Medicaid Enterprise System Program

Integration Services and Integration Platform (ISIP) – previously Systems Integrator and Enterprise Services Bus

Vendor Forum

May 9, 2018
Information contained in the following presentation, in its entirety, is subject to change. It is the sole responsibility of interested parties to monitor the Florida Vendor Bid System.

Please note that the Agency is not answering substantive questions (e.g. scope) today. Please continue to monitor the Vendor Bid System for information to be released at a later date.
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The Agency for Health Care Administration is transforming the Medicaid Enterprise System to provide better health care for all Floridians

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Chief, Medicaid Fiscal Agent Operations
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MEDICAID ENTERPRISE SYSTEM (MES)
The MES is the interdependent systems within the Agency and other state or Federal agencies that do the following:

- manage the provision of essential services to Medicaid recipients
- collect data key to the management and operation of Florida’s Medicaid program
The Agency’s transformation is informed by its MES Strategic Plan, which guides decisions through a Vision, Guiding Principles, and Strategic Priorities.

**MES VISION**
Transform the Medicaid Enterprise to provide the greatest quality, the best experience, and the highest value in healthcare.

**MES GUIDING PRINCIPLES**
- Enable high-quality and accessible data
- Improve healthcare outcomes
- Reduce complexity
- Use evidenced-based decision making
- Improve integration with partners
- Improve provider and recipient experience
- Enable good stewardship of Medicaid funds
- Enable holistic decision making rather than short-term focus

**INITIAL MES STRATEGIC PRIORITIES**
- Integration Components
- Provider Experience
- Recipient Experience

**VISION 2023**
Achieving World-Class Health Outcomes in Florida

**SISTER AGENCIES**
- Interoperable data exchange enabling outcomes-based decision making
- Shared governance to drive better outcomes for all of our recipients

**DIFFERENTIATORS:**
- Proactive operations
- Analytics-enabled decision making
- Outcomes-focused health management

**PEOPLE**
Empowered and engaged employees

**PROVIDERS**
- Seamless enrollment and licensure process to maintain a strong provider network
- Data-enabled performance management

**PROCESS**
Automated & standardized operations

**TECHNOLOGY**
Fully integrated, flexible, and modern systems

**HEALTH PLANS**
- Proactively manage value-based care delivery through health plans
- Interoperable encounter data between the Agency and health plans
To facilitate this transformation, the Agency is transitioning its MES to a modular environment.

### Transforming to Modularity

<table>
<thead>
<tr>
<th>AS-IS</th>
<th>TO-BE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single system, single vendor (FMMIS¹)</td>
<td>Smaller components, multiple vendors</td>
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</table>

#### Desired Outcomes from Modularity

- Smaller system components to:
  - Upgrade components with fewer enterprise-wide disruptions
  - Avoid vendor lock-in

- Greater vendor choice to:
  - Source best-in-class solutions to meet specific requirements
  - Benefit from market innovation
  - Receive higher levels of service

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¹: “FMMIS” stands for Florida Medicaid Management Information Services
The Agency is using the lessons learned across agencies and states to create a set of solutions to guide its transformation to modularity.

<table>
<thead>
<tr>
<th>STATE</th>
<th>KEY LESSONS LEARNED &amp; AGENCY SOLUTIONS</th>
</tr>
</thead>
</table>
| Wyoming | Involve business users early in the transition to be outcomes-focused  
  ➢ Enable outcomes through a programmatic focus to enterprise transformation |
| Nebraska | Multiple modular procurements strain Agency resources  
  ➢ Minimize strain on the Agency by establishing an orderly governance and portfolio management process |
| Florida | Significant collaboration is vital to successful transition  
  ➢ Enable collaboration through a clear technical strategy |
The Agency’s programmatic focus enables delivery focused on business outcomes across the enterprise.

- Enable outcomes through a programmatic focus to enterprise transformation

Maps the business and measures performance

Creates processes for business improvements through technology implementation

Ensures compliance with CMS’s standards
The Agency created MES Portfolio Management and Governance processes to speed decision making and to maintain alignment to the MES Strategic Plan.

波特folio Management

识别项目

目录项目

确定ROI

建议给治理

弃用

实施

等待

治理

设定战略方向

对齐并优先处理AHCA与项目

监督和指导MES项目开发

管理和建议日常决策

运行日常项目
The Agency’s MES Technology Strategy presents a clear set of standards to align stakeholders.

The MES Technology Strategy defines business, data, and technology standards and direction to implement the MES Strategic Priorities and Guiding Principles.

