

ATTACHMENT H – DEFINITIONS

With the exception of terms identified herein, the defined terms in Chapters 60A-1, 74-1, and 74-2, Florida Administrative Code (F.A.C.), apply, and are found at:

<http://www.flrules.org/Gateway/reference.asp?No=Ref-06494>

AAA: Area Agency on Aging. A public or nonprofit private agency in a planning and service area, designated by the Department to coordinate and administer the department's programs and to provide, through contracting agencies, services within a planning and service area. An area agency on aging serves as both the advocate and the visible focal point in its planning and service area to foster the development of comprehensive and coordinated service systems to serve older individuals. See definition for ADRC.

Acceptance Criteria: Pre-defined performance requirements and essential conditions that Deliverables are measured against before they are considered complete and acceptable.

Acceptance: A written notification from the Department to the Contractor that a Deliverable has been reviewed and is judged by the Department to meet its Acceptance Criteria.

ACCESS: Automated Community Connection to Economic Self-Sufficiency: A program administered by the Department of Children and Families (DCF) that allows clients to apply for public assistance benefits online. ACCESS staff determine financial eligibility for Medicaid long-term care services. See Social Security Income (SSI)-Related (public assistance for the aged, blind, and disabled) Programs Factsheet: <http://www.dcf.state.fl.us/programs/access/docs/ssifactsheet.pdf>

Action Plan: A corrective action plan requested by the Department from the Contractor pursuant to Section 19.3 ("Action Plans and Step-In Rights") of the Contract.

ADRC: Aging and Disability Resource Center: A single, coordinated system for information and access to services for all Floridians seeking long-term care resources. The ADRCs provide information and assistance about state and federal benefits, as well as available local programs and services. This system also offers the public access to a statewide database of local community resources, available on the internet or by calling the Elder Helpline toll-free at 1-800-96 ELDER (1-800-963-5337). The ADRCs are operated by the 11 Area Agencies on Aging.

Agency Business System: A system owned and managed by an agency, which interfaces with CIRTS and/or assists agencies in the performance of client management functions.

Agency for State Technology (AST): The Agency established in 2014 by the Florida Legislature to oversee the State's essential technology projects and house Florida's Chief Information Officer. Website: <http://www.ast.myflorida.com/index.asp>

Agency: As the context requires, means an, authority, council, committee, department, division, bureau, board, section, or entity of government that uses or interacts with CIRTS.

AHCA: Agency for Health Care Administration: The single state agency that is responsible for administering the Medicaid program. AHCA is responsible for enforcing federal Medicaid policies

and procedures and developing state Medicaid policies and procedures. They are also responsible for licensure and regulation of Florida's health facilities. Medicaid program handbooks can be accessed at:

<http://portal.flmmis.com/FLPublic/Provider ProviderServices/Provider ProviderSupport/Provider ProviderSupport ProviderHandbooks/tabId/53/Default.aspx>

APD: Agency for Persons with Disabilities: The agency that provides critical services and supports for persons with developmental disabilities to allow them to reach their full potential in the home and community. The agency also performs PASRR Level II screenings for suspected intellectual disabilities. The agency serves people with autism, cerebral palsy, Spina Bifida, intellectual disabilities, Down syndrome, Prader-Willi syndrome, Phelan McDermid syndrome, and children age 3-5 who are at a high risk of a developmental disability.

Applicable Law: Any legislation, statute, regulation, ordinance, rule, judgment, order, decree, ruling, or other requirement enacted, promulgated, or imposed by any governmental authority or judicial or regulatory body (including any self-regulatory body) at any level (e.g., municipal, county, provincial, state or national) that is applicable to or enforceable against a party or governs its activities under or in connection with this Contract.

Authorized User: Any person(s) who has permission to use Department and/or various functions pertaining to their specific job requirements.

Best and Final Offer (BAFO): A revised, final Reply that the State may request from a Respondent(s) following initial Contract negotiations.

BPR: Business process reengineering.

Bureau of Information Technology (BIT): The bureau within the Florida Department of Elder Affairs that plans, manages, and operates the DOEA information technology resources. BIT is the technical owner of all Department applications including CIRTS.

Business Day: Days in which the department conducts routine business. This is typically Monday through Friday from 8 a.m. to 5 p.m. local time, excluding evenings, weekends and department observed holidays. Any reference to day(s) is defined as a business day unless otherwise specified.

Business Function Testing: The start-to-finish global testing of an entire business function. Business Function Testing tests business function cycles of the simulating real-life usage as closely as possible, and is based on the lifecycle of the core functions that the business function is expected to perform.

Business Hours: 8 AM to 5 PM on all Business Days.

Business Process Standardization (BPS): The eCIRTS Project Track responsible for developing and executing business process standardization activities.

Business Requirements: The functional and technical requirements for the Solution.

Calendar Day: All days, including weekends and holidays.

