



RON DESANTIS
GOVERNOR

MARY C. MAYHEW
SECRETARY

October 7, 2019

Prospective Vendor(s):

Subject: Solicitation Number: AHCA ITN 001-19/20

Title: Florida Health Care Connections (FX)
Enterprise Data Warehouse (EDW)

Addendum No. 5

The enclosed information has been provided for consideration in the preparation of your response to the above mentioned solicitation.

All other terms and conditions of the solicitation remain in effect.

To the extent this Addendum gives rise to a protest, failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.

Sincerely,

Crystal Demott

Crystal Demott, Procurement Director
Bureau of Support Services

Enclosures:

Addendum No. 5 (4 Pages)

Exhibit A-4, Submission Requirements and Evaluation Criteria Components (Technical Response) (October 7, 2019) (37 Pages)

Exhibit A-5-a, Detailed Budget (October 7, 2019) (23 Pages)

Attachment B, Scope of Services (October 7, 2019) (145 Pages)

Attachment B, Exhibit B-2, Staffing Positions (35 Pages)

AHCA ITN 001-19/20 Questions and Answers (86 Pages)



**AHCA ITN 001-19/20
ADDENDUM NO. 5**

Item #1

Attachment A, Instructions and Special Conditions, **Section A.1.**, Instructions, **Sub-Section A.**, Overview, **Item 6.**, Solicitation Timeline, is hereby deleted in its entirety and replaced as follows:

TABLE 1		
SOLICITATION TIMELINE		
ACTIVITY	DATE/TIME	LOCATION
Solicitation Issued by Agency	July 29, 2019	Electronically Posted http://myflorida.com/apps/vbs/vbs_www.main_menu
Deadline for Receipt of Written Questions	August 12, 2019 2:00 p.m.	solicitation.questions@ahca.myflorida.com
Anticipated Date for Agency Responses to Written Questions	October 2, 2019 October 7, 2019	Electronically Posted http://myflorida.com/apps/vbs/vbs_www.main_menu
Deadline for Receipt of Responses	October 25, 2019 November 4, 2019 2:00 p.m.	Crystal Demott Agency for Health Care Administration Mailroom Building 2, 1 st Floor, Suite 1500 2727 Mahan Drive Tallahassee, FL 32308-5403
Public Opening of Responses	October 25, 2019 November 4, 2019 3:00 p.m.	2727 Mahan Drive, Building 2 Operations Conference Room, 2nd Floor, Room 200 Tallahassee, FL 32308-5403
Anticipated Dates for Negotiations	December 16, 2019 through January 24, 2020 January 6, 2020 through February 12, 2020	2727 Mahan Drive, Building 2 Operations Conference Room, 2nd Floor, Room 200 Tallahassee, FL 32308-5403
Anticipated Posting of Notice of Intent to Award	February 10, 2020 March 2, 2020	Electronically Posted http://myflorida.com/apps/vbs/vbs_www.main_menu

AHCA ITN 001-19/20 ADDENDUM NO. 5

Item #2

Attachment A, Instructions and Special Conditions, Section A.1., Overview, Sub-Section B., Response Preparation and Content, Item 2., Mandatory Response Content, Sub-Item c., Original Proposal Guarantee, Sub-Item 1), the first sentence is hereby deleted and replaced with:

- 1) The respondent's Original Response must be accompanied by an Original Proposal Guarantee payable to the State of Florida in the amount of **\$4,500,000.00**.

Item #3

Attachment A, Instructions and Special Conditions, **Exhibit A-4**, Submission Requirements and Evaluation Criteria Components (Technical Response), is hereby deleted in its entirety and replaced with **Attachment A**, Instructions and Special Conditions, **Exhibit A-4**, Submission Requirements and Evaluation Criteria Components (Technical Response) (October 7, 2019).

Item #4

Attachment A, Instructions and Special Conditions, **Exhibit A-5-a**, Detailed Budget, is hereby deleted in its entirety and replaced with **Attachment A**, Instructions and Special Conditions, **Exhibit A-5-a**, Detailed Budget (October 7, 2019).

Item #5

Attachment B, Scope of Services, is hereby deleted in its entirety and replaced with **Attachment B**, Scope of Services (October 7, 2019).

The below information outlines items addressed in the replaced **Attachment B, Scope of Services (October 7, 2019)**:

- **Attachment B**, Scope of Services, Section B.1., General Overview, Sub-Section B., Purpose, Item 4., High Level Scope. Sub-Item c., Content Management, Sub-Item 1)., removes "provide scanning equipment".
- **Attachment B**, Scope of Services, Section B.1., General Overview, Sub-Section B., Purpose, Item 5., Anticipated Implementation Approach, reworks sub-section to include additional content for Operational Data Management, Analytic Data Management and Data Management Organizational Transformation.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section A., Introduction to Requirements, last paragraph, removes the last sentence, "The Deliverable Crosswalk is located in the EDW procurement Library and communicates where the deliverables are referenced within the solicitation".
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section B., Business Outcome Requirements, Item 3., MITA Maturity Outcomes, updates the first sentence to define SS-A as the State Self-Assessment (SS-A) document.
- **Table: 1 – Component Specific Business Requirements**, updates BR-010 and BR-011 to replace the term "artifact" with "document".
- **Table: 3 – Business Unit Specific Requirements**, removes BR-033.

AHCA ITN 001-19/20 ADDENDUM NO. 5

- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section E., Technology Solution Requirements, Item 1., FX Enterprise Requirements, renames the Enterprise Data Security Plan to Data Security Plan.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section E., Technology Solution Requirements, Item 1., FX Enterprise Requirements, Sub-Item e., Security Requirements, renames the Enterprise Data Security Plan to Data Security Plan.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section E., Technology Solution Requirements, Item 3., Project Life Cycle Tool Requirements, Sub-Items a., Project Management Tool Requirements, and b., System Delivery Management Tool Requirements, updates to define the specific document in the EDW Procurement Library.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Services Requirements, Item 1., Contract Wide Requirements, Sub-Item a., Reporting Requirements, Sub-Item 1) b), updates calendar day to business day.
- **Table: 28 – Training Requirements**, updates SR-072.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Services Requirements, Item 5., Certification Life Cycle, updates to rename the specific document in the EDW Procurement Library.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Services Requirements, Item 5., Certification Life Cycle, Sub-Item b., MECT Module Checklist Requirements, updates the first paragraph.
- **Table: 34 – MECT Access and Delivery Requirements**, SR-255 updates.
- **Table: 37 – MECT Intermediary and Interfaces Requirements**, SR-311 updates.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Services Requirements, Item 8., Deliverable Requirements, Sub-Item a., Deliverable Management, Sub-Item 1), removes “and Section B.3.F.7.c.” requirement.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Services Requirements, Item 8., Deliverable Requirements, Sub-Item c., Payment Deliverable Requirements – Contract Wide, Sub-Item 4)b), removes Federated Identity Management Solution Reports.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Services Requirements, Item 8., Deliverable Requirements, Sub-Item e., Deliverable Crosswalk, has been removed.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Services Requirements, Item 12., Data Management Requirements, Sub-Item b., List of Data Types Managed, updates to define the specific document in the EDW Procurement Library.
- **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section I., Contract Requirements, added a new Item, Order of Precedence.

Item #6

Attachment B, Scope of Services, is hereby amended to now include **Exhibit B-2**, Staffing Positions.

AHCA ITN 001-19/20 ADDENDUM NO. 5

Item #7

Documents within the EDW Procurement Library that have either been updated or added since the original ITN posting are identified with an asterisk (*) in the listing below. Vendors should review all documents within the EDW Procurement Library.

Florida FX Procurement Strategy v.5 FINAL *
Florida-FX-Program-Current-to-Future-State_2018-05-24 *
FX-Volumetric-Information_Sep_2019 *
MECT-2_3-Appendix-A_MECL-and-At-a-Glance-Sheets *
MECT-2_3-Appendix-B_Required-Artifacts-List *
MECT-2_3-Medicaid-Enterprise-Certification-Life-Cycle *
MITA-Con-Ops-100 *
MMIS-Con-Ops-100 *
SEAS-FX-Data-Types_Nov2018 *
SEAS-NH-Data-Management-Strategy-100 *
SEAS-NH-Data-Security-Plan-100 *
SEAS-NH-Design-and-Implementation-Mgmt-Standards-100 *
SEAS-NH-EDW-ISIP-Combined-Certification-Checklist_2019-04-12 *
SEAS-NH-EDW-ReferenceGuide-201 *
SEAS-NH-P-1-Revised-MITA-SS-A-and-Update-Process-100 *
SEAS-NH-P-2-Project-Management-Standards-200 (1) *
SEAS-NH-P-3-PM-Toolkit-200 *
SEAS-NH-P-4-Certification-Plan-200
SEAS-NH-PMP-Template-300 (002) *
SEAS-NH-Project Lifecycle Tools *
SEAS-NH-S-1-FX-Governance-Plan-200
SEAS-NH-Strategic-Plan-100
SEAS-NH-Strategic-Portfolio-Plan-100
SEAS-NH-T-3-Data-Standards-200 *
SEAS-NH-Technical-Architecture-Deliverable-100
SEAS-NH-Technical-Management-Strategy-100
SEAS-NH-Technology-Standards-Deliverable-100
SEAS-NH-Technology-Standards-Reference-Guide_2019-08-28 *
SEAS-NH-WKP-OCM-Tools-100 *
SEAS-NH-WKP-Style-Guide-101 *
SMMC-Style-Guide_2018-10-04
Interfaces FMMIS and DSS *

EXHIBIT A-4 SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

Instructions to Respondents for the completion of Exhibit A-4:

The Agency is seeking information to determine the ability of respondents to provide design, development and implementation (DDI), as well as subsequent, ongoing operations and maintenance services.

All respondents to this solicitation shall utilize **Exhibit A-4**, Submission Requirements and Evaluation Criteria Components (Technical Response), for submission of its response and shall adhere to the instructions below for each Submission Requirement Component (SRC).

Respondents **shall not** include website links, embedded links and/or cross references between SRCs.

Each SRC contains form fields. Population of the form fields with text will allow the form field to expand and cross pages. There is no character limit. Form fields do not permit text formatting.

Attachments are acceptable for any SRC, except where limitations are noted in the SRC. The attachment must be referenced in the form field for the respective SRC and located behind each respective SRC response. Respondents shall name and label attachments to refer to respective SRCs by SRC identifier number.

Agency evaluators will be instructed to evaluate the responses based on the narrative contained in the SRC form fields and the associated attachment(s), if applicable.

Each response will be independently evaluated and awarded points based on the criteria and points scale using the Standard Evaluation Criteria Scale below unless otherwise identified in each SRC contained within **Exhibit A-4**.

STANDARD EVALUATION CRITERIA SCALE	
Point Score	Evaluation
0	The component was not addressed.
1	The component contained significant deficiencies.
2	The component is below average.
3	The component is average.
4	The component is above average.
5	The component is excellent.

The SRCs in **Exhibit A-4** may not be retyped and/or modified and must be submitted in the original format.

Failure to submit, **Exhibit A-4**, may result in the rejection of response.

Exhibit A-4 is available for respondents to download at:
<http://ahca.myflorida.com/procurements/index.shtml>.

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

Respondent Name:

SRC# 1: Table of Contents

The Respondent shall include a Table of Contents in its response. The Table of Contents shall contain section headings and subheadings along with corresponding page numbers. This shall be provided as an attachment.

Score: No points will be awarded for the Table of Contents.

SRC# 2: Executive Summary

The Respondent shall include an executive summary which demonstrates the Respondent's overall understanding of the Scope of Services and describes the prominent features of the Respondent's Technical Proposal.

Score: No points will be awarded for the Executive Summary.

Response:

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 3: Organizational and Structure History

The Respondent shall demonstrate its capability to provide the services described in this solicitation by describing its organizational structure and experience. For responses including a subcontractor, the same descriptions of organizational structure and history shall be provided, including the organization structure connecting the Respondent and the subcontractor. At a minimum, the description shall include:

1. A detailed description of the Respondent's organizational structure, ownership, affiliations, and location(s);
2. A copy of the Respondent's corporate organizational chart and a depiction of where the EDW Project falls within the organizational structure; and
3. Background information of the corporation, its size, and resources which shall include the following:
 - a. Name of Respondent and any subcontractor(s);
 - b. Date established;
 - c. Ownership (public company, partnership, subsidiary, etc.);
 - d. Corporation's Federal Employer's Identification Number (FEIN) and Florida Corporate Charter Number;
 - e. Corporation's primary line of business; and
 - f. Total number of employees.

Attachments are limited to the following:

- Organizational chart of company and subsidiaries; and
- List of physical locations of company and subsidiaries.

Score: No points will be awarded for the Organizational and Structure History.

Response:

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 4: Respondent Qualifications

The Respondent shall demonstrate its capability to provide the services described in **Attachment B**, Scope of Services, by describing its relevant experience with large healthcare systems, qualifications and length of experience in providing services similar in nature to those below and how these experiences will be applied to move the Agency forward based on its current Strategic Plan. Details of corporate experience (including subcontractors' capabilities) shall describe all contracts related to the Scope of Services in this solicitation within the last five (5) years and shall cover:

1. Relevant experience with designing, developing, implementing, hosting, and maintaining information technology solutions including Operational Data Stores (ODS), Reporting Data Stores (RDS), Analytical Data Management, and Content Data Management;
2. Relevant experience with developing and implementing technology services for large healthcare systems including project and program management, business requirements elicitation and development, system testing and system implementation;
3. Capability to work in parallel on multiple projects, with multiple vendors, and maintain timelines while effectively working as a single, distributed team to meet Agency and Federal requirements; and
4. Ability to describe how qualifications and experience prepares the Vendor to move the Agency forward based on the goals, objectives and guiding principles as described within the Agency's Strategic Plan.

Response:

SRC# 4 Evaluation Criteria:

1. The adequacy of the Respondent's capability and approach to meet the requirements described in this solicitation, based on the relative experience in the performance of current or previous contracts for which it is/was the lead Vendor on any projects which are similar in size, scope, and complexity in the past five (5) years, as the services outlined in this solicitation.
2. The adequacy of the Respondent's experience with Operational Data Stores (ODS), Reporting Data Stores (RDS), Analytical Data Management, and Content Data Management information technology solutions and services.
3. The adequacy of the Respondent's experience with programmatic services for developing and implementing technology services including project and program management, business requirements elicitation and development, system testing and system implementation; especially technology services experience related to large healthcare systems. The adequacy of the Respondent's experience and capability to work in parallel

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

on multiple projects and delivery timelines to effectively work as a single, distributed team to meet Agency and Federal requirements.

4. The adequacy of the Respondent's qualification and experience to move the Agency forward based on the goals, objectives and guiding principles as described within the Agency's Strategic Plan and to limit the potential for vendor lock-in and conflict of interest for future Agency acquisitions.

Score: This Section is worth a maximum of 20 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 5: Sanctions

The Respondent shall list and describe any sanctions levied against the Respondent, the Respondent's affiliates, its subsidiaries, its parent company, the affiliates and subsidiaries of its parent company, its affiliate's subsidiaries and subcontractors (handling sub-contracts related to consultant services when the sub-contracts are for **\$250,000.00** or more annually), within the five (5) years preceding the date of its Response to this solicitation, that have been imposed by:

1. The Agency;
2. CHIP;
3. A Medicaid program in another state;
4. Medicare;
5. Any Federal government regulatory body, regardless if the sanction was related to Medicaid; or
6. Any regulatory body in any state, regardless if the sanction was related to Medicaid.

Information requested in [Exhibit A-4, SRC #5 Template](#) for each sanction shall be provided by the Respondent for administrative and non-administrative sanctions. An administrative sanction means the issue pertains to timeliness or the use of an incorrect format, i.e., report, deliverable, or another required item submitted late or submitted in the wrong format. A non-administrative sanction means the issue pertains to performance in accordance with the contract scope of services, i.e., incomplete or inaccurate deliverable or services.

Response:

Respondents shall use **Exhibit A-4, SRC #5 Template**, located at <http://ahca.myflorida.com/Procurements/index.shtml> to provide its response.

SRC# 5 Evaluation Criteria:

1. The extent to which sanctions were due to issues with performance in accordance with contract Scope of Services, versus administrative issues.
2. The extent to which sanctions were significant (e.g. high dollar amounts above **\$10,000.00** or lengthy - longer than ninety (90) calendar days to resolve) or numerous (e.g. multiple contracts with similar sanctions).

Score: This Section is worth a maximum of 10 raw points with each of the above components being worth a maximum of 5 points each.