- Business Process Consolidation
- Modular Business Processing
- Improve Provider Experience
- Improved Recipient Experience
- Business Persona Optimized Data Analysis Marts and Tools

- Event Based Data Quality
- Decouple Systems / Proprietary Data
- Use of Data Services / DaaS
- Standardized Data Edit and Validation
- Real Time Identity Matching / MDM
- 360 View of Information

- Service Reuse & Service Management
- User Interface Consistency
- Dynamic Cloud-enabled Infrastructure
- Policy Based Security/Access Control
- Very large scale processing support

- MITA SSA Updates and Tracking
- MES Project Management Standards
- MES Project Management Toolkit
- MES Certification Management Plan

- MES Data Standards
- Information Architecture Documentation

- MES Technology Standards
- MES Design and Implementation Standards
- MES Security Standards
- MES Technology Architecture Documentation

- Service Reuse & Service Management
- User Interface Consistency
- Dynamic Cloud-enabled Infrastructure
- Policy Based Security/Access Control
- Very large scale processing support

- Business Drives Technology

- Data Improves Decisions

- Technology Enables the Business

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Enable collaboration through a clear technical strategy
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The Agency is near ready to procure the components to transition to the future state

CURRENT STATE

FMMIS

<table>
<thead>
<tr>
<th>Function 1</th>
<th>Function 2</th>
<th>Function 3</th>
<th>Function 4</th>
<th>Function 5</th>
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</thead>
<tbody>
<tr>
<td>PBM</td>
<td>DSS</td>
<td>EB</td>
<td>TPL</td>
<td></td>
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</table>

FUTURE STATE

MES Integration Platform

Module 1
Module 2
Module 3
Module 4
Module 5

EB  TPL  PBM  EDW

PBM: Pharmacy Benefits Manager
DSS: Decision Support System
EB: Enrollment Broker
TPL: Third Party Liability
EDW: Enterprise Data Warehouse

Existing System
Transitioned System
New System
Though the MES spans the Agency’s Bureaus (and other agencies), Florida Medicaid is directly supported by the Agency Division of Medicaid’s Florida Medicaid Management Information System (FMMIS).
As per the Agency’s 2016 Medicaid Enterprise System Procurement Strategy, the Agency procured the services of the Strategic Enterprise Advisory Services (SEAS) and Independent Verification and Validation (IV&V) Vendor.
The Agency will procure the ISIP Vendor to enable moving towards a modular operation. During this time, the Agency and the SEAS Vendor will develop requirements for integrations. The Agency plans beginning the procurement process for these services in early State Fiscal Year 2018/2019.
Transformation Phases 2 & 3: Integration

FMMIS and priority legacy systems are integrated through ISIP. During this time, the Agency and the SEAS Vendor will develop requirements for modular implementations.
Transformation Phases 2 & 3: EDW Build and Integration

Concurrent with the integration of legacy components, the EDW will be established and integrated through the integration platform. The DSS will be retired. The Agency plans on beginning the procurement process for the EDW in Fall 2018.
Transformation Phase 4: Modular Build and Integration

Modules will be procured and integrated into the MES through the ISIP. The prioritization and selection of modules will be driven by portfolio management and the Strategic Plan. These activities may run concurrent with the establishment of the EDW. The Agency estimates the procurement process to begin between Spring 2018 and Winter 2020.
Transformation Phase 4: Modular Build and Integration

In this last transformational phase, the system has reached full modularity. The Agency’s efforts will transition from transforming the system to making incremental improvements to individual modules and business processes.
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# Integration Services and Integration Platform (ISIP) Defined

## Integration Services

Professional services focused on establishing and maintaining interoperability through the use of the MES integration platform that enables secure real-time, or close to real-time, data exchange and integration of data and services across system boundaries.

## Integration Platform

Commercial Off the Shelf (COTS) system software and customized application architecture to perform connectivity, security, communication, and processing to translate protocols, platforms, and data formats allowing data sharing and reuse of processing services. The integration platform performs integration functions centrally that would be difficult or impossible to implement within distributed systems.
## Conceptual Role of the ISIP Vendor

<table>
<thead>
<tr>
<th>1. Enable Interoperability between</th>
<th>2. Improve data quality and consistency</th>
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<tbody>
<tr>
<td>New MES Modules</td>
<td>Enable real-time, or close to real-time, data access to reduce duplication across the MES</td>
</tr>
<tr>
<td>MES Business, Technology, and Data Services</td>
<td>Standardized data validation, transformation, and validation</td>
</tr>
<tr>
<td>Existing Agency Application Systems</td>
<td>Publish data updates to interested parties in real-time, or close to real-time</td>
</tr>
<tr>
<td>Other Systems in and outside the Medicaid Enterprise</td>
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<table>
<thead>
<tr>
<th>3. Provide a 360-degree view of information</th>
<th>4. Minimize data integration and sharing complexity for consumers</th>
</tr>
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<tbody>
<tr>
<td>Identify, link, and aggregate information for people and organizations with the same identities</td>
<td>Simplify security and access control processing</td>
</tr>
<tr>
<td>Provide a user interface to dynamically present real-time, or near real-time information from multiple sources</td>
<td>Automate audit, versioning, cost usage, configurability, testing</td>
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<tr>
<td></td>
<td>Standardize messaging patterns</td>
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</table>
The ISIP solution components enable MES Program integration