Care Plan: An individualized written plan of care that identifies the assessed needs of a client and how the needs will be met with the provision of services. The care plan includes the services, duration, frequency, and provider of the services.

CARES: Comprehensive Assessment and Review for Long Term-Care Services: A program operated by the Department of Elder Affairs through an interagency agreement with Agency for Health Care Administration (AHCA) that is Florida's federally mandated pre-admission screening program for long-term care services. CARES is responsible for assessing and evaluating long-term care needs, establishing level of care (medical eligibility) and providing information regarding available options for receiving long-term care services for all individuals applying for the Medicaid Institutional Care Program and Medicaid waivers.

Client: An individual being assessed or served in a DOEA program.

Client Information and Registration Tracking System (CIRTS): The data system developed to assist CARES staff and the aging network staff in the management of clients. The system is designed to track clients over time, in addition to providing statewide and unit-specific statistical reports.

Client Management Solution (Solution): A system that allows the State to organize, define, and standardize its client management business processes and that complies with Chapter 430, F.S.

Commercial Off the Shelf (COTS): Software or hardware that is commercially made and available for sale, lease, or license to the general public and that requires little or no unique modifications to meet the needs of the procuring party.

Commercially Reasonable Efforts: Taking such steps and performing in such a manner as a well-managed business would undertake where it was acting in a determined, prudent and reasonable manner to achieve a particular result for its own benefit.

Confidential Information: Information in the possession or under the control of the State or the Contractor that is exempt from public disclosure pursuant to Chapter 119, F.S., or to any other applicable provision of State or federal law that serves to exempt information from public disclosure.

Configurations: Adaptations made to COTS software and custom software, generally through setting table- and data-driven parameters rather than through programming code.

Configured Software: ERP or third-party application software that has been (1) configured to meet State requirements in accordance with a design approved by the State and (2) system tested by the Contractor, with all discovered defects corrected.

Contract: The written, signed agreement resulting from, and inclusion of, this ITN, any subsequent amendments thereto and the proposer's proposal.

Contract Amendment: Any written alteration in the specifications, delivery point, rate of delivery, Contract period, price, quantity, or other Contract provisions of any existing Contract, whether accomplished by unilateral action in accordance with a Contract provision, or by mutual action of the parties to the Contract; it shall include bilateral actions, such as administrative changes, notices of termination, and notices of the exercise of a Contract option.

Contract Manager: The person who shall be responsible for enforcing performance of the contract terms and conditions and serve as a liaison with the contractor as required by Section 287.057(15), F.S.

Contractor: A firm that the state contracts with to provide services defined in the ITN.

Contract Title File: A file containing limited information on the Contract.

Contract: The Technology System Contract by and between the Department and the Contractor for the performance of the Project, consisting of the General Terms and Conditions and the corresponding attachments thereto, including this Attachment H.

Contractor Authorized Representative: An individual designated by the Contractor as an individual having the authority to officially represent the Contractor in its dealings with the Department and other Eligible Entities with respect to this Contract.

Contractor Staff: Any and all personnel furnished or engaged by or on behalf of the Contractor to perform any part of the Services, including employees and independent contractors of the Contractor and its Subcontractors.

Contractor Tools: Any materials, systems, software, equipment, business processes, or business methods that are owned or licensed by the Contractor (or a Subcontractor) and form part of their service delivery infrastructure or which are otherwise used by the Contractor or a Subcontractor to perform Services under the Contract (e.g., a ticketing system or software testing suite).

Contractor: The business entity to which this Contract has been awarded and entered into by the Department.

Control (and its derivative forms, including Controlling and Controlled by): Possessing, directly or indirectly, the power to direct or cause the direction of the management policies or operations of an entity or person, whether by contract, or other objective criteria.

Cost Reply: Cost forms, schedules and other materials prepared by the Respondent in accordance with the ITN instructions submitted in a separately sealed package.

Cure Period: The period of time associated with a Deliverable, during which the Contractor is correcting deficiencies of a Deliverable identified by the Department.

Custom IP: Intellectual Property originally developed or customized specially for the Department or other Eligible Entity pursuant to this Contract, including custom and customized training materials and reports.

DCF: Department of Children and Families: The primary state agency responsible for protection of vulnerable populations such as children, the elderly, and the mentally ill, from abuse, neglect and exploitation. DCF is also responsible for financial eligibility determinations for Medicaid applicants.

DDI: Design, Development and Implementation.

Deliverable: Any document deliverable, software deliverable, or service that the contractor is required to provide the state under the Contract.

Deliverable License: A non-exclusive, perpetual, irrevocable, fully paid-up, world-wide, transferable and sub-licensable (through multiple levels of sub-licensees) right and license to Use (or have Used on the Department's or other Eligible Entity's behalf) a Deliverable as part of the Solution, in any form or media (whether now known or later developed), any Contractor- or third-party-owned Intellectual Property that is embedded or incorporated in a Deliverable and is not subject to a software license agreement executed by the Department or other Eligible Entity.