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

For Item 1:

1. 5 points if no sanctions;
2. 4 points if sanctions related only to administrative issues;
3. 3 points if non-administrative sanctions were all minor (less than **\$10,000.00**) and there were fewer than four (4) incidents;
4. 2 points if non-administrative sanctions were all minor but four (4) or more incidents;
5. 1 point if any major (**\$10,000.00** or above) administrative sanction; or
6. 0 points if any major non-administrative sanction.

For Item 2:

1. 5 points if no sanctions;
2. 4 points if sanctions were minor and there were fewer than four (4) incidents;
3. 3 points if sanctions were all minor (less than **\$10,000.00**) but four (4) or more incidents;
4. 2 points if up to two (2) are more than **\$10,000.00** or lengthy (longer than ninety (90) calendar days) to resolve or more than two (2) contracts with multiple sanctions;
5. 1 point if more than two (2) but fewer than five (5) high-dollar amounts or lengthy (longer than ninety (90) calendar days) and/or more than two (2) but fewer than five (5) contracts with multiple sanctions; or
6. 0 points if performance falls below above limits.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 6: Security Rating Score

In accordance with **Attachment A**, Instructions and Special Conditions, Section A.2., Special Terms and Conditions, Sub-Section A., Information Technology, Item 4, the Agency shall conduct an initial IT security risk score scan on the Respondent through an information security rating service, at the Agency's expense, to enable the Agency to effectively measure and mitigate the successful respondent's security risks. The Respondent will work with the Agency's Security Rating Score Provider to define the relevant Respondent assets providing Agency services.

Response:

SRC# 6 Evaluation Criteria:

The adequacy of the Respondent's security rating score by determining whether the Respondent has received:

1. A score in the top 90-100% of submitters;
2. A score in the top 80-89% of submitters;
3. A score in the top 70-79% of submitters;
4. A score in the top 60-69% of submitters;
5. A score in the top 50-59% of submitters; or
6. A score in the lower 0-49% of submitters.

Score: This Section is worth a maximum of 5 raw points as outlined below:

1. 5 points for a score in the top 90-100% of submitters;
2. 4 points for a score in the top 80-89% of submitters;
3. 3 points for a score in the top 70-79% of submitters;
4. 2 points for a score in the top 60-69% of submitters;
5. 1 point for a score in the top 50-59% of submitters; or
6. 0 points for a score in the lower 0-49% of submitters.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 7: Business Solution Requirements

The Respondent shall demonstrate its proposed approach to the Business Solution requirements, addressing all requirements in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Sections B., Business Outcome Requirements, C., Business Requirements, and D., User Requirements. At a minimum, the description shall include the following:

1. Approach to achieving the required business outcomes in order to:
 - a. Improve delivery of healthcare services or cost;
 - b. Eliminate costs of collecting duplicate data;
 - c. Reduce complexity;
 - d. Alleviate manual processes;
 - e. Facilitate a holistic, evidence-based decision-making process;
 - f. Reduce error payments using prepayment analysis; and
 - g. Eliminate cost of duplicate analysis performed by different stakeholders.
2. Approach to fulfilling the Agency's legislative mandates, business objectives and strategic objectives for:
 - a. Component Specific Business Requirements including data management, business intelligence, and analytic capabilities;
 - b. Reporting Requirements including reporting and analytic tools; and
 - c. Business Unit Specific Requirements including optimized data stores.
3. Approach to providing solutions that meets the functional and non-functional requirements related to specific users or user categories for:
 - a. Data management, business intelligence and analytic capabilities that support the data sharing needs of Agency Stakeholders; and
 - b. Reporting and analytic capabilities based on user specific persona.

Response:

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 7 Evaluation Criteria:

The adequacy and viability of the proposed capability, approach and solution to provide the following:

1. Improve delivery of healthcare services or cost;
2. Eliminate costs of collecting duplicate data;
3. Reduce complexity;
4. Alleviate manual processes;
5. Facilitate a holistic, evidence-based decision-making process;
6. Reduce error payments using prepayment analysis;
7. Eliminate cost of duplicate analysis performed by different stakeholders;
8. Fulfill the Agency's legislative mandates, business objectives and strategic objectives for:
 - a. Component Specific Business Requirements including data management, business intelligence, and analytic capabilities;
 - b. Reporting Requirements including reporting and analytic tools; and
 - c. Business Unit Specific Requirements including optimized data stores.
9. Data management, business intelligence, and analytic capabilities that support the data sharing needs of Agency Stakeholders; and
10. Reporting and analytic capabilities based on user specific persona.

Score: This Section is worth a maximum of 60 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 8: Solution Wide Requirements

The Respondent shall demonstrate its proposed approach and capability to meet the requirements in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section E., Technology Solution Requirements, Item 1., FX Enterprise Requirements. At a minimum, the description shall include the approach to achieving the required Solution Wide requirements in order to:

1. Adhere to FX technology and compliance standards including the current and future Agency technology standards;
2. Provide hosting services to meet the Agency requirements and support optimal performance of the Solution; and
3. Adhere to FX Security Standards and the Enterprise Data Security Plan.

Response:

SRC# 8 Evaluation Criteria:

The adequacy and viability of the proposed capability and approach to provide the following:

1. FX technology and compliance standards including the current and future Agency technology standards;
2. Hosting services to meet the Agency requirements and support optimal performance of the Solution; and
3. FX Security Standards and the Enterprise Data Security Plan.

Score: This Section is worth a maximum of 15 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 9: Disaster Recovery and Business Continuity

The Respondent shall demonstrate its capability and approach to meet the requirements described in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section E., Technology Solution Requirements, Item 1., FX Enterprise Requirements, Sub-Item c., Disaster Recovery and Business Continuity, and Sub-Section F., Services Requirements, Item 8., Deliverable Requirements, Sub-Item c.13) PD-13: Contingency Plan (for Disaster Recovery and Business Continuity). At a minimum, the Response shall demonstrate the adequacy of the Respondent's Disaster Recovery / Business Continuity proposed approach and capability to:

1. Maintain and annually test a Contingency Plan (for Disaster Recovery and Business Continuity) for the EDW in accordance with the FX Technical Management Strategy;
2. Support the Agency's Enterprise Contingency Plan, located in the [EDW Procurement Library](#);
3. Provide back-up procedures, hot sites, redundancy, and support to prevent and accommodate the disruption of systems and communications;
4. Minimize downtime and disruption of services;
5. Provide timely failover; and
6. Create policies and procedures to implement a recovery as well business continuation services.

Response:

SRC# 9 Evaluation Criteria:

1. The adequacy of the Respondent's proposed capability and approach to maintain and annually test a Contingency Plan (for Disaster Recovery and Business Continuity) for the EDW in accordance with FX Technical Management Strategy.
2. The adequacy of the Respondent's proposed capability and approach to provide back-up procedures, hot sites, redundancy and support to prevent and accommodate the disruption of systems and communications.
3. The adequacy of the Respondent's proposed capability and approach to provide timely failover and create policies and procedures to implement a recovery as well business continuation services.

Score: This Section is worth a maximum of 15 raw points with each of the above components being worth a maximum of 5 points each.

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 10: Performance Standards

The Respondent shall demonstrate its understanding and ability to provide an automated method or system/operations tools to provide the monthly reports of the quality measurements and performance monitoring dashboards as defined in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section E., Technology Solution Requirements, Item 1., FX Enterprise Requirements, Sub-Item d., Performance Standards, and Sub-Section I., Contract Requirements. At a minimum, the Response shall include the following:

1. The ability to provide performance measure system and resulting generated reports to the Contract Manager; and
2. The ability to provide performance monitoring dashboards for performance standards.

Response:

SRC# 10 Evaluation Criteria:

1. The adequacy of the Respondent's ability to provide performance measure system and resulting generated reports to the Contract Manager.
2. The adequacy of the Respondent's ability to provide performance monitoring dashboards for performance standards.

Score: This Section is worth a maximum of 10 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 11: Solution Component ODS Requirements

The Respondent shall demonstrate its proposed approach and capability to meet the requirements in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section E., Technology Solution Requirements, Item 2., Technology Solution Component Specific Requirements, Sub-Item a., Operational Data Store (ODS). At a minimum, the description shall include the approach to providing Component ODS Solution requirements in order to:

1. Design, develop, and implement an ODS Solution that shall function as the Single Source of Policy Truth;
2. Support and promote an enterprise view, utilizing technologies which align with Centers for Medicare and Medicaid (CMS) Standards and Conditions, Agency goals, Medicaid Information Technology Architecture (MITA) Maturity Strategy, and nationally recognized business processes and technologies;
3. Provide a Data Conversion and Migration solution which provides the capability of resolving semantic and context conflicts across numerous data sources in a consistent and reliable manner to preserve both the accuracy and integrity of the data;
4. Provide Data Replication and data replication tools to sync data in real-time between databases, and supports: loading and extracting; cloud-based replication; bi-directional replication, transactional integrity; auto capture of metadata; and load balancing; and
5. Design, develop, and implement data services to decouple data from modules and applications and maintain separation of concerns.

Response:

SRC# 11 Evaluation Criteria:

The adequacy and viability of the proposed capability, approach and solution to provide the following:

1. ODS Solution that shall function as the Single Source of Policy Truth;
2. Enterprise view, utilizing technologies which align with CMS Standards and Conditions, Agency goals, MITA Maturity Strategy, and nationally recognized business processes and technologies;
3. Data Conversion and Migration solution which provides the capability of resolving semantic and context conflicts across numerous data sources in a consistent and reliable manner to preserve both the accuracy and integrity of the data;

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

4. Data Replication and Data Replication tools to sync data in real-time between databases, and supports: loading and extracting; cloud-based replication; bi-directional replication, transactional integrity; auto capture of metadata; and load balancing; and
5. Data services to decouple data from modules and applications and maintain separation of concerns.

Score: This Section is worth a maximum of 25 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 12: Solution Component Data Store Requirements

The Respondent shall demonstrate its proposed approach and capability to meet the requirements in **Attachment B, Scope of Services**, Section B.3., Services Provided by the EDW Vendor, Sub-Section E., Technology Solution Requirements, Item 2., Technology Solution Component Specific Requirements, Sub-Items f., Enterprise Analytic Data Store, g., Persona Optimized Analytics & Reporting (POAR), and h., Specialized Data Stores (SDS). At a minimum, the description shall include the approach to providing Component Data Store solution requirements in order to:

1. Design, develop, and implement an Enterprise Analytic Data Store Solution to function as the central data repository for decision making, business intelligence, data analytics, operational reporting, dashboards, and fraud and abuse detection;
2. Design, develop, and implement a Persona Optimized Analytics and Reporting (POAR) solution to function as the standard set of tools for Federal and State reporting, operational reporting, data analytics, financial reporting and analytics, dashboards, ad hoc reporting, and geospatial analysis; and
3. Design, develop, and implement a Specialized Data Store (SDS) solution to function as a repository for specialized, and ad hoc data structures intended for targeted decision making, data analytics, dashboards, audit requests, large volume data extracts, and as a source of research, survey, and analytic data.

Response:

SRC# 12 Evaluation Criteria:

The adequacy and viability of the proposed capability, approach and solution to provide the following:

1. Enterprise Analytic Data Store Solution to function as the central data repository for decision making, business intelligence, data analytics, operational reporting, dashboards, and fraud and abuse detection;
2. Persona Optimized Analytics and Reporting (POAR) solution to function as the standard set of tools for Federal and State reporting, operational reporting, data analytics, financial reporting and analytics, dashboards, ad hoc reporting, and geospatial analysis; and
3. Specialized Data Store (SDS) solution to function as a repository for specialized, and ad hoc data structures intended for targeted decision making, data analytics, dashboards, audit requests, large volume data extracts, and as a source of research, survey, and analytic data.

Score: This Section is worth a maximum of 15 raw points with each of the above components being worth a maximum of 5 points each.

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 13: Solution Component Specific Requirements

The Respondent shall demonstrate its proposed approach and capability to meet the requirements in **Attachment B, Scope of Services**, Section B.3., Services Provided by the EDW Vendor, Sub-Section E., Technology Solution Requirements, Item 2., Technology Solution Component Specific Requirements, Sub-Item i., Solution Component Specific Requirements. At a minimum, the description shall include the approach to providing Component Specific Feature solution requirements in order to:

1. Design, develop, and implement an enterprise Data Dictionary encompassing the business processes, practices and policies of the Agency and incorporating current industry standard tools and technologies;
2. Design, develop, implement, and maintain a Metadata Management Tool and Repository that contains all Agency Metadata to include business, technical, data quality, operational, security, and end-user;
3. Design and develop Extract Transfer Load (ETL) processes as well as procure, implement, operate and maintain an ETL Management Tool that supports all ETL activities; and
4. Design, develop, implement, and maintain additional solution capabilities such as machine learning, consent management, data anonymization, automated financial balancing, automated data redaction, archiving solutions, automated attestation, and audit functionality.

Response:

SRC# 13 Evaluation Criteria:

The adequacy and viability of the proposed capability, approach, and solution to provide the following:

1. Data Dictionary encompassing the business processes, practices, and policies of the Agency and incorporating current industry standard tools and technologies;
2. Metadata Management Tool and Repository that contains all Agency Metadata to include business, technical, data quality, operational, security, and end-user;
3. ETL processes as well as procure, implement, operate, and maintain an ETL Management Tool that supports all ETL activities; and
4. Additional solution capabilities such as machine learning, consent management, data anonymization, automated financial balancing, automated data redaction, archiving solutions, and audit functionality.

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

Score: This Section is worth a maximum of 20 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 14: Project Management Life Cycle Requirements

The Respondent shall describe its proposed approach to PD-1: Project Management Plan (Includes Vendor Resource Management Plan) and provide a draft PD-2: Project Schedule, as described in **Attachment B, Scope of Services**, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Service Requirements, Item 2., 8.c.(1) and 8.c.(2). The Respondent shall demonstrate sound project management methodology as documented in the FX Project Management Standards. The proposed Project Management Plan approach shall include sufficient detail to provide an understanding of how the Respondent will implement the project, guide work execution, manage communication among project stakeholders, and handle required project changes.

The proposed project plan and project schedule must show a thorough understanding of the scope of work and the capability to successfully complete each deliverable. The draft schedule shall include a high-level project timeline for successful management and completion of the project as well as identify major project phases. The schedule timeline must include time frames and durations for key milestones and deliverables.

Attachments are limited to the following:

- Draft Project Schedule

Response:

SRC# 14 Evaluation Criteria:

1. The adequacy of the Respondent's ability to implement the project, guide work execution, manage communication among project stakeholders, and handle required project changes.
2. The adequacy of the Respondent's draft Project Schedule to demonstrate a high-level project timeline for successful management and capability to successfully complete each deliverable.

Score: This Section is worth a maximum of 10 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 15: System Delivery Life Cycle Phase Requirements

The Respondent shall demonstrate its proposed approach and capability to meet the requirements in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Service Requirements, Item 3., System Delivery Life Cycle Phase Requirements. At a minimum, the description shall include the approach to providing System Delivery Life Cycle Phase solution requirements in order to:

1. Comply with all aspects of the agreed-to Project Process Agreement (PPA);
2. Design, develop, and implement an enterprise Data Model encompassing business processes, practices, and policies of the Agency and which incorporates current industry standard tools and technologies;
3. Provide testing services for developing and executing a Master Test Plan to include objectives, scope, testing strategy, testing types, entrance and exit criteria, schedule, testers, and software tools to be used for the Solution;
4. Provide implementation services for Engagement Management activities to engage the project stakeholders for the purposes of coordinating implementation activities which conform to Agency IT Change Control processes;
5. Provide ongoing Operations & Maintenance to support:
 - a. Project solution throughout the life of the contract including correcting defects, configuration updates, updating the solution to implement policy changes, best practices or initiatives, scheduled maintenance, testing, and release management;
 - b. Help desk system and services for the help desk system to record and maintain tickets;
 - c. Development and implementation of a written and customized training plan which includes webinars, web-based modules, face-to-face training, and the coordination with the Organizational Change Management team;
6. System Warranty for the project solution which meets CMS certification requirements, the contract requirements, the design and development documents, and the system documentation;
7. Provide system disposition activities of any systems decommissioned during the Contract.