<table>
<thead>
<tr>
<th>ISIP Components</th>
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<tbody>
<tr>
<td>• Enterprise Service Bus</td>
</tr>
<tr>
<td>• API Gateway</td>
</tr>
<tr>
<td>• Publish Subscribe Alerting</td>
</tr>
<tr>
<td>• Service Registry / Repository</td>
</tr>
<tr>
<td>• Identity Resolution</td>
</tr>
<tr>
<td>• Master Person Index</td>
</tr>
<tr>
<td>• Master Organization Index</td>
</tr>
<tr>
<td>• Master Data Management</td>
</tr>
<tr>
<td>• Master Information User Interface</td>
</tr>
<tr>
<td>• Single Sign-on / Authentication</td>
</tr>
<tr>
<td>• Enterprise Rules Engine</td>
</tr>
<tr>
<td>• Managed File Transfer</td>
</tr>
</tbody>
</table>

- Systems, Data Exchange, Service Reuse, and Interoperability
- Identities of People and Organizations for a 360 View of Information
- Data Management Rules and Security Policy
The ISIP Vendor will enable end-to-end processing and interoperability of the MES

<table>
<thead>
<tr>
<th>Keep All Modules Working Together</th>
<th>Enable Security and Privacy</th>
<th>Manage Mechanics of Connectivity</th>
<th>Manage Risk of Interoperability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Interoperability</td>
<td>Question design for Interoperability</td>
<td>Resolve Integration Disagreements</td>
<td>Report Integration Status</td>
</tr>
</tbody>
</table>
The Agency intends to award a multi-year contract with renewals

<table>
<thead>
<tr>
<th><strong>Scope of Services</strong></th>
<th><strong>Payment Structure</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Integration Platform</strong></td>
<td></td>
</tr>
<tr>
<td>• Initial Implementation Services</td>
<td>Fixed price phased deliverables</td>
</tr>
<tr>
<td>• Hardware, Software, and Hosting</td>
<td>Pass Through to Agency</td>
</tr>
<tr>
<td>• Ongoing Operations and Maintenance Services</td>
<td>Fixed price monthly operations cost</td>
</tr>
<tr>
<td><strong>Integration Services</strong></td>
<td></td>
</tr>
<tr>
<td>• Integration with FMMIS, other MES systems, and new modules as directed by the Agency</td>
<td>Fixed Price Task Order for Defined Scope of Integration Services based on standard hourly rates by resource category</td>
</tr>
</tbody>
</table>

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1: These renewals will be consistent with F. S. 287.057 (13) which states Contracts for commodities or contractual services may be renewed.
Award of specific MES contracts precludes vendors from other MES contracts under two (2) circumstances

1. Any SEAS, IV&V, ISIP, or EDW contract vendors are precluded from performing work on any other MES contract.

2. Depending on the module, certain modular vendors will be precluded from performing work on certain other functions. Further detail on these preclusions will be communicated at a later date.
The Agency seeks a vendor that aligns with the desired ISIP solution characteristics

- Provides Best Value for Florida
- Align with the overall MES Strategy and MES Technology Strategy
- Delivers Processing Accuracy (e.g. Identity Matching, MDM, ESB)
- Supports High Speed Processing at Very Large Scale Volumes
- Enables Efficient Module and External System Integration and Processing
- Simplifies Configuration, Policy, Process, Maintenance, and Testing
- Supports Services Versioning, Reuse, and Rapid Deployment
- Protects and Secures MES Data and Assets
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Roles and Responsibilities

**SEAS VENDOR**
Strategic, Technology, & Programmatic Advisory

- **WHY**
  - Strategic – Define and maintain the MES strategy, governance, and portfolio
  - Programmatic – Develop CMS, State, and Business Area planning, funding and certification deliverables, and report MITA maturity improvement
  - Technology – Define technology strategy and standards, vendor communication, and support standards compliance
  - SEAS Organization – Manage MES Program project planning, scheduling, and delivery

- **WHAT**
  - The SEAS Vendor acts as strategic, technical, and programmatic advisors and facilitates the program’s implementation.

**ISIP VENDOR**
Integration Services & Integration Platform

- **WHY**
  - The ISIP Vendor uses technical expertise to enable and confirm interoperability of MES modules.

- **WHAT**
  - Develop and operate an enterprise integration platform to support information exchange and service reuse
  - Provide integration and interoperability services between MES systems
  - Validate overall security and privacy of integrated modules
  - Facilitate technical resolutions to Module Vendor disagreements
  - Reports project status

**MODULE VENDOR**
Best-in-Class Modular MMIS Solution

- **WHY**
  - The MES module vendor provides systems for specific functions and interfaces with the MES.

- **WHAT**
  - Comply with Program IT, Data, Security, and Project Management standards
  - Design, configure, implement, test, deploy, maintain, and support modules
  - Implement processing capabilities including interfaces, data conversion, and use of enterprise business, technology, and data services to improve outcomes
  - Coordinate with the ISIP Vendor to integrate and test MES functionality
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Closing remarks

Procurement Expectations

- Respondents to the Agency’s solicitations or persons acting on their behalf may not contact any employee or officer of the executive or legislative branch concerning any aspect of the solicitation.

- This preclusion is in place between the release of the solicitation and the end of the 72-hour period following the Agency posting a Notice of Intended Award.

- Exceptions to this preclusion are for communications made in writing to the procurement officer or as provided in the solicitation documents.

- Violation of this provision may be grounds for rejecting a response. See §287.057(23), Florida Statutes.