Deliverable Supplement License: a non-exclusive, world-wide, fully paid-up, transferable and sub-licensable (through multiple levels of sub-licensees) right and license to Use (or have Used on the Department's or other Eligible Entity's behalf) a Deliverable Supplement in any form or media (whether now known or later developed) in furtherance of the permitted use and enjoyment of any Deliverable.

Deliverable Supplement: any Work Product or Supplier Tool the use of which by or on behalf of the Department or other Eligible Entity (or their authorized users) is either necessary for or enhances their permitted use and enjoyment of a Deliverable.

Deliverable: Any tangible outcome which may be specified in this Contract, Statement of Work, strategy, or plan document. Deliverables are classified as documents, services, technology implementations, events, or qualified and quantified benefits. All results, items and/or materials representing goods and Services, provided, prepared and delivered or to be delivered to the Department in the course of performance under this Contract of the Services by the Contractor. Deliverables are sub-categorized as either Solution Deliverables (which are akin to major Project milestones) or Project Deliverables.

Department Contract Manager: The Department's Project Team member responsible for management of the Contract. The Department's Contract Manager will verify completeness and quality of activities and tools, and provide validation that the resulting work products support the business objectives and goals of the Department. Further, the Department's Contract Manager is to provide oversight to the Project Management processes as well as quality assurance of the deliverables and work products produced at various stages of the Project.

Department of Elder Affairs (Department or DOEA): The Department serves as the primary state agency responsible for administering human services programs for the elderly and for developing policy recommendations for long-term care. The Department may be referred to as "Buyer" or "Customer" in a PUR Form attachment. Website: <http://elderaffairs.state.fl.us/>

Design Specification: A detailed description that defines how all requirements identified in the ITN and augmented during requirements confirmation will be met.

Disaster Recovery Plan: A plan to ensure continued business processing through adequate alternative facilities, equipment, back-up files, documentation, and procedures if the primary processing site is lost to the contractor.

Documentation: All user manuals, operating manuals, technical manuals and any other instructions, specifications, documents and materials, in any form or media, that describe the functionality, installation, testing, operation, use, maintenance, support and technical and other components, features, and requirements of the Solution.

Effective Date: The last date this Contract is signed by both parties.

EMS: Enrollment Management System.

End-User: A person within an agency (not in a functional or technical support role within DOEA) with assigned access to the client management solution.

Executive Steering Committee (ESC): The eCIRTS Project governance body that has the overall responsibility for ensuring that the Project to replace CIRTS meets its primary business objectives. The Executive Sponsor serves as the Chair of the ESC.

External User: Person that has authority to use an application or system.

F.A.C.: Florida Administrative Code.

Final Acceptance: The point in the lifecycle at which the System Implementation is complete for all phases of the system and the department agrees that the production system has performed for a predefined period (Software Production Verification) per all Acceptance Criteria and System Requirements in the production environment.

Firm Fixed Price (FFP): The cost of services to be paid according to the Contract (quarterly, per deliverable, etc.), with upgrades and pre-defined support services included at no extra charge, Contract price includes all prices for services, software, and Labor Rates.

Fiscal Year (FY): July 1st of one year to June 30th of the next calendar year.

Florida Accountability Contract Tracking System (FACTS): A statewide web-based contract reporting application, as provided by Section 215.985, F.S., that allows users the ability to search for contracts by agency, vendor or service type.

FLORIDA System: DCF uses the Florida Online Recipient Integrated Data Access system to determine eligibility for Medicaid, Food Assistance Programs, and Cash Assistance programs. For DCF regulated eligibility categories such as Medicaid Waiver or Institutional Care Program (ICP), FLORIDA is the "source" for eligibility determinations. Nightly, for each work day, the FLORIDA system transmits an eligibility file containing transactions for any file additions, updates or closures

regarding eligibility processed by DCF staff throughout the day to Medicaid's system, FMMIS. This can include eligibility changes or demographic changes on open individuals in FLORIDA.

Florida Medicaid Management Information System (FMMIS): The information system currently managed by the Agency for Health Care Administration (AHCA) utilized to enroll providers, reimburse providers, and maintain eligibility and provider enrollment data.

Follow-up: A contact either on-site, electronically, in writing, or by telephone, with an individual assessed by the ADRC, CARES, his/her representative, or Lead Agency case manager, in order to determine the individual's current functional status, living arrangement, and type and frequency of services received. Follow-up is conducted also by the Lead Agency case manager or case aide within 14 business days of ordering services to determine client satisfaction with services and quality of services. Contacts, made on behalf of the client are documented in the case narrative as follow up activity. Follow-up is further defined in the context of the referral service provided by the Information and Referral (I&R) specialist.