Response:

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 15 Evaluation Criteria:

The adequacy and viability of the proposed capability and approach to provide the following:

1. Compliance with all aspects of the agreed-to Project Process Agreement (PPA);
2. Enterprise Data Model encompassing business processes, practices, and policies of the Agency and which incorporates current industry standard tools and technologies;
3. Testing services for developing and executing a Master Test Plan to include objectives, scope, testing strategy, testing types, entrance and exit criteria, schedule, testers and software tools to be used for the Solution;
4. Implementation services for Engagement Management activities to engage the project stakeholders for the purposes of coordinating implementation activities which conform to Agency IT Change Control processes;
5. Ongoing Operations & Maintenance to support:
 - a. Project solution throughout the life of the contract including correcting defects, configuration updates, updating the solution to implement policy changes, best practices or initiatives, scheduled maintenance, testing and release management;
 - b. Help desk system and services for the help desk system to record and maintain tickets;
 - c. Written and customized training plan which includes webinars, web-based modules and face-to-face training, and the coordination with the Organizational Change Management team; and
6. System Warranty for the project solution which meets CMS certification requirements, the contract requirements, the design and development documents, and the system documentation; and
7. System disposition activities of any systems decommissioned during the Contract.

Score: This Section is worth a maximum of 45 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 16: Security Life Cycle

The Respondent shall demonstrate its capability, approach and proposed solution for the Security Life Cycle to include activities defined in certification and accreditation, risk assessment, and system security plan phases and to address all requirements in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Service Requirements, Item 4., Security Life Cycle to:

1. Coordinate with stakeholders to develop and execute a Systems Security Plan, security controls, security assessments, and risk assessments, in compliance with all Florida and Federal enterprise information security policies, standards, security initiatives, and regulations;
2. Develop and execute a Security Controls Test Plan that includes objectives, scope, misuse cases, testing type, entrance and exit criteria, schedule, testers, software tools and test results;
3. Develop and execute a Security Test Plan for all shared infrastructure, connectivity and communications between the EDW Solution, the Integration Platform and the modules; and
4. Conduct periodic Security Control Assessments to monitor ongoing effectiveness of implemented security controls and remediate those issues as determined by the Agency.

Response:

SRC# 16 Evaluation Criteria:

The adequacy and viability of the proposed capability and approach to provide the following:

1. Systems Security Plan, security controls, security assessments, and risk assessments, in compliance with all Florida and Federal enterprise information security policies, standards, security initiatives, and regulations;
2. Security Controls Test Plan that includes objectives, scope, misuse cases, testing type, entrance and exit criteria, schedule, testers, software tools and test results;
3. Security Test Plan for all shared infrastructure, connectivity, and communications between the EDW Solution, the Integration Platform and the modules; and
4. Security Control Assessments to monitor ongoing effectiveness of implemented security controls and remediate those issues as determined by the Agency.

Score: This Section is worth a maximum of 20 raw points with each of the above components being worth a maximum of 5 points each.

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 17: Certification Life Cycle

The Respondent shall demonstrate its capability, approach and proposed solution for providing and maintaining a technical solution which supports all applicable requirements per the EDW Medicaid Management Information Systems (MMIS) Certification Checklist and in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Service Requirements, Item 5., Certification Life Cycle to:

1. Provide and maintain a technical solution which supports all applicable requirements as per the EDW MMIS Certification Checklist, and provide support as needed to the Module Vendors for module certification activities including participating in planning activities, meetings, and other activities as required by CMS;
2. Provide a solution to maximize Federal Financial Participation (FFP) where this project and its Statement of Objectives aligns with the CMS Conditions and Standards for Enhanced Funding in accordance with 42 CFR 433.112;
3. Provide and maintain a technical solution which meets all Decision Support System and Program Integrity checklist items of the Medicaid Enterprise Certification Toolkit (MECT) providing evidence and artifacts to document checklist compliance and support the review and validation of those items;
4. Provide and maintain a technical solution which meets all Access and Delivery checklist items in the MECT providing evidence and artifacts to document checklist compliance and support the review and validation of those items;
5. Provide and maintain a technical solution which meets all Information Architecture checklist items in the MECT providing evidence and artifacts to document checklist compliance and support the review and validation of those items; and
6. Provide and maintain a technical solution which meets all Integration and Utility, Intermediary and Interfaces, and Standards and Conditions checklist items in the MECT providing evidence and artifacts to document checklist compliance and support the review and validation of those items.

Response:

SRC# 17 Evaluation Criteria:

The adequacy and viability of the proposed capability and approach to provide the following:

1. Technical solution which supports all applicable requirements as per the EDW MMIS Certification Checklist, and provide support as needed to the Module Vendors for module certification activities including participating in planning activities, meetings, and other activities as required by CMS;

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

2. Ability to maximize FFP where this project and its Statement of Objectives aligns with the CMS Conditions and Standards for Enhanced Funding in accordance with 42 CFR 433.112;
3. Technical solution which meets all Decision Support System and Program Integrity checklist items of the MECT providing evidence and artifacts to document checklist compliance and support the review and validation of those items;
4. Technical solution which meets all Access and Delivery checklist items in the Medicaid Enterprise Certification Toolkit (MECT) providing evidence and artifacts to document checklist compliance and support the review and validation of those items;
5. Technical solution which meets all Information Architecture checklist items in the MECT providing evidence and artifacts to document checklist compliance and support the review and validation of those items; and
6. Technical solution which meets all Integration and Utility, Intermediary and Interfaces, and Standards and Conditions checklist items in the MECT providing evidence and artifacts to document checklist compliance and support the review and validation of those items.

Score: This Section is worth a maximum of 30 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 18: Other Project Services

The Respondent shall demonstrate its capability, approach, and proposed solution to support Other Projects Services and to address all requirements in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Service Requirements, Item 6., Other Project Services to:

1. Support the data management framework for each Data Management Area; and
2. Provide services to support the migration of application data in Agency and external systems to use data services that access the Operational Data Store.

Response:

SRC# 18 Evaluation Criteria:

The adequacy and viability of the proposed capability and approach to provide the following:

1. Data management framework for each Data Management Area; and
2. Migration of application data in Agency and external systems to use data services that access the Operational Data Store.

Score: This Section is worth a maximum of 10 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 19: Project Artifact Requirements

The Respondent shall demonstrate its capability and approach for developing expected artifacts to be produced/reused to address all requirements in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Service Requirements, Item 7., Project Artifact Requirements to:

1. Follow Agency formatting standards to create and update system documentation for the operational functions including narratives and flows, user manuals, desk level procedures, and the technical documentation necessary to describe and communicate the solution and services;
2. Provide easy, navigable access to system documentation at the functional-area level, providing comprehensive, searchable documentation in user-friendly, exportable, and printable format;
3. Provide and maintain a current, accessible, searchable, online data dictionary which clearly defines fields, field locations, tables, reports, data relationships, and formulas;
4. Maintain system design documentation to include Business Architecture, Business Process, Information Architecture, and Technical Architecture; and
5. Provide list of additional relevant project artifacts applicable for Projects performed under the Contract.

Response:

SRC# 19 Evaluation Criteria:

The adequacy and viability of the proposed capability and approach to provide the following:

1. Create and update system documentation for the operational functions including narratives and flows, user manuals, desk level procedures, and the technical documentation necessary to describe and communicate the solution and services;
2. Easy and navigable access to system documentation at the functional-area level, providing comprehensive, searchable documentation in user-friendly, exportable, and printable format;
3. Current, accessible, searchable, online data dictionary which clearly defines fields, field locations, tables, reports, data relationships, and formulas;
4. System design documentation to include Business Architecture, Business Process, Information Architecture, and Technical Architecture; and
5. List of additional relevant project artifacts applicable for Projects performed under the Contract.

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

Score: This Section is worth a maximum of 25 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 20: Deliverables and Deliverable Requirements

Note: Some deliverables are evaluated in specific SRCs as indicated below.

The Respondent shall describe its proposed approach, represented content, and deliverable format to complete the deliverables within the proposed timeline and comply with FX Deliverable Management Standards and FX Technology Standards for all deliverables for the EDW Project as described in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Service Requirements, Item 8., Deliverable Requirements and in accordance with the following:

1. PD-1: Project Management Plan - evaluated in **SRC# 14**;
2. PD-2: Project Schedule - evaluated in **SRC# 14**;
3. PD-3: High-Level Technical Design - an approach to integration related to the scope of work to include the Vendor's design of framework which shall serve as a single point of reference for integration management of modules, systems, and data;
4. PD-4: System Security Plan (SSP) – evaluated in **SRC# 16**;
5. PD-5: Requirements Document - further elaborates the requirements from the solicitation and the detailed requirements solicited during Joint Application Development (JAD) sessions with the FX stakeholders;
6. PD-6: Bill of Materials - purchase, Install, and Initial Hardware and Software Configuration according to the approved EDW Project Schedule, including a Hardware and Software Acquisition and Installation Plan;
7. PD-7: Technical Infrastructure Plan - documents the planned technical infrastructure (hardware, software, networks, data centers, facilities) to support all the components of the EDW Solution. It also includes the plan for tools and utilities that support the hardware and systems software. The plan shall include any local and remote environments including cloud services;
8. PD-8: Requirements Traceability Matrix (RTM) - developed and used in the EDW Project to confirm the project's scope, requirements, and deliverables remain as originally procured when compared to the baseline;
9. PD-9: System Design Document - written description of the solution including detailed architectural diagrams, data flows, component specifications and commercial of the shelf (COTS) products that provide guidance to the system developers;
10. PD-10: Data Conversion and Migration Plan - proposed methodology, roles and responsibilities, tools, data structures, quality controls, security and privacy considerations, testing tools, and schedule for converting data from the source system(s) to the target system(s);

EXHIBIT A-4

SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

11. PD-11: Implementation Plan/Software Release Plan - managing dependencies across releases along with handling technology stacks, databases, and infrastructure to match the roll out needs, to include stakeholder walkthroughs, method and schedule to deploy the solution, and process for submitting request for Agency's acceptance;
12. PD-12: Configuration Management and Release Management Plan - details the tracking, planning, managing, scheduling, and controlling the implementation of the solution through different stages and environments;
13. PD-13: Contingency Plan (for Disaster Recovery and Business Continuity) - evaluated in **SRC# 9**;
14. PD-14: Interface Control Document (ICD) - describes how the Vendor will incorporate the design, development, and maintenance of enterprise interfaces;
15. PD-15: Test Plan – evaluated in **SRC# 15**;
16. PD-16: Environmental Readiness Review - details the scope of work, planned tasks, and completed tasks as part of the configure/build process for the solution which includes implementation of detailed requirements, detailed design, configuration, development, unit testing, documentation, and Construction Completion Approval and Report;
17. PD-17: Implementation Readiness Review - includes a Test Completion Report for the various types of testing including, but not limited to System, Security, and Performance Testing. The results shall be traced to the use case/user story and design documentation being tested;
18. PD-18: Organizational Change Management Plan (includes Training Plan) - details the Vendor's approach to provide change management and training to the stakeholders for the solution. Deliverable includes Communications Approach and Plan, Training Plan, Training Materials, Training Schedule, User Training Completion, User Manual, and Desk Level Procedures;
19. PD-19: Operations and Maintenance Manual - details how to plan, operate and maintain the solution in compliance with Performance Standards. The manual shall include the plan and details for architecture/hosting operations, monitoring daily operations performance, performing routine maintenance, maintaining user and system documentation, approach to enhancements, reporting status against relevant Performance Standards and schedule of major and minor releases;
20. PD-20: Production Readiness Review and Stage Gate Review - which examines the actual solution characteristics and the procedures of the product's operation to ensure all hardware, software, resources, procedures, and user documentation accurately reflects the deployed state of the system;
21. PD-21: Post Implementation Report - details planning and roadmaps for managing all System releases which includes managing dependencies across releases along with handling technology stacks, databases, and infrastructure to match the roll out needs;

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

22. PD-22: Operational Readiness Review (ORR) - documents the Solution is ready for go-live, including the people, processes, and technology to confirm preparedness for operations and includes Operational Readiness Test Results and Operational Readiness Walkthrough;
23. PD-23: Warranty Completion Report - define the approach to the warranty period, warranty entrance and exit criteria, and the approach to correcting defects;
24. PD-24: Annual Operational Analysis (AOA) – developed in accordance with the FX Project Life Cycle (FXPLC) in the FX Design and Implementation Management Standards document; and
25. PD-25: Vendor Turnover Plan - evaluated in **SRC# 25**

Response:

SRC# 20 Evaluation Criteria:

The adequacy and viability of the proposed approach, represented content, and deliverable format for the following:

1. High-Level Technical Design, Requirements Document, Technical Infrastructure Plan and System Design Document (Architecture Specifications);
2. Requirement Traceability Matrix;
3. Data Conversion and Migration Plan;
4. Implementation Plan/Software Release Plan, Configuration Management and Release Management Plan, ICD;
5. Environmental Readiness Review (Includes Construction Completion Approval and Report), and Implementation Readiness Review (Includes System, Security, and Performance Test Completion and Report);
6. Organizational Change Management Plan (includes Training Plan);
7. Operations and Maintenance Manual; and
8. Production Readiness Review, Post Implementation Report, ORR, Warranty Completion Report, and AOA.

Score: This Section is worth a maximum of 40 points for the above components with each of the above components being worth a maximum of 5 points each.

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 21: Project Life Cycle Review

The Respondent shall demonstrate its capability and approach to meet FXPLC project implementation processes, services and to address all requirements in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Service Requirements, Item 9., Project Life Cycle Review Requirements to:

1. Produce plans, throughout the FXPLC, which are noted as deliverables, work products, and accompanying artifacts for each specific FX Project;
2. Produce a Project Reuse Plan to be incorporated in the CMS Reuse Plan that describes the approaches used to maximize reuse; and
3. Provide materials and participate in reviews defined in FXPLC.

Response:

SRC# 21 Evaluation Criteria:

The adequacy and viability of the proposed capability and approach to provide the following:

1. Deliverables, work products, and accompanying artifacts for each specific FX Project; and
2. Project Reuse Plan to be incorporated in the CMS Reuse Plan that describes the approaches used to maximize reuse.

Score: This Section is worth a maximum of 10 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 22: Data Management Requirements

The Respondent shall demonstrate its capability, approach, and proposed solution to meet the Agency's data management needs and to address all requirements in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section F., Service Requirements, Item 12., Data Management Requirements to:

1. Provide data management, business intelligence, and analytic capabilities to support the data sharing needs of the Agency, CMS, other identified State Agencies, and partners that support Medicaid;
2. Support the data needs (real-time and historical) for future FX modules implemented by other vendors;
3. Support the data needs for third party data analytic service providers contracted with the Agency; and
4. Provide storage and retention services in compliance with the policies defined by the Agency.

Response:

SRC# 22 Evaluation Criteria:

The adequacy and viability of the proposed capability, approach, and solution to provide the following:

1. Data management, business intelligence and analytic capabilities to support the data sharing needs of the Agency, CMS, other identified State Agencies, and partners that support Medicaid;
2. Data needs (real-time and historical) for future FX modules implemented by other vendors;
3. Data needs for third party data analytic service providers contracted with the Agency; and
4. Storage and retention services in compliance with the policies defined by the Agency.

Score: This Section is worth a maximum of 20 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 23: Additional Innovation Opportunities (not evaluated)

As described in **Attachment B**, Scope of Services, Section B.3., Services Provided by the EDW Vendor, Sub-Section G., Additional Innovation Opportunities, the respondent may include any additional technological innovations offered to the Agency which are not included in the functional requirements (a requirement that defines specific behaviors or functions) and non-functional requirements (a requirement that specifies criteria that can be used to judge the operation of a system, rather than specific behaviors). The requirements described in **Attachment B**, Scope of Services are not intended to limit innovations, cost effective solutions, or creativity in preparing a response which provides the Agency the best solution. Innovative ideas, product offerings, and new concepts other than those presented in this solicitation can be considered by the respondent. Responses to this SRC will not be scored and may, at the Agency's discretion, be included in the negotiations phase.

Additionally, to effectively react to rapidly evolving technology changes and help support the Agency's modular approach, the Vendor shall, on a bi-annual basis, participate in an innovation review session to share potential project ideas and review the status of potential projects proposed by the Vendor. The Vendor shall document and submit recommendations, in accordance with the Strategic Project Portfolio Management Plan, potential project innovations by providing content about the proposed innovations prior to the innovation reviews.

Score: No points will be awarded for the Additional Innovation Opportunities.

Attachments are limited to the following:

- Additional Innovation Opportunity documents and diagrams.

