance with Contract requirements, the management plan(s), and work schedule(s). The Contractor shall fully integrate major subcontractors and vendors to provide overall direction and guidance, track progress and status, and integrate products and services provided by major subcontractors and vendors' with the products and services provided by the Contractor.
The Contractor shall identify problems and potential problems that could adversely impact ship performance, cost and/or delivery schedule accompanied by proposed solutions in accordance with the general requirement of Section C entitled "CONTRACTOR PROBLEM IDENTIFICATION REPORTS".

Close Matrix Keywords Tools Previous Next Help Train Me

Click on the Help button to learn about features on this panel

Download Excel Templates, see link for instructions:

<https://atebionllc.com/pdfs/How to Download Starter Compliance Matrix Templates.pdf>



Export Analysis Results popup window is shown when you click the Export button on the Analysis Results panel.

Excel Templates drop-down list is NOT displayed until you either Download or create Excel Templates.

Select the ResponsibilityMatrix_Page template

If you don't see this template, you will need to download it, see the link below.

Select the With Only Keywords

Click to generate a Responsibility Matrix

Download Excel Templates, see link for instructions:

<https://atebionllc.com/pdfs/How to Download Starter Compliance Matrix Templates.pdf>



This is an example of a Responsibility Matrix based on the previous steps.

Remember you can customize your templates and Keyword Groups to generate your own custom reports, matrices, and lists.

HHS Indian Medical Claims Processing 8_13.xlsx - Excel

42d. TOTAL CONTAINERS

Page	Ref	Content	Business Unit	Assigned To
11	2.1.	2.1. Alternate Resources (Third Party Payer) - Resources other than those of the PRC program, which are available and accessible to the Indian patient such as health care providers and institutions (including facilities operated by the IHS), health payment sources or other health care programs (e.g., Medicare or Medicaid), other Federal, State, local or private insurance for which the individual may be eligible.		
11	2.2	2.2 Area Office - The second echelon level organizational unit in the IHS responsible for supporting the administrative, management and clinical system of health care unique to its population. There are 12 IHS Area Offices covering the 32 Reservation States.		
11	2.3	2.3 Billed Charges - Total charges billed by a health care provider ; it shows the gross billed or retail price of services offered by the provider and does not represent the amount paid by the beneficiary or the amount collected by the provider . It is the amount which is reimbursed when the provider has no contract in place, or when the contract, rate quote or agreement is for payment at the providers normal billed rate.		
11	2.6	2.6 Closed Document - A document (PDO/obligation) in the IHS accounting system which indicates a final payment has been made.		
11	2.9	2.9 Contracting Officer Representative (COR) - Qualified individual appointed by the Contracting Officer who is responsible for providing technical oversight and monitoring of contract administration and contractor performance.		
11	2.10	2.10 Coordination of Benefits (COB) - The process used to determine which insurance plan has the primary payment responsibility and the extent to which the other plans will contribute when an individual is covered by more than one plan .		
11	2.11	2.11 Cost Savings - A sum of money that was not expended as a result of an IHS contract, rate quote, or agreement with a provider to accept reimbursement at less than the normal billed charges.		
12	2.12	2.12 Current Year Claim - Claims submitted to the Contractor for payment for services that occurred during the current fiscal year (October 1 - September 30).		
12	2.13	2.13 Detail of Remittance (DOR) - Document that accompanies each payment to a provider , and displays patient name, claim, and payment calculation information or it may be sent to a provider without payment explaining why services were rejected for payment, and any applicable instructions to the provider regarding resubmission.		

Responsibility Matrix

READY 90%