Force Majeure Events: Unforeseeable circumstances outside the control of, and that occur other than due to the negligence or fault of, the Contractor, its Subcontractors, and their respective suppliers, that prevent or disrupt the Contractor from fulfilling the Contract. See section 24 of PUR 1000.

F.S.: Florida Statutes.

Full Time Equivalent (FTE): An individual employed on a full time (40 hours per week) basis.

HIPAA: Health Insurance Portability and Accountability Act.

Hospital-Based Skilled Nursing Facility: A distinct part of an acute care hospital that provides skilled nursing care and related services for patients who require medical or nursing care or rehabilitation for injured, disabled or sick patients. Medicaid funding is available for 30 days, with one 15-day extension if pre-approved by CARES for hospital-based nursing facility recuperative care beds. The hospital must be enrolled as a Medicaid provider for these services, and the individual must be certified by CARES as meeting a skilled level of care (LOC).

ICP: Institutional Care Program.

ID: Intellectual Disability.

Identified Risks: The project team considers information on identified risks when producing estimates of activity durations, since risks can have a significant influence on duration. The project team considers the extent to which the effect of risks is included in the baseline duration estimate for each activity.

Implementation Service(s): The requested services for the Software and System Integrator (SSI) to deploy the eCIRTS Client Management Solution.

Initial Assessment: The first time an individual is assessed by CARES or the ADRC.

Information Systems Design Methodology (ISDM): A formally documented methodology outlining specifically defined stages/phases in the systems development lifecycle associated with all systems development efforts.

Information Warehouse: A data repository allowing users to access and report on eCIRTS Information.

Intake: The method in which CARES processes referrals, including the sources from which cases are received and the requirements for accepting cases. Intake is also conducted by the ADRC through the administration of the standard screening form to gather information about an applicant for services. Intake is also conducted by AAA contracted OAA providers.

Integration Testing: The test phase that will test the overall integration of a Prepared Software Deliverable with previously delivered software Deliverables with which it interfaces. Integration Testing focuses on integration of all software Deliverable components, including but not limited to printing, reports, batch system, online system, remote system access, tapes, security and external interfaces.

Intellectual Property Rights: All or any of the following: (a) patents, patent disclosures and inventions (whether patentable or not); (b) trademarks, service marks, trade dress, trade names, logos, corporate names and domain names, together with all of the goodwill associated therewith; (c) copyrights and copyrightable works (including computer programs), mask works and rights in data and databases; (d) trade secrets, know: how and other confidential information; and (e) all other intellectual property rights, in each case whether registered or unregistered and including all applications for, and renewals or extensions of, such rights, and all similar or equivalent rights or forms of protection provided by applicable law in any jurisdiction throughout the world.

Intellectual Property: Any tangible or intangible material or thing in which Intellectual Property Rights subsist.

Interface Testing: Test that verifies the integration of the components. Progressively larger groups should be tested until the software works as a system. These test results should be available to the department if requested.

Interim Revised Reply (IRR): Any information that the Respondent provides during negotiations that becomes part of the Respondent's Reply.

Internal User: Person that has authority to use an application or system

Invitation to Negotiate (ITN): A solicitation used by an Agency which is intended to determine the best method for achieving a specific goal or solving a particular problem and identifies one or more responsive vendors with which the Agency may negotiate in order to receive the best value.

Invoice: Contractor's itemized document stating prices and quantities of goods and/or services delivered and sent to the buyer for verification and payment.

ITN: Invitation to Negotiate.

ITN Evaluation Scoring Tool: The tool whereby Respondents to the eCIRTS ITN will respond to the requirements (general, technical, and functional) that are part of the eCIRTS ITN and will be used to review, validate, evaluate, and score each Respondent's Reply to the requirements.

IV&V: Independent Verification and Validation.

JAD/JRM: Joint application design or joint requirements management sessions. These sessions are where the as-is and to-be processes flows, as well as requirements for the future state will be defined.

Key Staff: Contractor Staff whose continuity in their assigned roles and participation in the Project that are key to its success - e.g., Executive Sponsor(s), Project Manager(s), Functional Leads by functional area, Technical Leads by technical area, and Organizational Change Management Leads.

Lead Agency: An agency designated at least once every 6 years by an area agency on aging as the result of a competitive procurement conducted through a request for proposal, responsible for coordinating some or all of the services, either directly or through subcontracts, for functionally impaired elderly persons. These services must include case management, homemaker and chore services, respite care, adult day care, personal care services, home-delivered meals, counseling, information and referral, and emergency home repair services.

License: An agreement governing the use or redistribution of software.

LOC: Level of Care: The type of care required by an applicant or recipient based on his/her medical needs. The criteria for Intermediate LOC is described in Chapter 59G-4.180, Florida Administrative Code, or <https://www.flrules.org/gateway/ruleno.asp?id=59G4.180&Section=0>. The criteria for Skilled LOC is described in 59G-4.290, Florida Administrative Code, or <https://www.flrules.org/gateway/ruleno.asp?id=59G4.290&Section=0>.