Response:

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 24: Vendor Staffing Requirements

The Respondent shall describe its proposed approach to staffing as described in **Attachment B, Scope of Services**, Section B.3., Services Provided by the EDW Vendor, Sub-Section H., Vendor Staffing Requirements and show how the Respondent's proposed team will implement and support operations during the contract term. At a minimum, the response shall include the following:

1. A proposed Staffing Plan to include resources by position, key staff, roles and responsibilities, and organization structure to support required staffing levels;
2. A staff organization chart which identifies the proposed staff by name and title;
3. A description of key staff (see Figure 8: Key Staff Responsibilities and Qualifications), including their resumes;
4. A list of all additional positions which shall be filled by current employees of the Respondent, and those which need to be acquired;
5. Approach for providing staff to perform the resulting Contract requirements which require a local presence as described in this solicitation, at a location in Tallahassee, Florida; and
6. Proposed local facilities (as described in **Attachment B, Scope of Services**, Section B.3.H.6. Corporate Capability/Service Location) to be used during the Contract term including location, size, security, connectivity, adherence to fire code occupancy limits, and meeting space.

Attachments are limited to the following:

- Draft Staffing Plan;
- Staff Organization Chart;
- Key Staff Resumes; and
- Proposed local facilities.

Response:

SRC# 24 Evaluation Criteria:

1. The adequacy of the Respondent's proposed Staffing Plan, organization structure, list of named resources, and additional positions filled by current employees.
2. The adequacy of the Respondent's approach for providing staff to perform the resulting Contract requirements which require a local presence.

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

3. The adequacy of the Respondent's approach to maintaining Key Staff and additional staff to provide consistent and high-quality products and services.
4. The adequacy of the Respondent's proposed local facilities to be used during the contract term.

Score: This Section is worth a maximum of 20 raw points with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

SRC# 25: EDW Solution Turnover

The Respondent shall demonstrate its capability to fulfill the turnover and project closeout requirements described in **Attachment B, Scope of Services**, Section B.3., Services Provided by the EDW Vendor, Sub-Sections F., Service Requirements, Item 8.c.25), **PD-25: Vendor Turnover Plan** and I., Contract Requirements, Item 2., EDW Solution Turnover. At a minimum, the Respondent shall develop a draft FX Vendor Turnover Plan which includes:

1. Transition of services to a new vendor or other designated entity at the end of this Contract;
2. Project Schedule to include activities, milestones, and key deliverables;
3. Perform a documentation inventory analysis and build a migration plan to populate all documentation in an Agency identified and hosted repository for any applicable documentation;
4. Maintain required staffing throughout the Contract term, in accordance with this Contract requirement;
5. Documentation of skillsets and training needs required for transitioning resources; and
6. Perform process shadowing to accelerate knowledge transfer.

Attachments are limited to the following:

- Draft Vendor Turnover Plan

Response:

SRC# 25 Evaluation Criteria:

1. The adequacy and viability of the Respondent's Draft Vendor Turnover Plan which includes:
 - a. Resource staffing requirements through the end of the resulting Contract term, in accordance with the resulting Contract requirement, documentation of skillsets and training needs required for transitioning resources, process shadowing to accelerate knowledge transfer.
 - b. Process for documentation of inventory and migration to an Agency-hosted repository for any applicable documentation not stored on an Agency-hosted repository at the time of turnover.
 - c. Project Schedule and documentation of skillsets and training needs required for transitioning resources.

EXHIBIT A-4
SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA
COMPONENTS (TECHNICAL RESPONSE) (October 7, 2019)

2. The adequacy of the Respondents ability to:
- a. Provide the Agency and Agency authorized vendors with on-demand access to all solution components, including source, configuration, executables, models, artifacts, processes, and solution data;
 - b. Transition quickly to alternative hosting, infrastructure and service providers;
 - c. Use vendor, contracted or sub contracted services and assets, and multiple solution providers;
 - d. Operate in parallel during transition to an alternate solution;
 - e. Continue operation at an equivalent cost of service; and
 - f. Provide timely and accurate transition materials including documentation and training.

Score: This Section is worth a maximum of 45 points for the above components with each of the above components being worth a maximum of 5 points each.

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EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)

For costs related to the Enterprise Data Warehouse, the Vendor shall be paid based on the deliverables presented in **Attachment B, Section B.3.F.8**. Cost presented should be all inclusive, and the Vendor shall provide estimated hours and hourly costs for all resources supporting the deliverable(s). The Agency anticipates a two-year design and development period, followed by a five-year Operations and Maintenance period. The design and development period is negotiable dependent upon the Vendor's solution. This contract arrangement will allow for up to 7 renewal years.

The Vendor shall provide costs associated with each Deliverable in **Attachment A**, Instructions and Special Conditions, **Exhibit A-5-a**, Detailed Budget.

For the deliverable titled **PD-6: Bill of Materials**, costs shall be presented for the effort to conduct the work at a fixed price and for the Bill of Materials. The Agency will determine whether the items on the Bill of Materials will be purchased and paid as a cost reimbursement to the Vendor, or whether the items will be purchased directly by the Agency. For those items purchased by the Vendor, these materials are to be purchased for and licensed to the Agency. Actual expenditures for specified items made on the Agency's behalf will be reimbursed without profit or overhead for the term of the resulting Contract.

The cost sum of the deliverables under the category of Project Planning Deliverables cannot exceed more than fifteen percent (15%) of the cost of the Total Fixed Price Deliverables as shown in **Attachment A**, Instructions and Special Conditions, **Exhibit A-5-a**, Detailed Budget.

For all fixed price deliverables, except **PD-25: Vendor Turnover Plan**, the Agency will pay the Vendor upon the completion and acceptance of deliverables in accordance with the deliverable schedule specified in the resulting Contract. Upon receipt and Agency approval of each deliverable, the Vendor shall be paid ninety percent (90%) of the total amount due for the deliverable. The Agency will pay the Vendor the remaining ten percent (10%) for all satisfactorily completed deliverables upon completion of the warranty term.

1. Monthly Fixed Price Costs for Operations and Maintenance (O&M):

The EDW Vendor shall provide their monthly fixed price cost for ongoing Operations and Maintenance of the EDW Solution as outlined in the requirements in **Attachment B, Section B.3.F.3.h.**, Operations and Maintenance.

2. Fixed Price Task Orders:

Excluding initial fixed price Deliverables and fixed price costs for ongoing Operations and Maintenance as described in **Sections B.3.F.3.h.**, the Vendor shall incorporate new FX projects into the EDW solution, provide major software updates(outside the scope of normal Operations and Maintenance), and provide services as described within this Contract, which shall be authorized as task orders. The Vendor's work will be managed by the Agency Contract Manager who shall issue written authorization to work in the form of individual task orders. Each task order shall include: project or service requirements (Scope of Services); activities; activities the Vendor expects the Agency to perform; timelines; staffing plan; specific fixed price deliverables, milestones and delivery dates; bill of materials which will be purchased as a cost reimbursement to the Agency and paid as a cost reimbursement to the Vendor. The Vendor is not authorized to initiate work on any task order prior to approval by the Agency. The Vendor is also not authorized to perform work on any task order beyond the services completion date as identified in the individual task order unless approved by the Agency and reduced to writing in the form of a change order to the task order. Task orders shall be paid on a fixed price deliverable basis. The format and processes associated with task orders shall be developed during contract initiation activities.

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

For One-time deliverables, provide detailed cost information supporting the total cost provided in the Summary tab including roles, hourly rates by role, hours by role, and total cost by role. Role titles are provided as examples. The respondent should add or remove role titles as necessary to reflect their proposed staffing for the deliverable. If additional roles are needed, insert rows. The respondent is responsible for ensuring that formulas are correct and totals are accurate.

Project Planning				
DELIVERABLE TITLE	ROLE	HOURLY RATE	HOURS	TOTAL
PD-1: Project Management Plan (Includes Vendor Resource Management Plan)	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-2: Project Schedule	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-3: High-Level Technical Design	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-4: System Security Plan	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL				\$0.00
Project Closeout				
PD-25: Vendor Turnover Plan	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

The following proposed detailed budget shall include costs required for providing the services specified in this solicitation, including Project Closeout costs, and shall support and justify the costs as provided in Exhibit A-5, Cost Proposal.

The PD column refers to Attachment B, Scope of Services, Section B.3.F.8, Deliverable Requirements. Record costs in unshaded cells only. The sum of the deliverables for Project Planning costs cannot exceed fifteen percent (15%) of the total cost of the Fixed Price Deliverables.

FIXED PRICE DELIVERABLES	Year 1 and 2 Design and Development		TOTAL
	ONE-TIME	PD	
Project Planning			
PD-1: Project Management Plan (Includes Vendor Resource Management Plan)	\$0.00		
PD-2: Project Schedule	\$0.00		
PD-3: High-Level Technical Design	\$0.00		
PD-4: System Security Plan	\$0.00		
Requirements			
PD-5: Requirements Document		\$0.00	
Hardware & Software			
PD-6: Bill of Materials		\$0.00	
Design			
PD-7: Technical Infrastructure Plan		\$0.00	
PD-8: Requirement Traceability Matrix		\$0.00	
PD-9: System Design Document (Architecture Specifications)		\$0.00	
PD-10: Data Conversion/Migration Plan		\$0.00	
PD-11: Implementation Plan/Software Release Plan		\$0.00	
PD-12: Configuration Management and Release Management Plan		\$0.00	
PD-13: Contingency Plan (for Disaster Recovery and Business Continuity)		\$0.00	
PD-14: Interface Control Document		\$0.00	
PD-15: Test Plan		\$0.00	
Configure/Build			

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

PD-16: Environmental Readiness Review (Includes Construction Completion Approval and Report)		\$0.00	
Testing			
PD-17: Implementation Readiness Review (Includes System, Security, and Performance Test Completion and Report)		\$0.00	
Training			
PD-18: Organizational Change Management (includes Training Plan)		\$0.00	
PD-19: Operations and Maintenance Manual		\$0.00	
Implementation			
PD-20: Production Readiness Review and Stage Gate Review		\$0.00	
PD-21: Post Implementation Report		\$0.00	
PD-22: Operational Readiness Review (ORR)			
PD-23: Warranty Completion Report		\$0.00	
PD-24: Annual Operational Analysis			
EDW Project Closeout			
PD-25: Vendor Turnover Plan	\$0.00		
TOTAL FIXED PRICE DELIVERABLES	\$0.00	\$0.00	\$0.00



	YEAR ONE	YEAR TWO	YEAR THREE	YEAR FOUR	YEAR FIVE	TOTAL
FIXED PRICE O&M						
Annual Fixed Price (From Monthly O&M tab)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

For **deployment deliverables**, provide detailed cost information supporting the total cost provided in the Summary tab. Costs shall include roles, hourly rates by role, hours by role, and total cost by role. Role titles are provided as examples. The respondent should add or remove role titles as necessary to reflect their proposed staffing for the deliverable. If additional roles are needed, insert rows. For the bill of materials included in the first listed deliverable, provide a bill of materials total, which shall be detailed in the table titled "Bill of Materials Detail". In the Bill of Materials Detail table, provide a detailed item description, count, cost and total for each item. If additional items are needed, insert rows. The respondent is responsible for ensuring that all formulas in the Detailed Budget are correct and totals are accurate.

Deployment Deliverables				
PAYMENT DELIVERABLE TITLE	ROLE	HOURLY RATE	HOURS	TOTAL
Requirements				
PD-5: Requirements Document	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
Hardware & Software				
PD-6: Bill of Materials	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
	BILL OF MATERIALS TOTAL			\$0.00
TOTAL			-	\$0.00
Design				
PD-7: Technical Infrastructure Plan	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-8: Requirement Traceability Matrix	Account Manager/Project Director			\$0.00

BILL OF MATERIALS DETAIL	ITEM DESCRIPTION	COUNT	COST	TOTAL
Bill of Materials Detail				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
TOTAL				\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-9: System Design Document (Architecture Specifications)	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-10: Data Conversion/Migration Plan	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-11: Implementation Plan/Software Release Plan	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-12: Configuration Management and Release Management Plan	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-13: Contingency Plan (for Disaster Recovery and Business Continuity)	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-14: Interface Control Document	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-15: Test Plan	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
Configure/Build				
PD-16: Environmental Readiness Review (Includes Construction Completion Approval and Report)	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			\$0.00	\$0.00
Testing				
PD-17: Implementation Readiness Review (Includes System, Security, and Performance Test Completion and Report)	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
Training				
PD-18: Organizational Change Management (includes Training Plan)	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-19: Operations and Maintenance Manual	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
Implementation				
PD-20: Production Readiness Review and Stage Gate Review	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-21: Post Implementation Report	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-22: Operational Readiness Review (ORR)	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-23: Warranty Completion Report	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00
	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00
PD-24: Annual Operational Analysis	Account Manager/Project Director			\$0.00
	Deputy Project Director			\$0.00
	Implementation Manager			\$0.00
	Operational & Maintenance Manager			\$0.00
	Business Analysis Manager			\$0.00
	Enterprise Architect			\$0.00
	Quality Assurance/Testing Manager			\$0.00

EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)

	Technical Manager			\$0.00
	Reporting and Analytics Manager			\$0.00
	Operations Technical Manager			\$0.00
TOTAL			-	\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

For Complexity deliverables, provide detailed cost information supporting the total cost provided in the Summary tab. Costs shall include roles, hourly rates by role, hours by role, and total cost by role. Role titles are provided as examples. The respondent should add or remove role titles as necessary to reflect their proposed staffing for the deliverable. If additional roles are needed, insert rows. The respondent is responsible for ensuring that all formulas in the Detailed Budget are correct and totals are accurate.

DELIVERABLE TITLE	ROLE	HOURLY RATE	HOURS	TOTAL	HOURLY RATE	HOURS	TOTAL	HOURLY RATE	HOURS	TOTAL
Requirement		Complexity								
		Simple			Medium			Complex		
Data Marts	Account Manager/Project Director			\$0.00			\$0.00			\$0.00
	Deputy Project Director			\$0.00			\$0.00			\$0.00
	Implementation Manager			\$0.00			\$0.00			\$0.00
	Operational & Maintenance Manager			\$0.00			\$0.00			\$0.00
	Business Analysis Manager			\$0.00			\$0.00			\$0.00
	Enterprise Architect			\$0.00			\$0.00			\$0.00
	Quality Assurance/Testing Manager			\$0.00			\$0.00			\$0.00
	Technical Manager			\$0.00			\$0.00			\$0.00
	Reporting and Analytics Manager			\$0.00			\$0.00			\$0.00
	Operations Technical Manager			\$0.00			\$0.00			\$0.00
TOTAL			-	\$0.00		-	\$0.00		-	\$0.00
Requirement		Complexity								
		Simple			Medium			Complex		
Specialized Data Stores	Account Manager/Project Director			\$0.00			\$0.00			\$0.00
	Deputy Project Director			\$0.00			\$0.00			\$0.00
	Implementation Manager			\$0.00			\$0.00			\$0.00
	Operational & Maintenance Manager			\$0.00			\$0.00			\$0.00
	Business Analysis Manager			\$0.00			\$0.00			\$0.00
	Enterprise Architect			\$0.00			\$0.00			\$0.00
	Quality Assurance/Testing Manager			\$0.00			\$0.00			\$0.00
	Technical Manager			\$0.00			\$0.00			\$0.00
	Reporting and Analytics Manager			\$0.00			\$0.00			\$0.00
	Operations Technical Manager			\$0.00			\$0.00			\$0.00
TOTAL			-	\$0.00		-	\$0.00		-	\$0.00
Requirement		Complexity								
		Simple			Medium			Complex		

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

Reports	Account Manager/Project Director			\$0.00			\$0.00			\$0.00	
	Deputy Project Director			\$0.00			\$0.00			\$0.00	
	Implementation Manager			\$0.00			\$0.00			\$0.00	
	Operational & Maintenance Manager			\$0.00			\$0.00			\$0.00	
	Business Analysis Manager			\$0.00			\$0.00			\$0.00	
	Enterprise Architect			\$0.00			\$0.00			\$0.00	
	Quality Assurance/Testing Manager			\$0.00			\$0.00			\$0.00	
	Technical Manager			\$0.00			\$0.00			\$0.00	
	Reporting and Analytics Manager			\$0.00			\$0.00			\$0.00	
	Operations Technical Manager			\$0.00			\$0.00			\$0.00	
TOTAL			-	\$0.00		-	\$0.00		-	\$0.00	
Requirement					Complexity						
			Simple		Medium			Complex			
Dashboards	Account Manager/Project Director			\$0.00			\$0.00			\$0.00	
	Deputy Project Director			\$0.00			\$0.00			\$0.00	
	Implementation Manager			\$0.00			\$0.00			\$0.00	
	Operational & Maintenance Manager			\$0.00			\$0.00			\$0.00	
	Business Analysis Manager			\$0.00			\$0.00			\$0.00	
	Enterprise Architect			\$0.00			\$0.00			\$0.00	
	Quality Assurance/Testing Manager			\$0.00			\$0.00			\$0.00	
	Technical Manager			\$0.00			\$0.00			\$0.00	
	Reporting and Analytics Manager			\$0.00			\$0.00			\$0.00	
	Operations Technical Manager			\$0.00			\$0.00			\$0.00	
TOTAL			-	-		-	-		-	-	
Requirement					Complexity						
			Simple		Medium			Complex			
Application Migration to ODS	Account Manager/Project Director			\$0.00			\$0.00			\$0.00	
	Deputy Project Director			\$0.00			\$0.00			\$0.00	
	Implementation Manager			\$0.00			\$0.00			\$0.00	
	Operational & Maintenance Manager			\$0.00			\$0.00			\$0.00	
	Business Analysis Manager			\$0.00			\$0.00			\$0.00	
	Enterprise Architect			\$0.00			\$0.00			\$0.00	
	Quality Assurance/Testing Manager			\$0.00			\$0.00			\$0.00	

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

	Technical Manager			\$0.00			\$0.00		\$0.00	
	Reporting and Analytics Manager			\$0.00			\$0.00		\$0.00	
	Operations Technical Manager			\$0.00			\$0.00		\$0.00	
TOTAL			-	-		-	-		-	
Requirement			Complexity							
			Simple			Medium			Complex	
Data Models	Account Manager/Project Director			\$0.00			\$0.00		\$0.00	
	Deputy Project Director			\$0.00			\$0.00		\$0.00	
	Implementation Manager			\$0.00			\$0.00		\$0.00	
	Operational & Maintenance Manager			\$0.00			\$0.00		\$0.00	
	Business Analysis Manager			\$0.00			\$0.00		\$0.00	
	Enterprise Architect			\$0.00			\$0.00		\$0.00	
	Quality Assurance/Testing Manager			\$0.00			\$0.00		\$0.00	
	Technical Manager			\$0.00			\$0.00		\$0.00	
	Reporting and Analytics Manager			\$0.00			\$0.00		\$0.00	
	Operations Technical Manager			\$0.00			\$0.00		\$0.00	
TOTAL			-	\$0.00		-	\$0.00		-	
Requirement			Complexity							
			Simple			Medium			Complex	
Data Migration	Account Manager/Project Director			\$0.00			\$0.00		\$0.00	
	Deputy Project Director			\$0.00			\$0.00		\$0.00	
	Implementation Manager			\$0.00			\$0.00		\$0.00	
	Operational & Maintenance Manager			\$0.00			\$0.00		\$0.00	
	Business Analysis Manager			\$0.00			\$0.00		\$0.00	
	Enterprise Architect			\$0.00			\$0.00		\$0.00	
	Quality Assurance/Testing Manager			\$0.00			\$0.00		\$0.00	
	Technical Manager			\$0.00			\$0.00		\$0.00	
	Reporting and Analytics Manager			\$0.00			\$0.00		\$0.00	
	Operations Technical Manager			\$0.00			\$0.00		\$0.00	
TOTAL			-	-		-	-		-	
Requirement			Complexity							
			Simple			Medium			Complex	
Establishing Data Services	Account Manager/Project Director			\$0.00			\$0.00		\$0.00	

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

	Deputy Project Director			\$0.00			\$0.00			\$0.00	
	Implementation Manager			\$0.00			\$0.00			\$0.00	
	Operational & Maintenance Manager			\$0.00			\$0.00			\$0.00	
	Business Analysis Manager			\$0.00			\$0.00			\$0.00	
	Enterprise Architect			\$0.00			\$0.00			\$0.00	
	Quality Assurance/Testing Manager			\$0.00			\$0.00			\$0.00	
	Technical Manager			\$0.00			\$0.00			\$0.00	
	Reporting and Analytics Manager			\$0.00			\$0.00			\$0.00	
	Operations Technical Manager			\$0.00			\$0.00			\$0.00	
TOTAL			-	\$0.00			\$0.00		-	\$0.00	
Requirement					Complexity						
			Simple			Medium			Complex		
RDS/EDW/Data Mart Models	Account Manager/Project Director			\$0.00			\$0.00			\$0.00	
	Deputy Project Director			\$0.00			\$0.00			\$0.00	
	Implementation Manager			\$0.00			\$0.00			\$0.00	
	Operational & Maintenance Manager			\$0.00			\$0.00			\$0.00	
	Business Analysis Manager			\$0.00			\$0.00			\$0.00	
	Enterprise Architect			\$0.00			\$0.00			\$0.00	
	Quality Assurance/Testing Manager			\$0.00			\$0.00			\$0.00	
	Technical Manager			\$0.00			\$0.00			\$0.00	
	Reporting and Analytics Manager			\$0.00			\$0.00			\$0.00	
	Operations Technical Manager			\$0.00			\$0.00			\$0.00	
TOTAL			-	\$0.00			\$0.00		-	\$0.00	

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

Provide the detail to support the proposed monthly fixed price for Operations and Maintenance (O&M) for both the initial five (5) year term and the potential seven (7) renewal years. Input data in unshaded cells only for the role, the hourly rates and the number of estimated monthly hours. If additional roles are needed, insert rows. The respondent is responsible for ensuring that formulas are correct and totals are accurate. The annual fixed price O&M is calculated by multiplying the Monthly total by twelve (12).

MONTHLY FIXED PRICE O&M (YEAR 1)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00
YEAR 1 - MONTHLY FIXED PRICE		-	\$0.00
YEAR 1 - OPERATIONS AND MAINTENANCE		X12	\$0.00

MONTHLY FIXED PRICE O&M (YEAR 2)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00
YEAR 2 - MONTHLY FIXED PRICE		-	\$0.00
YEAR 2 - OPERATIONS AND MAINTENANCE		X12	\$0.00

MONTHLY FIXED PRICE O&M (YEAR 3)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00
YEAR 3 - MONTHLY FIXED PRICE		-	\$0.00
YEAR 3 - OPERATIONS AND MAINTENANCE		X12	\$0.00

MONTHLY FIXED PRICE O&M (YEAR 4)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00
YEAR 4 - MONTHLY FIXED PRICE		-	\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

YEAR 4 - OPERATIONS AND MAINTENANCE		X12	\$0.00
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MONTHLY FIXED PRICE O&M (YEAR 5)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00
YEAR 5 - MONTHLY FIXED PRICE		-	\$0.00
YEAR 5 - OPERATIONS AND MAINTENANCE		X12	\$0.00

MONTHLY FIXED PRICE O&M (RENEWAL YEAR 1)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00
RENEWAL YEAR 1 - MONTHLY FIXED PRICE		-	\$0.00
RENEWAL YEAR 1 - OPERATIONS AND MAINTENANCE		X12	\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

MONTHLY FIXED PRICE O&M (RENEWAL YEAR 2)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00
RENEWAL YEAR 2 - MONTHLY FIXED PRICE		-	\$0.00
RENEWAL YEAR 2 - OPERATIONS AND MAINTENANCE		X12	\$0.00

MONTHLY FIXED PRICE O&M (RENEWAL YEAR 3)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00
RENEWAL YEAR 3 - MONTHLY FIXED PRICE		-	\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

RENEWAL YEAR 3 - OPERATIONS AND MAINTENANCE		X12	\$0.00
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MONTHLY FIXED PRICE O&M (RENEWAL YEAR 4)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00
RENEWAL YEAR 4 - MONTHLY FIXED PRICE		-	\$0.00
RENEWAL YEAR 4 - OPERATIONS AND MAINTENANCE		X12	\$0.00

MONTHLY FIXED PRICE O&M (RENEWAL YEAR 5)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

RENEWAL YEAR 5 - MONTHLY FIXED PRICE		-	\$0.00
RENEWAL YEAR 5 - OPERATIONS AND MAINTENANCE		X12	\$0.00

MONTHLY FIXED PRICE O&M (RENEWAL YEAR 6)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00
Add additional rows for additional roles...			\$0.00
RENEWAL YEAR 6 - MONTHLY FIXED PRICE		-	\$0.00
RENEWAL YEAR 6 - OPERATIONS AND MAINTENANCE		X12	\$0.00

MONTHLY FIXED PRICE O&M (RENEWAL YEAR 7)	HOURLY RATE	HOURS	TOTAL
Account Manager/Project Director			\$0.00
Deputy Project Director			\$0.00
Implementation Manager			\$0.00
Operational & Maintenance Manager			\$0.00
Business Analysis Manager			\$0.00
Enterprise Architect			\$0.00
Quality Assurance/Testing Manager			\$0.00
Technical Manager			\$0.00
Reporting and Analytics Manager			\$0.00
Operations Technical Manager			\$0.00

EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)

Add additional rows for additional roles...			\$0.00
RENEWAL YEAR 7 - MONTHLY FIXED PRICE		-	\$0.00
RENEWAL YEAR 7 - OPERATIONS AND MAINTENANCE		X12	\$0.00

**EXHIBIT A-5-a
DETAILED BUDGET (October 7, 2019)**

Provide hourly rates by role (as per Attachment B, Scope of Services, Section B.3.H., Vendor Staffing) for each of the five (5) base contract years and the potential seven (7) renewal years. Hourly rates shall be used as the basis for fixed price deliverables, monthly fixed price costs for Operations and Maintenance, and fixed price task orders. Add additional rows for additional roles not named in the table.

ROLE	ALL INCLUSIVE HOURLY RATES											
	BASE OPERATIONAL CONTRACT YEARS					RENEWAL CONTRACT YEARS						
	YEAR ONE (1)	YEAR TWO (2)	YEAR THREE (3)	YEAR FOUR (4)	YEAR FIVE (5)	YEAR ONE (1)	YEAR TWO (2)	YEAR THREE (3)	YEAR FOUR (4)	YEAR FIVE (5)	YEAR SIX (6)	YEAR SEVEN (7)
Account Manager/Project Director												
Deputy Project Director												
Implementation Manager												
Operational & Maintenance Manager												
Business Analysis Manager												
Enterprise Architect												
Quality Assurance/Testing Manager												
Technical Manager												
Reporting and Analytics Manager												
Operations Technical Manager												
<i>Add Rows for additional Roles as Necessary</i>												

ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

Table of Contents

B.1.	General Overview	8
A.	Background	8
1.	Transforming to a Modular Processing Solution.....	9
2.	A Strategy Driven Approach to Transformation	10
3.	Transition to the Future State.....	11
a.	FX Current State	11
b.	Future State: IS/IP.....	12
c.	Future State: EDW	13
d.	Future State: Modular Processing Systems and Services.....	14
B.	Purpose	15
1.	Introduction	15
2.	Vision.....	16
3.	Approach	18
4.	High Level Scope.....	18
a.	Operational Data Store Management	19
b.	Analytic Data Management and Tools	19
c.	Content Management.....	19
d.	Data Management / Organizational Transformation.....	19
5.	Anticipated Implementation Approach.....	20
a.	Initial Implementation.....	20
b.	Task Order Implementation	21
C.	EDW Procurement Library	21
D.	Roles and Responsibilities (Summary)	21
1.	Agency FX Team	21
2.	Centers for Medicare and Medicaid Services (CMS).....	22
3.	Strategic Enterprise and Advisory Services (SEAS) Vendor.....	22
4.	Independent Verification & Validation (IV&V)	22
5.	Integration Service and Integration Platform (IS/IP) Vendor	22
6.	Enterprise Data Warehouse (EDW) Vendor	22
7.	FX Module Vendors	22
8.	Governance	22
E.	Procurement Restrictions	23
B.2.	Services Provided by the Agency, SEAS, and IS/IP Vendor	23
A.	Agency Services	23
B.	Services Provided by SEAS Vendor	23

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

C.	Services Provided by the IS/IP Vendor	24
1.	Integration Platform Solution	24
a.	Enterprise Service Bus (ESB);.....	24
b.	Service Management;.....	24
c.	Managed File Transfer (MFT);.....	25
d.	Business Rules Engine;.....	25
e.	Security;	25
f.	Master Data Management (MDM);	25
2.	Integration Services Solution.....	25
a.	Systems Interoperability;	25
b.	Interface Integration; and.....	25
c.	Legacy System Transition Integration.....	25
B.3.	Services Provided by the EDW Vendor	25
A.	Introduction to Requirements.....	25
B.	Business Outcome Requirements.....	26
1.	Mandatory Business Outcomes	26
2.	Targeted Business Outcomes	27
3.	MITA Maturity Outcomes	27
C.	Business Requirements.....	27
1.	Component Specific Business Requirements.....	27
2.	Reporting Requirements	28
3.	Business Unit Specific Requirements.....	30
D.	User Requirements.....	32
1.	Stakeholder Requirements.....	32
2.	Persona Type Specific Requirements	33
E.	Technology Solution Requirements.....	34
1.	FX Enterprise Requirements	34
a.	FX Technology Standards and Compliance.....	34
b.	Hosting and Environments.....	35
c.	Disaster Recovery and Business Continuity	38
d.	Performance Standards.....	41
e.	Security Requirements	43
2.	Technology Solution Component Specific Requirements	44
a.	Operational Data Store (ODS).....	44
b.	Component Specific Solution Requirements.....	46
c.	Data Conversion and Migration	46

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

d.	Data Replication	47
e.	Integration and Data Services	49
f.	Enterprise Analytic Data Store.....	50
g.	Persona Optimized Analytics & Reporting (POAR).....	52
h.	Specialized Data Stores (SDS).....	55
i.	Solution Component Specific Requirements.....	56
3.	Project Life Cycle Tool Requirements	61
a.	Project Management Tool Requirements.....	61
b.	System Delivery Management Tool Requirements	61
F.	Services Requirements	62
1.	Contract Wide Services Requirements.....	62
a.	Reporting Requirements.....	62
2.	Project Management Life Cycle Requirements.....	63
a.	Project Management Requirements – Contract Wide	63
3.	System Delivery Life Cycle Phase Requirements.....	64
a.	Initiation Phase Requirements	64
b.	Planning Phase Requirements	64
c.	Requirements Analysis Phase Requirements	64
d.	Design Phase Requirements	64
e.	Development Phase Requirements	66
f.	Testing Phase Requirements	66
g.	Implementation Phase Requirements	69
h.	Operations and Maintenance Phase Requirements.....	70
i.	Help Desk / Incident Management.....	72
j.	Training Requirements	72
k.	Warranty Requirements.....	73
	Disposition Phase Requirements	74
4.	Security Life Cycle	74
5.	Certification Life Cycle	75
a.	Enhanced Funding Requirement - CMS Standards and Conditions.....	76
b.	MECT Module Checklist Requirements	77
c.	MECT Core Checklist Requirements	86
6.	Other Project Services	95
a.	Data Management Framework Services Requirements.....	95
b.	Application Data Migration to ODS	96
7.	Project Artifact Requirements.....	96

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

a.	System Documentation and User Documentation	96
b.	List of FX Project Artifacts	97
8.	Deliverable Requirements	98
a.	Deliverable Management.....	98
b.	List of Payment Deliverables	99
c.	Payment Deliverable Requirements – Contract Wide	101
d.	List of Deliverables - Module Implementation Projects.....	111
9.	Project Life Cycle Review Requirements.....	112
a.	List of Required Project Life Cycle Reviews.....	113
10.	Solution Component Specific Services Requirements.....	115
a.	Solution Component Services – Data Modeling Tool.....	115
11.	Managed Service Requirements	115
a.	Provided Managed Services Requirements.....	115
b.	Use of Managed Services Requirements.....	116
12.	Data Management Requirements.....	117
a.	Contract Wide Data Management Requirements.....	117
b.	List of Data Types Managed.....	118
c.	Data Type Specific Service Requirements.....	118
G.	Additional Innovation Opportunities	118
H.	Vendor Staffing Requirements	118
1.	General Staffing Requirements	118
2.	Key Staff	119
3.	Qualification Documents Required	127
4.	Staffing Levels	127
5.	Subcontracting.....	128
6.	Corporate Capability/Service Location	128
I.	Contract Requirements	128
1.	Order of Precedence.....	128
2.	Standard Contract Requirements.....	128
a.	Prohibition of Marketing.....	128
b.	Funding Source	129
c.	Most Favored Customer	129
d.	Expert Witness	129
e.	Performance Standards, Liquidated Damages and Financial Consequences	129
f.	Sanctions	132

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

g.	Disputes	133
3.	EDW Solution Turnover	134
a.	EDW Vendor Responsibilities:.....	134
b.	Agency Responsibilities:.....	135
B.4.	Cost Proposal.....	136
A.	Overview of Cost Proposal	136
B.	Method of Payment	136
B.5.	Program Reference	139
A.	External Stakeholders	139
B.	Definitions and Acronyms	141