LTC: Long-Term Care.

Malware: Program code or programming instructions intentionally designed to disrupt, disable, harm, interfere with or otherwise adversely affect computer programs, data files or operations; or other code typically described as malicious code or a virus, or by similar terms, including Trojan horse, worm, and backdoor.

Mandatory Minimum Qualifications: Requirements that the Department has established with respect to Replies to be submitted by Respondents.

Mandatory Requirements: Requirements that the Respondent must meet to be eligible for contract award.

Materially Deficient: Significant deficiency or combination of deficiencies in the deliverable that does not meet minimal acceptable standards as defined in the Deliverable Expectation Document (DED).

MCFR: Medical Case File Review: Also, known as a Desk Review – The examination of medical records by the CARES Assessor, Registered Nurse Specialist, and/or physician consultant in the process of determining LOC when face-to-face client contact is not required.

MedServ 3008 Form: An AHCA Medical Certification for Medicaid Long-Term Care Services and Patient Transfer Form (AHCA 5000-3008).

Milestone: The measuring point used to review and approve progress, to authorize continuation of work, and, depending on the terms of the Contract, to pay for work completed.

Mobile Device: A computing platform that not meant to be stationary. Examples include but are not limited to laptops, tablets, iPhones, iPads, and Android devices.

Module: A packaged, functional business process or set of processes implemented through software, data, and interoperable interfaces that are enabled through design principles in which functions of a complex system are partitioned into discrete, scalable, reusable components. Any proposed IT functionality can reside in any physical location and is a functional grouping of capabilities that can be implemented, tested, and certified as a single group of capabilities based on the final guidance from CMS.

MPS: Master Project Schedule.

NF: Nursing Facility: Nursing and rehabilitative facilities that are certified under Medicare/Medicaid to provide nursing services as defined in Rule 59G-4.180 or 59G- 4.290, Florida Administrative Code.

NLOC: No Level of Care: The term used by CARES when an individual does not meet LOC criteria as defined in Rule 59G-4.180 or 59G-4.290, Florida Administrative Code.

Non-Appropriation: A legislative act in which funds to enable the Department or to effect continued payment under this Contract are not appropriated or otherwise made available.

Non-Routine Business Functions: Certain business functions of the Solution are operated in production at a frequency that will not allow such functions to be executed during the applicable Warranty period, such as statutory and regulatory reports and certain quarterly or annual tasks.

OCM: Organizational Change Management.

On-Site Assessment: A comprehensive face-to-face evaluation by CARES staff, or Lead Agency case manager of an individual's medical, functional, mental, social, financial, and environmental status for the purpose of determining the individual's need for long-term care services.

Operating Environment: Collectively, the IT infrastructure owned or operated by or for the Department or other Eligible Entity that is used to host and/or operate the Solution or State

systems or databases that exchange data with the Solution or otherwise interface with it, including all associated hardware, equipment, software, platforms, communications networks and connectivity, facilities, and other components.

Organizational Change Management (OCM): Organizational Change Management. The CIRT'S Project track responsible for leading, delivering, and supporting the execution of organizational change management and workforce transition strategies, tools, programs, curriculum, training, and plans. This is one of four Project tracks.

OSV: On-Site Visit: A visit to the location where a client is currently residing (home, hospital, nursing facility, etc.) to obtain client assessment or follow-up information. To be considered an on-site visit the client must be interviewed or seen at time of assessment or follow-up.

Owner: The individual who is the final authority and decision maker in determining how data and resources are used in DOEA business and what level of access will be granted to them.

PAC: Project AIDS Care.

PACE: Program of All-Inclusive Care for the Elderly.

Party or Parties: One or both parties to the Contract, unless the context requires otherwise.

PASRR: Preadmission Screening and Resident Review.

Performance Measure: The ongoing monitoring and reporting of program accomplishments, particularly progress towards pre-established goals. Performance measures may address the type or level of program activities conducted (process), the direct products and services delivered by a program (outputs), and/or the results of those products and services (outcomes).

Performance Standards: Specific measurement indicators assigned to Contract tasks representing timeliness and quality of task output.

Performance Testing: Tests a completely integrated system to verify it meets requirements. This test should validate that the system is working as expected, that it doesn't destroy or partially corrupt its operating environment, and that it doesn't cause other processes to become inoperable. The goal of the capacity testing is to identify the right amount of resources required to meet the service demands now and in the future. These results shall be communicated to the department.

Personally Identifiable Information (PII): Any information that, either individually or when combined with other information, could be used to distinguish or trace an individual's identity, such as their name, address, telephone number, social security number, date and place of birth, mother's maiden name, account information, and/or biometric records, including information regarding an individual's education, financial transactions, medical history, criminal history and employment history, including all information given protected status under any privacy law.