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**ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)**

List of Figures

Figure 1: Current State (Illustrative)	12
Figure 2: IS/IP Future State (Illustrative)	13
Figure 3: EDW Project Future State (Illustrative)	14
Figure 4: Modular Future State (Illustrative)	15
Figure 5: MES Conceptual Level Diagram	17
Figure 6: Payment Deliverables	100
Figure 7: Module Implementation Project Deliverables	111
Figure 8: Key Staff Responsibilities and Qualifications	119
Figure 9: Anticipated Roles - External Stakeholders	139
Figure 10: Definitions and Acronyms	141

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**ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)**

List of Tables

Table: 1 - Component Specific Business Requirements	27
Table: 2 - Reporting Requirements	29
Table: 3 - Business Unit Specific Requirements	30
Table: 4 - Stakeholder Requirements	32
Table: 5 - Persona Type Requirements	33
Table: 6 - Standards and Compliance Requirements	35
Table: 7 - Hosting and Environments Requirements	36
Table: 8 - Disaster Recovery and Business Continuity Requirements	38
Table: 9 - Performance Standards	41
Table: 10 - Security Requirements	43
Table: 11 - Operational Data Store and Content Management Requirements	44
Table: 12 - Component Specific Solution Requirements	46
Table: 13 - Data Conversion and Migration Requirements	46
Table: 14 - Data Replication Requirements	47
Table: 15 - Integration and Data Services Requirements	49
Table: 16 - Enterprise Analytic Data Store Requirements	50
Table: 17 - Persona Optimized Analytics & Reporting (POAR) Requirements	52
Table: 18 - Specialized Data Stores (SDS) Requirements	55
Table: 19 - Data Dictionary Tool Requirements	57
Table: 20 - Metadata Management Tool and Repository Requirements	58
Table: 21 - ETL Management	59
Table: 22 - List of Additional Solution Capabilities	60
Table: 23 - Data Modeling Requirements	64
Table: 24 - Testing Phase Requirements	66
Table: 25 - Implementation Phase Requirements	69
Table: 26 - Operations and Maintenance Phase Requirements	70
Table: 27 - Help Desk / Incident Management Requirements	72
Table: 28 - Training Requirements	72
Table: 29 - Disposition Phase Requirements	74
Table: 30 - Security Life Cycle Requirements	74
Table: 31 - Federal Certification Requirements	76
Table: 32 - MECT Decision Support System Requirements	77
Table: 33 - MECT Program Integrity Checklist Requirements	83
Table: 34 - MECT Access and Delivery Requirements	86
Table: 35 - MECT Information Architecture Requirements	92
Table: 36 - MECT Integration and Utility Requirements	93
Table: 37 - MECT Intermediary and Interfaces Requirements	94
Table: 38 - MECT Standards and Conditions Requirements	94
Table: 39 - Data Management Framework Responsibilities	95
Table: 40 - Project Phase Life Cycle Reviews	113
Table: 41 - Provided Managed Services Requirements	115
Table: 42 - Use of Managed Services Requirements	116
Table: 43 - Contract Wide Data Management Requirements	117
Table: 44 - General Staffing Requirements	118
Table: 45 - Performance Standards and Liquidated Damages	131

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ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

For purposes of this solicitation, the successful EDW Vendor shall be referred to as “Vendor” and “EDW Vendor”. The Contract or Purchase Order resulting from this solicitation shall be referred to as Contract.

B.1. General Overview

A. Background

The Florida Agency for Health Care Administration, hereinafter referred to as the “Agency”, is preparing for the changing landscape of health care administration and increased use of the Centers for Medicare and Medicaid Services (CMS) Medicaid Information Technology Architecture (MITA) to improve the administration and operation of the current Florida Medicaid Enterprise System (MES). The current Florida MES includes services, business processes, data management and processes, technical processes within the Agency, and those interconnections with systems residing outside the Agency necessary for the administration of the Florida Medicaid program.

The CMS released the Medicaid Program Final Rule: Mechanized Claims Processing and Information Retrieval Systems in December 2015. This final rule modifies regulations pertaining to the 42 Code of Federal Regulations (CFR) 433 and 45 CFR 95.6111, effective January 1, 2016. Among other changes, this final rule supports increased use of the MITA Framework. MITA is a CMS initiative fostering an integrated business and information technology (IT) transformation across the Medicaid Enterprise to improve the administration and operation of the Medicaid program.

The Agency rebranded the Florida Medicaid Enterprise System (MES) to Florida Health Care Connections (FX). The decision was made to reflect this project as a broader project leveraging the Medicaid infrastructure to improve overall Agency functionality and to build better connections to other data sources and programs. Moving forward, the Agency intends to use the term FX when referencing the Florida MES. This document may retain the MES name when referring to the Federal initiative known as MES. The Agency documents its high-level plans to increase service interoperability and advance the maturity of the MES in accordance with the MITA Framework in the FX Procurement Strategy document, located in the [EDW Procurement Library](#).

Florida Health Care Connections (FX) is a multi-year project that will modernize the current Medicaid technology using a modular approach while simultaneously improving overall Agency functionality and build better connections to other data sources and programs. FX will result in the ability to provide better health care by utilizing our resources, technology, and processes more efficiently and effectively. The future state of FX, which cannot yet be fully defined, will have the right technology, utilizing the right resources, based on higher quality data and more efficient processes - all of this leading to a world-class healthcare experience for all Floridians.

The components of the FX enterprise transformation are:

FX Scope - All initiatives which supply an input to or receive an output from the Agency’s mission to provide better health care for all Floridians including Recipients, Providers, Processes, and Technology;

FX Portfolio - The collection of projects to transform the Medicaid Enterprise based on the FX mission;

FX Projects - A project included in the FX Portfolio with a clear objective and defined start and finish date;

FX Vendor - A vendor working on a FX Project; and

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

FX Vision - Transform the Medicaid Enterprise to provide the greatest quality, the best experience, and the highest value in health care.

1. Transforming to a Modular Processing Solution

To enable effective and responsive delivery of health-related services, the Agency is pursuing modular technology and processing solutions that work together seamlessly. Using modular solutions provides processing and operational agility to support the needs of organizations in Florida that deliver health services. A modular approach increases the opportunity to select the best technology and services from vendors while simultaneously avoiding vendor lock-in and the risks associated with a single solution.

To support this transformation, the Agency published and released the FX Procurement Strategy. The FX Procurement Strategy proposes a four-phased approach to replace the current functions of the Florida Medicaid Management Information System (FMMIS) and other Medicaid-related systems. These four phases are based on the CMS Standards and Conditions to ultimately transform Florida's Medicaid systems to an interoperable and unified system where individual processes, modules, systems, and sub-systems work together to operate the Medicaid program. The CMS Standards and Conditions must be met for States to qualify for enhanced Federal funding. This approach is intended to provide the most efficient and cost-effective long-term solution for the system while complying with Federal regulations, achieving Federal certification, and obtaining enhanced Federal funding. Phase 3 and Phase 4 are anticipated to occur concurrently. The four (4) phases of the Procurement Strategy are as follows:

- **Phase 1** is the procurement of a Strategic Enterprise Advisory Services (SEAS) Vendor and an Independent Verification and Validation (IV&V) Vendor. These procurements were completed in the fall of 2017. Information about the SEAS Vendor and IV&V Vendor can be found in **Section B.1.D. Roles and Responsibilities**.
- **Phase 2** of the Procurement Strategy establishes the technical foundation of the modular transformation through the Agency's procurement of an Integration Services and Integration Platform (IS/IP) Solution and an Enterprise Data Warehouse (EDW) Solution. **This solicitation is ONLY for the procurement of EDW Solution.**
- **Phase 3** of the Procurement Strategy leverages the technology foundation established in Phase 2 to integrate and consolidate existing data and systems. In this phase, existing Medicaid-related systems will be integrated into the infrastructure created by IS/IP and EDW and improve processing effectiveness and consistency. Use of the IS/IP enables existing systems to securely share data and processing services in near real-time across system boundaries. Use of the EDW enables systems to securely contribute, update, access, and analyze data from the single, authoritative source, efficiently, and effectively.
- **Phase 4** is the acquisition and implementation of modular processing capabilities, systems and services that upgrade, modernize and replace the functions currently performed by multiple existing systems.

ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

2. A Strategy Driven Approach to Transformation

Integration Services and Integration Platform (IS/IP) and the Enterprise Data Warehouse (EDW) Solution will be the foundational platforms to meet the Agency's strategic priorities. The Agency's strategy includes a plan to assimilate modular solutions to replace current functional systems or subsystems quickly and efficiently as technology evolves.

As the Agency's transformation project is not a "rip and replace" effort, the Agency is taking an iterative approach to transformation. Through strategic planning, facilitated by the SEAS Vendor and the development of Governance within the Agency, the transformation will continue to evolve over the next several years.

As part of the SEAS activities, the Agency and SEAS Vendor hereinafter referred to as the "FX Project Team", developed the strategic and technical plans and standards needed to support the FX enterprise transformation. Included in these plans are the **FX Strategic Plan** and the **MITA Concept of Operations**, located in the [EDW Procurement Library](#). The FX Project Team, used the Procurement Strategy as the basis for the development of the strategy to transform the systems over the next several years.

The Procurement Strategy is continuously being updated to reflect current information and planned activities. The Agency's iterative approach will continue to evolve, and the current Procurement Strategy, plans and standards will continue to be updated, as needed, to support this strategy-driven approach.

Additional details regarding the Procurement Strategy, Strategic Plan, and project plans are located in the [EDW Procurement Library](#).

The **FX Data Management Strategy**, located in the [EDW Procurement Library](#), defines six core data management standards to achieve the business objectives and mission of the Agency:

- **Improve data quality by operating from a single source of truth** - The current, inconsistent application of data edits, validations, and transformations to the many different Agency data stores means there is no single source of truth which causes confusion and lack of trust in the data. This procurement seeks an EDW Solution that facilitates consistent application of data management standards and federates data producing a single source of truth.
- **Evolve core processing over time with data validation at the point of business event data collection** - Future systems should plan to allow health plans and providers to validate and verify claim and encounter data before submission to the Agency.
- **Provide seamless access to a real-time, 360-degree (360°) view of recipient and provider information** - The Agency strategy is to use technology to assemble information in real-time from all relevant sources to make processing and funding decisions using a comprehensive view of recipient and provider information from other FX stakeholder organizations.
- **Decouple data from proprietary systems and application stores** - The Agency FX data management strategy is to manage data as a service with new FX modules using data access services that connect to an Operational Data Store, independent of specific systems or modules.

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

- **Operate with business area and persona optimized Data Marts and data analysis tools** - As it relates to data management strategy, the persona generalizes the types and breadth of data used and processed and the types of tools used to perform a role.
- **Prepare to collect and manage recipient and provider experience and outcome data** - The Agency, health plans, and providers currently have limited recipient, provider experience, or health outcome data. The transformation of the State's Medicaid systems and processes requires the collection, storage, and analysis of these new types of data with new dimensions of analysis.

3. Transition to the Future State

The following transformation diagrams are a high-level representation of the strategy to transform the FX from the current state to the future state (these diagrams are an illustration of what an EDW Solution might look like and are not meant to be the actual outcome).

a. FX Current State

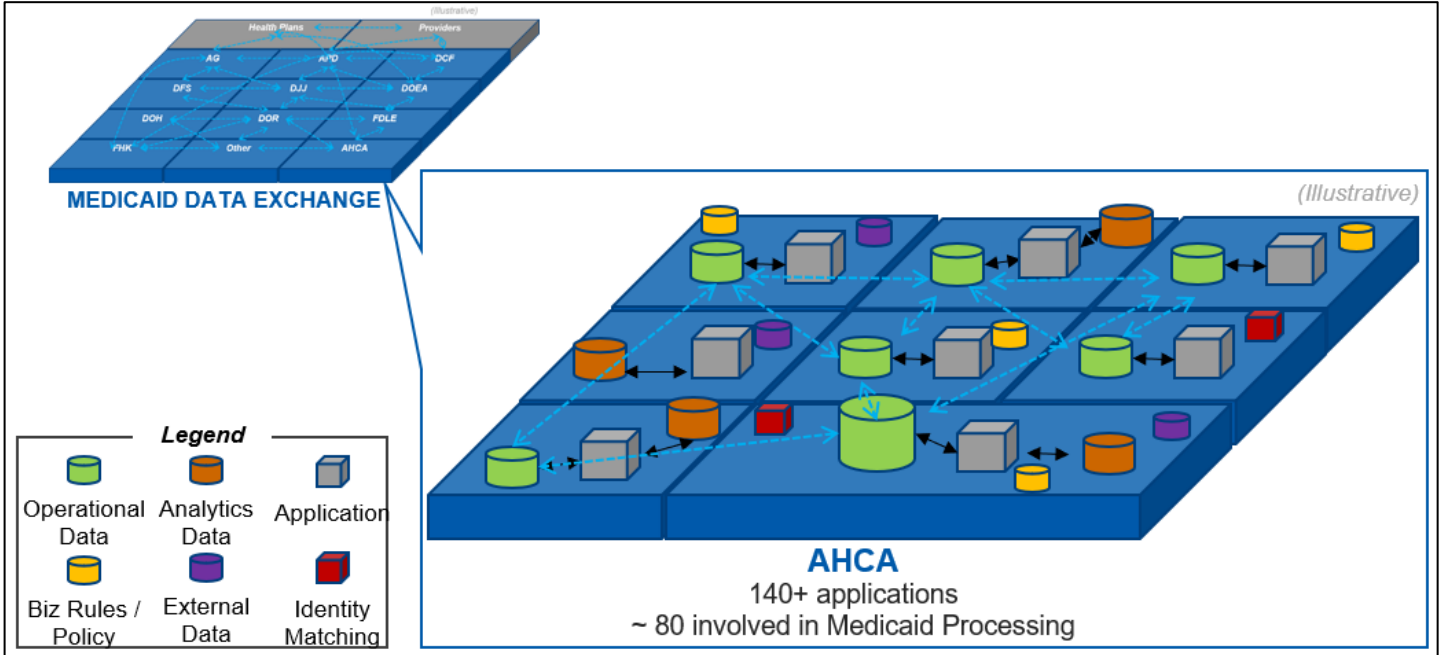
Florida's health care delivery relies on highly distributed processing by many agencies and systems. Agency silos often operate with their own version of data, tools, business rules, software, and strategies. The current data architecture is causing many data challenges. There is no "single source of truth" since each agency and system have their own data. This duplication creates challenges in how agencies share data to perform their day-to-day functions. Likewise, there are roughly eighty (80) applications within the Agency that process Medicaid data—many of which have their own data stores. This is a challenge because the data from one application may not be consistent with the data from another application. As shown in **Figure 1: Current State (Illustrative)** below, the main challenge is data stored across groups within the Agency, causing the following data integrity and availability issues:

- Multiple and often inconsistent versions of data;
- Questions about the completeness, quality, and timeliness of data;
- Poor analytic processing response times; and
- Inconsistency in use of analytics, predictive modeling, and reporting capabilities.

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ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

Figure 1: Current State (Illustrative)



b. Future State: IS/IP

The enterprise integration capabilities of the IS/IP solution will allow Agency systems to be much more efficient in sharing data and services between systems within the Agency, with other agencies, and with partners. Two major goals of the integration platform are (1) reduced duplication of data across systems, and (2) improved data consistency and communication of data changes between systems when there is a business need for data to be duplicated.