PMBOK®: A Guide to the Project Management Body of Knowledge; A library of project management skills, tools and standards used by the Project Management Institute to measure and certify Project Management Professionals.

PMI: Project Management Institute.

PMO: Project Management Office.

PMP: Project Management Plan.

PoA: Power of Attorney.

POA: Program Operations Administrator: Supervises, coordinates, and monitors the activities of the CAS(s) (if applicable), Senior Assessors, Assessors, RNSs, and administrative support staff.

Policies and Procedures: The manual to provide guidance for internal regulations and procedures for department employees.

Pre-Design, Development, and Implementation (Pre-DDI): The Project phase focusing on project planning, business process standardization, and procurement of a Software and System Integrator.

Private Pay Applicants: Applicants for nursing facility admission who expect to use private funds or assets, rather than Medicaid, to pay for nursing facility care.

Process Areas: A grouping of functions that represent the State's current financial processes.

Procurement to Payment (P2P): The Process Area focusing on purchasing and paying for goods and services.

Project: The eCIRTS Project.

Project Deliverable: Key project documents and software deliveries, and documentation of supporting activities.

Project Development to Closeout (PJT): The Process Area focusing on establishing, managing, and reporting on projects.

Project License: A non-exclusive, world-wide, fully paid-up, transferable and sub-licensable (through multiple levels of sub-licensees) right and license to Use (or have Used on the Department's or other Eligible Entity's behalf) the licensed subject matter during the Contract's term for the purpose of receiving and using the Services and otherwise participating in the Project.

Project Management Body of Knowledge® (PMBOK): Guidelines for managing individual projects and defines project management related concepts. It also describes the project management life cycle and its related processes, as well as the project life cycle.

Project Management Institute (PMI): A body that certifies Project Management Professionals.

Project Management Office (PMO) Track: The eCIRTS Project Track responsible for developing and executing project management strategies for all Project phases.

Project Management Plan (PMP): A formal, approved document used to manage Project execution. The PMP documents the actions necessary to define, prepare, integrate and coordinate the various planning activities. The PMP defines how the project is executed, monitored and controlled, and closed.

Project Team: The group of Florida Department of Elder Affairs employees and Contractors dedicated to the eCIRTS Project.

PSA: Planning and Service Area.

Public Records Law: Chapter 119, F.S., Section 24(a) of Article I of the Florida Constitution, or other applicable state or federal law.

Public Records: All documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency.

Purchasing Director: DOEA Procurement lead resource.

Quality Assurance (QA): The standards, procedures, and planned systematic activities (e.g., training, project tools, and project support staff) necessary to ensure quality standards and procedures are adhered to and products or services meet Contract and quality requirements.

Quality Assurance Testing: Testing performed by the Contractor that confirms that the Prepared Software Deliverable conforms in all respects to the Design Specification and that the Deliverable has been created in a workmanlike and professional manner. Quality Assurance Testing includes without limitation system testing, integration testing, volume/stress testing, business function testing, and regression testing.

Reassessment: The process used to assess an individual who has previously been assessed utilizing an assessment instrument. Under certain circumstances, if approved by the CARES supervisor, a medical case file review reassessment may be done. Reassessment may be completed also by Lead Agency case manager.

Referral: The verbal or written submission of demographic, medical, nursing, or psychosocial information that initiates the CARES process. For the ADRC, a referral is one-to-one interaction by the I&R specialist to help assess an inquirer's need(s) and links the individual to the resource(s) capable of meeting the need.

Regression Testing: The continual re-testing of previously tested Prepared Software Deliverables to ensure that such Prepared Software Deliverables continue to operate correctly. Regression Testing is necessary to test components that may be affected by a change to another component.

Reply Opening: A date and time on which Responses will be opened at the location indicated on the Timeline. Respondents may, but are not required to, attend. The Buyer may choose not to announce prices or release other materials pursuant to section 119.071(1)(b), F. S. Any person requiring a special accommodation because of a disability should contact the Procurement Officer at least five (5) workdays prior to the solicitation opening. If you are hearing or speech impaired, please contact the Buyer by using the Florida Relay Service at (800) 9558771 (TDD).

Reply: The materials submitted as a response to the eCIRTS ITN solicitation. A Reply may be referred to as a Response in a PUR Form attachment. See also the definitions for Technical Reply, Cost/Price Reply, and ITN Evaluation Scoring tool.

Requirements Traceability Matrix (RTM): A tool that correlates requirements to system functionality throughout the project life cycle (i.e., design, testing, and implementation).

Rescreening: The process used to screen an individual who has previously been screen utilizing an assessment instrument.

Resource Capabilities: The duration of most activities will be influenced by the capabilities of the human and material resources assigned to them.

Resource Requirements: A description of the types of resources needed and in what quantities for each element at the lowest level of the WBS. Resource requirements for higher-levels within the WBS can be calculated based on the lower-level values. If additional resources are added, projects can experience communication overload, which reduces productivity and causes production to improve proportionally less than the increase in resource.

Respondent: The entity that submits materials to the Department in accordance with the ITN.

Review Period or Review Cycle: A period of time associated with a Deliverable and specified during which the Department is examining the Deliverable and determining if it is acceptable.

RNS: Registered Nurse Specialist: Coordinates and conducts comprehensive assessments of applicants for nursing facility placement and home and community-based services as well as evaluates the LOC and recommends the most appropriate placement. provides information regarding available options for receiving long-term care services.

RPS: Regional Program Supervisor: Managerial staff responsible for providing technical support and supervision to the CARES PSA offices within an assigned region.

Schedule IV-B: Schedule IV-B is a manually prepared schedule submitted annually to support Florida Legislative Budget Requests (LBR) for Information Technology Projects in the State of Florida.

SDLC: System Development Life Cycle.

Scope: Describes at a high level what will and will not be included as part of the Project. Scope defines the Project's overall boundaries and provides a common understanding of the Project for the stakeholders and the Project Team. It is further defined by the Solution Requirements, Deliverables, schedule, and supporting information contained in the Statement of Work.

Service Level Agreement (SLA): A formal, negotiated section of the Contract that defines (or attempts to define) in quantitative (and perhaps qualitative) terms the contracted-for standards of performance to be achieved in providing the Services.

Service Provider: An entity that is awarded a sub-grant or contract from an AAA to provide direct services under the following programs: Older Americans Act, Alzheimer's Disease Initiative, Community Care for the Elderly, Home Care for the Elderly, or Local Services Program.

Services: All of the services, functions, equipment, software and other products and materials (including Deliverables) to be performed or provided by the Contractor and any of its Subcontractors under this Contract, as such services are described in the Contract, and as such services evolve, are enhanced and change over the Contract Term, as described in Attachment G – SSI Contract, and including any services or functions not specifically described in this Contract that are reasonably required for the proper performance and provision of the services. The term services also include any unspecified service that is inherent to the proper delivery of a specified service.

Shared Data: Any data or information of or concerning the State or the Department that either is created or generated by a Contractor in the performance of the Contractor's obligations under the Contract, including third party service and product Contracts in accordance with payment card industry rules.

SI: Systems Integrator.

Significant Change: The change in an individual's health status after an accident or illness, an actual or anticipated change in the individual's living situation, a change in the caregiver relationship, loss of or damage to the individual's home or deterioration of his or her home environment, or loss of the individual's spouse or caregiver. F.S. 409.962(17).

SLA: Service Level Agreement.

SME: Subject Matter Expert: A person who has knowledge in a particular area or topic.

SMI: Serious Mental Illness.

SMMC LTC: Statewide Medicaid Managed Care Long-Term Care Program.

Software and System Integrator (SSI): The Contractor selected through the procurement process to implement the State's new Client Management Solution.

Software Vendor: The manufacturer and provider of COTS or Framework software proposed for use by the State as part of the Solution. The Software Vendor is the entity that manufactures or licenses to applicable software and provides maintenance and support services for it.

Software-as-a-Service (SaaS): A name for a subscription-based hosted service that makes the functions and features of software applications available to authorized users via internet access for a particular period of time in exchange for an agreed upon fee paid for each period of use.

Solution (Client Management Solution): Collectively, the new integrated system, including all of its components and elements, that is the principal object of the procurement and Project – which system is intended to replace the Client Information and Registration Tracking System (CIRTS).

Solution Deliverable: Documentation of any major or significant Project milestone or event that is designated as a Solution Deliverable in the Contract. Solution Deliverables are used to signify important critical path or other major accomplishments of the Project.

Solution Requirements: The State's business, functional, technical, and/or performance requirements and specifications for the Solution, whether documented by State personnel or representatives without the assistance of Contractor Personnel or documented by Contract Personnel working alone or jointly with State personnel or representatives.

SOW: Statement of Work.

Specialized Services: Services that are not covered in the NF per diem and are required for appropriate placement in the NF setting for individuals with ID or SMI whose needs are such that continuous supervision, treatment and training by qualified mental health or ID personnel is necessary.

SSN: Social Security Number.

Staffing Process: An interdisciplinary team meeting of CARES professional staff, Program Operations Administrator, CARES Physician Consultant, and/or Registered Nurse Specialist to review medical documentation and assessment information for CARES clients. The purpose of staffing is to determine appropriate and correct LOC, Program Recommendation, and Placement Recommendation.

Stakeholder: Anyone affected in any way by the project being conducted, or the outcome of the project.

Standard Business Process Model: The document that describes each Process Area in detail and that includes the Standard Business Process Workflows.

Standard Business Process Workflow: A standardized flow diagram (such as a Visio).

State: State of Florida.