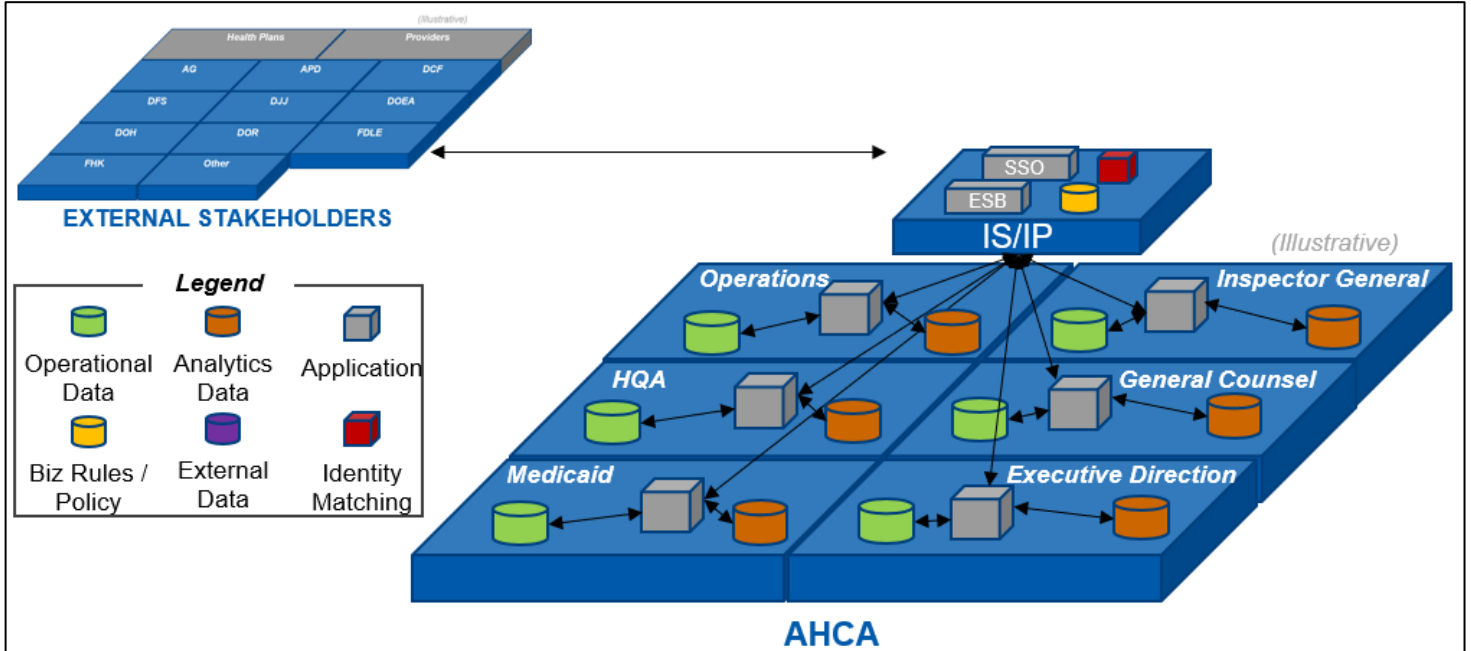
The IS/IP Future State **Figure 2: IS/IP Future State (Illustrative)** below, will enable:

- Near real-time data, processing access and sharing between different organizations and systems, reducing the propagation of duplicated and inconsistent data;
- A 360-degree (360°) view of information by linking data about recipients and providers;
- Application of consistent business rules and policy; and
- Single Sign-on and securing data in transit.

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ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

Figure 2: IS/IP Future State (Illustrative)



c. Future State: EDW

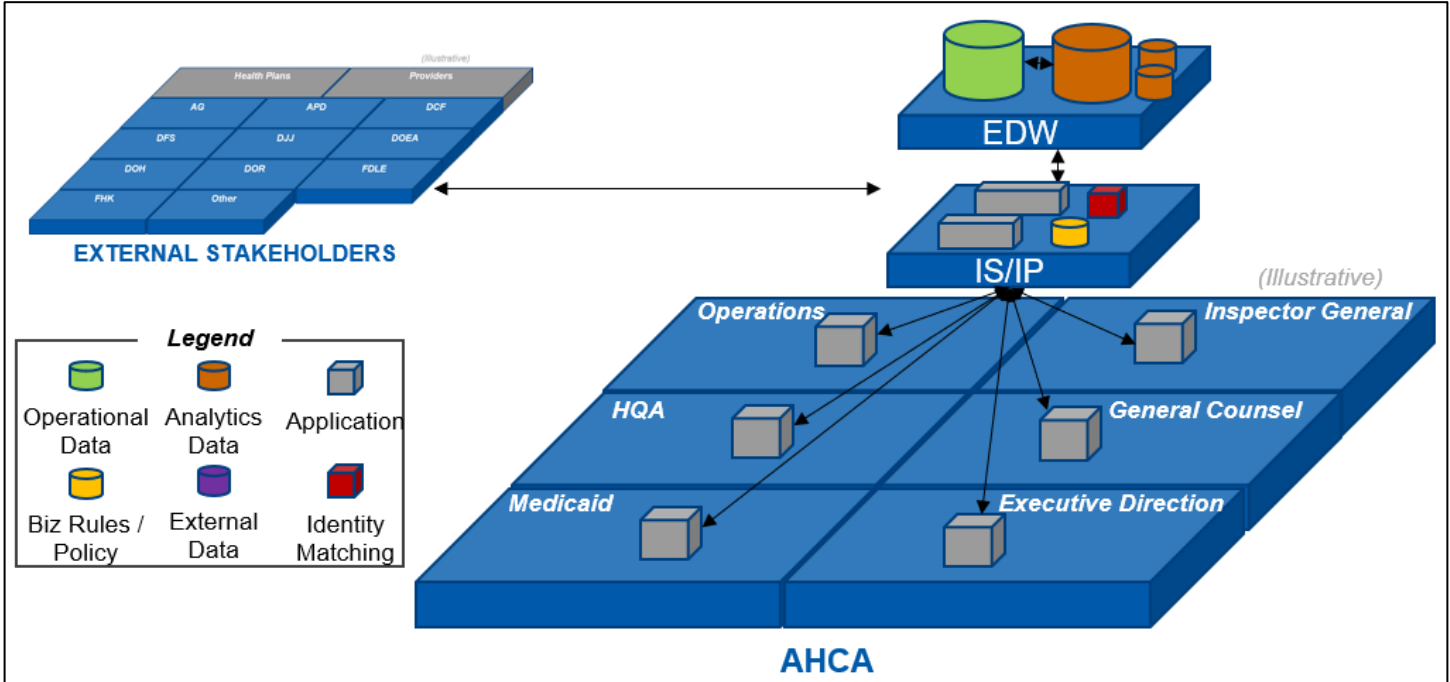
The enterprise data service and analytic capabilities of the Enterprise Data Warehouse Solution will provide Agency stakeholders with enhanced data management and analytics capabilities. The EDW creates a model that promotes having a “single source of truth” for applications to access data from this central source (rather than keeping data within each application). The implementation of the EDW Project will facilitate the decoupling of systems and data to make data available and consistent throughout the ecosystem, which will improve data quality, consistency, and tools for operational data use and analytic processing. The EDW Solution shown in **Figure 3: EDW Project Future State (Illustrative)** below, will enable:

- Single source of truth to improve data quality, accuracy, and accessibility;
- Improved timeliness and consistency of data;
- Improved analytic data processing with holistic business unit and persona optimized Data Marts and tools;
- System innovation and simplified system implementation;
- Elimination of inconsistent data and processing; and
- Reduction in duplicated data.

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ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

Figure 3: EDW Project Future State (Illustrative)



d. Future State: Modular Processing Systems and Services

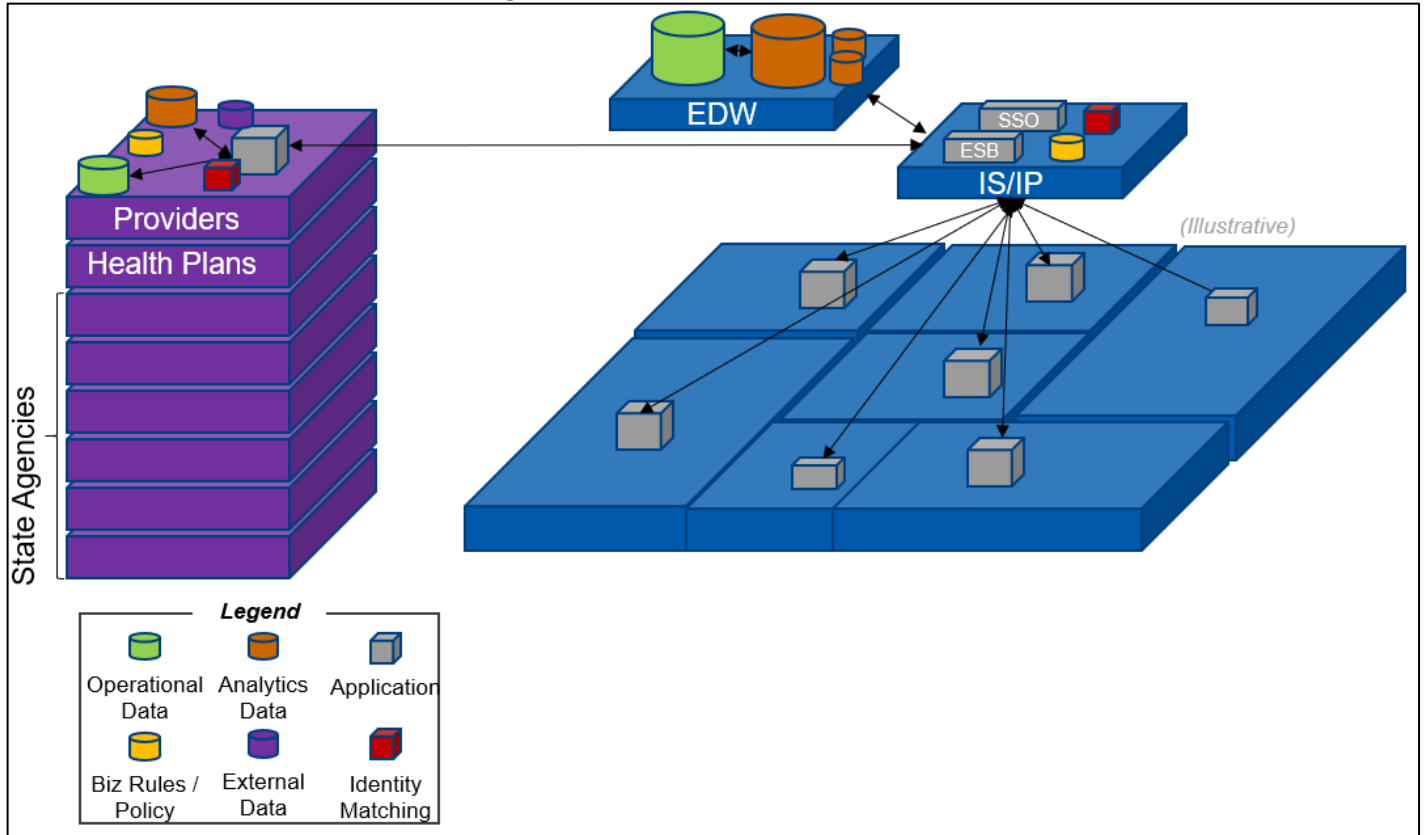
The use of modular processing systems and service capabilities using the real or near real-time data provided by the EDW Solution and applying consistent business rules, will reshape the application landscape, reducing duplicated applications and inconsistent processing. The implementation of Modular Systems shown in **Figure 4: Modular Future State (Illustrative)** below, will:

- Identify and propose improvements to mature operational business processing capabilities;
- Standardize business processing (e.g. enrollment, case management) to improve recipient and provider experience;
- Add new processing without the capacity constraints of a single vendor;
- Enable use of processing services by external organizations and systems;
- Enable high quality and accessible data;
- Improve integration with external partners;
- Reduce complexity;
- Improve focus on and measurement of health care outcomes;
- Enable holistic decision making;
- Use evidence-based processing;
- Improve analytics;
- Reduce fraud, waste and abuse;
- Improve the ease and accuracy of Provider claims payments; and

ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

- Improve the effectiveness of Federal cost reporting to maintain Federal funding eligibility.

Figure 4: Modular Future State (Illustrative)



B. Purpose

1. Introduction

To improve health care for all Floridians, the Agency is modernizing the foundational data management and analytic infrastructure and capabilities used throughout the Agency’s healthcare ecosystem. This modernization effort will enable recipients and other stakeholders with an interest in health care to make better use of information, make better decisions, and promote better outcomes.

The Agency, health plans, providers, and external organizations that strive to deliver quality health care to Floridians rely on quality data to make decisions that affect the health care and services provided to recipients. Agency healthcare and claims data drives operational decisions made for delivering care to individual recipients, policy decisions that improve the overall health delivery system, regulatory decisions that enforce policy decisions and validate service delivery quality, funding needs, and decisions made by recipients that are engaged in their health care. Improving data quality is about providing data that is more accurate, timely, accessible, and relevant to those that use the data.

The Agency is procuring an Enterprise Data Warehouse solution that provides a comprehensive data management and reporting solution to advance the Agency’s goal of transforming to an Enterprise, Modular, and flexible solution. The Agency is procuring the following to meet this requirement:

ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

- 1) Hardware;
- 2) Software;
- 3) Hosting and support services;
- 4) Data stores;
- 5) Data management;
- 6) Data analytics and tools; and
- 7) Optimized analytics and reporting.

2. Vision

Part of the Agency's vision as it relates to healthcare data is to enable all authorized stakeholders to provide and access data from a single source of truth. The single source of truth for operational data will contain high quality information that is complete, accurate, and reflects the real-time events, transactions and information, given the subject of interest (e.g. recipient, provider, health plan, illness, disease, treatment). The Agency's vision is for all organizations to capture information at the point of a business event or transaction and store the authenticated information directly into an Operational Data Store, available to authorized users in Florida's healthcare ecosystem. The real-time Operational Data Store will become the foundation of analytic processing that supports the needs of the Agency and external stakeholders.

Analytic Data Stores derived from the real-time operational data will be available and organized in ways to use tools optimized to the analytic processing needs of each stakeholder business unit. Data Marts and tools will be available to analyze recipient health, provider processing, disease occurrence and treatment outcomes, fraud investigations, population health, and other types of analysis. The vision is for analytic information and processing to be done in near real-time allowing timely actions based on data driven insights.

With this solicitation, the Agency is procuring the foundational FX data stores which will support the transformation from the monolithic Medicaid system to Florida Health Care Connections (FX) Vision, creating a modular enterprise health care management solution, leveraging the FX capabilities and functions to advance the business operations of all areas of the Agency.

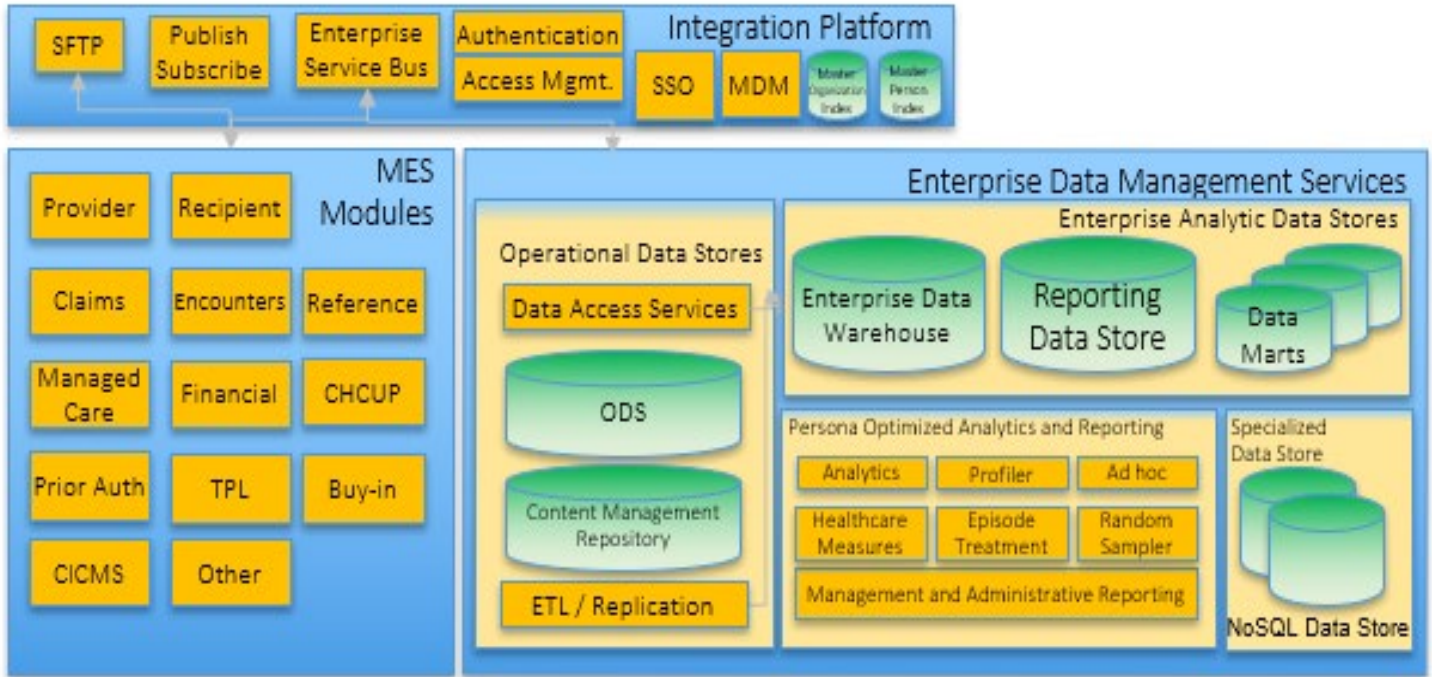
The Integration Platform will serve as the centralized communication hub and platform for the modular FX, through which all future FX modules will communicate and integrate. The Integration Services function will orchestrate and coordinate the connection to and communication paths with the FX by integrating into the Integration Platform and the EDW Solution.