State Data: Any data or information of or concerning the Department or any other State Agency or instrumentality or any of their respective Staff or constituents that is provided to or obtained by the Contractor, a Subcontractor, any Contractor Staff, or by any of their suppliers in connection with the negotiation and execution of the Contract or performance of the Services and the Contractor's other obligations under the Contract, including any such data and information that either (i) is created, generated, collected or processed by Contractor Personnel in connection with the performance of the Contractor's obligations under the Contract, including data processing input and output, Service Level measurements, asset information, reports, third party service and product agreements, and the Contractor's charges to the Department under the Contract, or (ii) resides in or is accessed through the State's Operating Environment or the Contractor's Service Delivery Environment; as well as any data and information based on or derived from any of the foregoing.

State Material: Any material that is owned or licensed by the State, including any material that contains State Data, State Confidential Information, and/or the State's Intellectual Property.

Status: The state of a department record [license/permit/education] at a time to be defined by business rules.

Statement of Work (SOW): Detailed description of services and/or products to be provided as part of a resulting Contract; an attachment to the Contract. Also, any subsequent Contract Changes affecting the scope of work as may be negotiated and agreed to by the State.

Strategy: A method of achieving a particular goal, usually over a long period of time. For the eCIRTS Project, a strategy may include detailed plans for achieving success and the most efficient use of resources.

Subcontractor Agreement: A negotiated and legally binding arrangement(s) between an individual or business contracting with the Contractor to perform part of the Services.

Subcontractor: A company to which the Contractor delegates performance of a portion of the Services, but does not include independent (1099) contractors engaged by the Contractor solely in a staff augmentation role.

Swing Bed: A program that provides Medicaid funding for rural hospital beds that can "swing" to nursing facility beds when a patient needs nursing care rather than acute care services. CARES must certify the individual as being eligible for skilled or intermediate nursing care services under Medicaid.

System and Data Strategy (SDS) Track: The eCIRTS Project track responsible for developing and executing technical strategies for the new client management system. This is one of four Project tracks.

System Documentation: Documents that contain the technical description of the configuration, components, and operation of the CIRTS.

System Implementation: The period in the project management lifecycle where the system is moved from a test environment to the live production environment and the system starts to be used for real business transaction

System Requirement: A defined business function that is a required component of the new system, specified in the ITN and Appendix 6 Functional and Technical Requirements, as well as any detailed requirements established during the Business Process Reengineering and System Design phase of this project.

System Testing: Test that verify the functionality of a specific section of code, at the function level. As documented above this is the Contractors responsibility and shall ensure that the building blocks of the software work independently from each other and should increase quality of overall development. All of the testing of a software Deliverable to be conducted by the Contractor prior to turning over the Deliverable to the Department for Acceptance.

Task Assumptions: A set of expectations about project tasks.

Task Constraints: Factors that limit or constrict how, when, or if a task is performed.

TBD: To be determined.

TBSCIP: Traumatic Brain and Spinal Cord Injury Program.

Technical Reply: Materials prepared by the Respondent in accordance with the ITN instructions that do not include the cost forms, cost schedules, and other cost-related materials.

Temporary Placement: An individual in need of a temporary stay in a nursing facility or rehabilitation center who has potential for returning to the community. A client in a temporary placement who returns to the community is considered in an alternative placement at the time of return to the community.

Track: Work streams that are staffed to simultaneously support the Project.

Transaction: Any activity carried out, performed, managed or conducted by a user of the system.

Unauthorized Removal: The Contractor's removal of any Key Staff from their assigned roles or the Project without the prior written consent of the Department.

Unit Testing: Using test conditions provided in the detailed specification to test the logic of a Prepared Software Deliverable component. During Unit Testing, additional test conditions may be defined to help ensure that all logic paths are tested, and test data is created to test the software as needed.

Use: Use, execute, display, copy, perform, interface, integrate, test, distribute copies of, maintain, modify, enhance, and create derivative works of the subject materials.

User: Anyone who employs the services provided by the system. The user can be an individual visitor to the DOEA website, an applicant or licensee, a licensing department staff member, or recipient of content from the system. See also Authorized User.

User Acceptance Testing (UAT): Testing performed by department/state and acts as a final verification of the required business functionality and proper functioning of the system. It emulates real world usage conditions.

Vendor Bid System (VBS): The State internet-based vendor information system at http://myflorida.com/apps/vbs/vbs_main_menu.

Work Breakdown Structure (WBS): A graphical representation of the hierarchy of project deliverables and their associated tasks. As opposed to a project Schedule that is calendar-based, a WBS is deliverable-based and written in business terms.

Workflow: Sequence of tasks. A workflow describes the order of a set of tasks performed to complete a given procedure within an organization.

Work Product: Any material or other work of authorship produced by Contractor Staff in the course of performing the Services that is not specifically produced as a Deliverable. A Work Product may or may not be a Deliverable Supplement.