The EDW Project provides a common platform for the future modules to store and access data, enabling greater information sharing, optimized data access, enhanced data integration, increased security and privacy, and strengthened query and analytics capabilities. The EDW Project includes designing, building, configuring, and implementing the Data Management Strategy for the FX. Properly implemented, the EDW Project will support all of the FX Enterprise data stores and will eliminate the need for creation, distribution, and storing of duplicate data feeds to stand-alone systems and reports, as well as enable the transformation of the State's Medicaid services.

ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

The success of the EDW Project will be achieved by taking an enterprise approach to transforming the management of FX data stores. The awarded Vendor will serve as the FX data store integrator to plan, schedule, test, and validate connection to the EDW Solution for all future Module Vendors.

Figure 5: FX Conceptual Level Diagram



The EDW System as shown in **Figure 5: FX Conceptual Level Diagram** above, as currently envisioned, is comprised of the Operational Data Store (ODS), the Enterprise Analytic Data Stores, the Persona Optimized Analytics and Reporting component, and Specialized Data Stores. The conceptual diagram requests a solution that will address the challenges presented by FX Current State. By providing a single solution for all transactional data and digital content retained by the Agency, the Operational Data Store (ODS) and Content Management Repository strives to resolve the data inconsistencies and multiple versions of “truth” present in the current state.

The Enterprise Analytic Data Store is comprised of the Reporting Data Store (RDS), the Analytic Data Store (ADS), and various Data Marts. These components will provide rapid and timely access to high quality data captured from the Operational Data Store (ODS) via well-defined replication and Extract Transform Load (ETL) processes.

The Persona Optimized Analytics and Reporting component will provide a unified set of tools intended to create consistent analytical, modeling, and reporting processes thereby increasing confidence in the reports and models produced by and for the Agency.

The Specialized Data Stores (SDS) round out the EDW Solution by providing the capability to efficiently produce data structures and data stores to meet specialized needs of the Agency, e.g. data requests from external entities such as other State agencies, academic institutions, and media outlets.

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

Together, these components form a cohesive and effective response to the Agency's need for reliable, accurate, and timely data while also addressing the need for dependable analytics and predictive modeling and forecasting.

3. Approach

The Agency is pursuing a transformative approach to become a data-centric organization. Data has always been critical to the work the Agency, health plans, providers, and external organizations perform. The Agency is changing its treatment of data as an asset to the healthcare ecosystem. Historically, data was a component embedded within a specific sub-system, focused on specific business processes. Applications and data were tightly linked, often as isolated islands specific to a business unit or business process. When the Agency replaced applications or the vendors providing processing services, the process to convert or migrate data for use in a new system was complex and difficult.

The approach the Agency is pursuing in its vision is to change the relationship between data and systems. The Agency seeks to make healthcare data a permanent asset that is managed and retained regardless of systems or organization using the data. The centralization of this important asset will provide a single source for consistent data validation and application of business policy. With this approach, the Agency expects better data quality, expanded use throughout the healthcare ecosystem, and increased innovation from stakeholders and the vendor community to improve health care for all Floridians.

The EDW vision recognizes that there are currently—and will likely be ongoing—technical and organizational boundaries requiring data be stored in multiple data stores. The Agency is implementing an Integration Services / Integration Platform (IS/IP) solution to allow information to be stored in multiple data stores in the EDW in a manner consistent with the Agency's vision. The IS/IP solution will provide near real-time connectivity to external data sources allowing redundant information to be accessed and presented in a cohesive view in near real-time. The use of integration services to assemble and consolidate data from multiple sources will help the Agency achieve some of the benefits of its vision as the operational data store grows, and duplicated data is reduced. Over time as operational data is decoupled from application systems, the expectation is the IS/IP platform will integrate fewer and fewer sources (only those external to the Operational Data Store).

Industry technology trends aligned with the EDW vision (e.g. the use of Blockchain) anticipate that eventually all stakeholders in the healthcare ecosystem will contribute and access information from a secure single source. Therefore, the EDW vision as discussed in the Data Management Strategy, contemplates that health plans, providers, and external organizations may ultimately operate from the single source of truth thus reducing internal duplication and processing delays.

4. High Level Scope

The Agency seeks qualified vendors to provide an Enterprise Data Warehouse solution that will serve as the foundational platform for the FX Enterprise, support data management strategy, improve data quality, and increase data reliability. The Agency requires an integrated, expandable, modular EDW solution that aligns with our FX Strategic Plan. Specifically:

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

a. Operational Data Store Management

- 1) Solution - provide a technology solution including infrastructure, hosting, software to meet the operational data management needs of Agency systems; provide operational data solution organized by subject area to support high volume, large data needs of the healthcare ecosystem; and provide data services to access operational data in the ODS.
- 2) Professional Services - includes initial and ongoing maintenance, upgrades and operational support of the ODS, support for future system use of ODS and ODS data services, data conversion and migration support to modernize existing systems to use ODS data services, and user training of the solution.

b. Analytic Data Management and Tools

- 1) Solution - provide a technology solution including infrastructure, hosting, and software to meet the analytic processing needs of Agency business units. Solution components include a Reporting Data Store (RDS) used for real-time dashboards and ad hoc access, an Analytic Data Store (ADS) for standard analytics, Data Marts optimized for specific business units or types of analysis, specialized Data Marts (e.g. dynamic Data Marts to address specialized analysis), and the Persona Optimized Analytics and Reporting (POAR) capabilities.
- 2) Professional Services – includes initial and ongoing maintenance, upgrades, operations and support of the RDS, ADS, Data Marts, specialized Data Marts, POAR, migration of business units to use new analytic data solutions, analytic tools, and ongoing user training of the solution.

c. Content Management

- 1) Solution - provide a technology solution including infrastructure, hosting, and software to meet the content data management needs of Agency systems, and workflow solutions to support content ingestion processes.
- 2) Professional Services - includes operation of the enterprise content management solution, redaction processes, migration or consolidation of content in redundant content management solutions and user training of the solution.

d. Data Management / Organizational Transformation

- 1) Solution - provide a technology solution to enable managing change and evolution of the data assets of the EDW Solution and tools to enable systems and stakeholders to use the EDW Solution.
- 2) Professional Services - includes the evolution of the Data Stores as new data types and sources are integrated to the EDW Solution, consolidation of system specific Data Stores into the EDW Solution and user training of the solution.

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

5. Anticipated Implementation Approach

The Agency recognizes that implementing the modernizations to achieve the Agency's mission through "A healthcare system that empowers consumers, that rewards personal responsibility and where patients, providers, and payers work for better outcomes at the best price," involves considerable complexity, coordination, and communication. Implementing the Agency's vision will need the best thinking, highest quality delivery of services, and persistent focus on improving healthcare outcomes. The Agency seeks the best solution and services of the vendor community and is open to recommendations for implementation.

a. Initial Implementation

As part of the initial implementation, the Agency's approach is to implement the following solutions and services:

- 1) Operational Data Management
 - a) Establish a modernized operational data management platform (ODS, content management);
 - b) Develop and implement the physical data models for the ODS
 - c) Convert and migrate legacy FMMIS data to the ODS;
 - d) Setup real-time bi-directional replication between FMMIS and the ODS;
 - e) Develop data services to access the ODS;
 - f) Implement automated data redaction processes; and
 - g) Develop data services to access the Content Management.
- 2) Analytic Data Management
 - a) Establish a modernized analytic data platform
 - (1) Reporting Data Store that contains data from the ODS;
 - (2) Analytic Data Store that contains data from the ODS; and
 - b) Develop and implement the physical data models for the RDS and ADS;
 - c) Develop Extract Transform Load (ETL) processes;
 - d) Implement the requirements listed under Attachment B Scope of Services, Sections B.3.B., Business Outcome Requirements, B.3.C., Business Requirements and B.3.D., User Requirements; and
 - e) Support business units on operational reporting and develop executive dashboards.
- 3) Data Management Organizational Transformation
 - a) Data Management driven organizational changes; and

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

- b) Integrate with the Data Governance processes within the FX Ecosystem.

b. Task Order Implementation

As part of the task order implementation, the Agency's approach is to implement the following solutions and services:

- 1) Operational Data Management
 - a) Migrate existing Agency systems data to the ODS and use data services to access the ODS; and
 - b) Migrate external systems data to the ODS and use data services to access the ODS; and
 - c) Implement content federation or content store consolidation at the Agency level.
- 2) Analytic Data Management
 - a) Migrate business units to the modernized analytic data platform in phased implementations. Phases are prioritized by business value.
 - b) Support business units on operational reporting and develop executive dashboards.
- 3) Data Management Organizational Transformation
 - a) Data Management driven organizational changes; and
 - b) Modernized Data Governance processes within the FX Ecosystem.

C. EDW Procurement Library

The [EDW Procurement Library](http://ahca.myflorida.com/procurements/index.shtml) and the corresponding EDW Reference Guide are located at <http://ahca.myflorida.com/procurements/index.shtml>, and provide important information regarding guidelines and standards related to the FX enterprise transformation. These documents provide essential information needed for this Contract. These documents may be updated, and new documents may be added throughout the FX Project work to reflect the most current information and management processes as the FX Projects progress. A list of these documents, the file names, and a short description for each document can be found in **EDW Reference Guide** located in the [EDW Procurement Library](#).

Vendors are encouraged to review the FX Project documents located in the [EDW Procurement Library](#), and will be expected to adhere to and follow all standards, including updates and new documents, for the entirety of this Contract.

D. Roles and Responsibilities (Summary)

Many organizations and vendors have different roles and responsibilities implementing and supporting the FX enterprise transformation. This section summarizes major responsibilities of each organization.

1. Agency FX Team

The Agency is responsible for the administration of the Florida Medicaid Program, communication with Legislature, CMS and FX Stakeholders, licensure and regulation of Florida's health facilities, accurate financial management and reporting, and for providing information to Floridians about the quality of care they

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

receive. Specifically, for this project, the Agency is responsible for contract management and oversight of all the FX Vendors.

2. Centers for Medicare and Medicaid Services (CMS)

CMS is the Federal Agency responsible for the review and approval of the new FX planning and solicitation documents, release of enhanced Federal Financial Participation, and the Certification of new modules or components of the FX.

3. Strategic Enterprise and Advisory Services (SEAS) Vendor

The SEAS Vendor is responsible for serving as the Agency's strategic, technical, and programmatic advisor and facilitate the implementation of the FX Portfolio. From a project life cycle perspective, for a new module, the SEAS Vendor initiates, plans, and develops procurement-level requirements for the multiple FX Projects, as well as operates the Enterprise Project Management Office (EPMO).

4. Independent Verification & Validation (IV&V)

The IV&V Vendor is responsible for providing a rigorous independent process which evaluates the correctness and quality of the FX Portfolio business products to verify they are being developed in accordance with Agency and CMS requirements and are well-engineered. The IV&V Vendor reports its findings directly to the Agency's IV&V Contract Manager, the Florida's Agency for State Technology (AST), and CMS.

5. Integration Service and Integration Platform (IS/IP) Vendor

The Integration Services and Integration Platform (IS/IP) Vendor is responsible for providing technical expertise to enable and confirm interoperability of FX modules. The IS/IP Vendor shall collaborate and cooperate with the FX Project Team, EDW Vendor and Module Vendors as well as FX stakeholders. The IS/IP Vendor shall design, develop, implement, and operate the Integration Platform and provide ongoing support and services to assist the Agency and the future Module Vendors in connecting and communicating with the Integration Platform.

6. Enterprise Data Warehouse (EDW) Vendor

The Enterprise Data Warehouse (EDW) Vendor is responsible for designing, developing, implementing, and operating the EDW Solution and providing ongoing support and services to assist the Agency and the Module Vendors in connecting and communicating with the EDW. The EDW Vendor shall coordinate with the IS/IP Vendor and Module Vendors. The EDW Vendor shall support all IV&V activities and requests as directed by the Agency for the duration of this Contract.

7. FX Module Vendors

The FX Module Vendors provide best-in-class modular Medicaid solutions. The FX Project Vendors shall coordinate with the EDW Vendor and IS/IP Vendor to integrate and test the end-to-end FX functionality. FX Project Vendors are responsible for their modular components and connecting to the Integration Platform and EDW Solution. FX Project Vendors shall use the Integration Services and Integration Platform (IS/IP) and EDW Solution for communicating with other FX modules.

8. Governance

The FX enterprise transformation is highly complex due to the potential volume of decisions, approvals, and issues which may need resolution. The challenges

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

of integrating multiple vendors and projects, disruptions due to strategic realignment of the FX Portfolio, and uncertainties associated with legislative and political environments contribute to the complexity. If not managed effectively, this large transformation will struggle to meet its objectives, timelines, and budgets. To effectively manage the complexity arising out of this large transformation, a governance structure and process has been developed and is documented in the **FX Governance Plan**, located in the [EDW Procurement Library](#).

The EDW Vendor shall comply with the most current **FX Governance Plan** and adhere to the Agency's governance framework.

E. Procurement Restrictions

The Procurement Restrictions are provided in **Attachment A**, Instructions and Special Conditions Section A.1., Instructions, Sub-Section A., Overview, Item 13. Program Overview, Table 2, Procurement Restrictions.

B.2. Services Provided by the Agency, SEAS, and IS/IP Vendor

A. Agency Services

The Agency will provide services to facilitate the EDW Vendor in meeting the requirements of this Contract through a dedicated Agency Contract Manager. Services include Vendor access to the appropriate enterprise systems, Agency network, Agency-hosted document repository, provider handbooks, policies, procedures and other documentation, and project materials as deemed appropriate by the Agency to provide services under this Contract including:

- Historical and current MITA State Self-Assessment (SS-A) documentation; Agency-hosted document repository libraries;
- User and technical training in the appropriate use of FX and Agency IT Systems, if needed;
- Clarification and interpretation of the terms and conditions of this Contract, policies and procedures and provider handbooks as needed;
- Access to Agency participants, stakeholders, business process owners; monitor and enforce Vendor compliance with Contract requirements and Scope of Services; and
- Timely review and approval of deliverables and relevant documents submitted by the Vendor.

B. Services Provided by SEAS Vendor

The SEAS Vendor serves as an advisor and partner to the Agency and provides ongoing strategic, governance, technical, programmatic advisory services, investment estimates, and funding requests to develop the FX Projects, FX Portfolio, and FX Scope. The SEAS Vendor also provides services to facilitate Vendors in meeting the requirements of their Contract, including: enterprise project management services; programmatic advisory services; MITA assessment and planning; initiation of FX Projects; assessment of Vendor Project Management Office (PMO) compliance; facilitate User Acceptance Testing; manage the Medicaid Enterprise Certification process and reviews; and enterprise data security management.

Develops, documents, and maintains Technical Services such as:

- Data Management Strategy;

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

- Information Architecture;
- Conceptual Data Model (CDM);
- Logical Data Model;
- Information Capability Matrix;
- Data Standards;
- Technical Management Strategy;
- Design and Implementation Management Standards and Oversight;
- Technology Standards; and
- Enterprise Data Security Plan.

C. Services Provided by the IS/IP Vendor

The Agency is procuring the services of an integration platform solution and integration platform services (IS/IP) Vendor. The IS/IP Vendor provides the following services to facilitate the EDW Vendor in meeting the requirements of this Contract.

1. Integration Platform Solution

The IS/IP Vendor designs, builds, configures, and implements the Integration Platform for the FX enterprise transformation. The IS/IP Vendor establishes Integration Platform services to enable component integrations based on the standards identified by the FX Project Management Standards, FX Technical Management Strategy, Technology Standards, Data Standards, and Enterprise Data Security Plan. This Platform enables the seamless integration of multiple modular components including Commercial-off-the-Shelf (COTS) software, Software-as-a-Service (SaaS) solutions, and additional modules.

The IS/IP Vendor performs the configuration, implementation, support, and maintenance of the Enterprise Service Bus (ESB), Master Data Management (MDM), Managed File Transfer (MFT), Business Rules Engine (BRE), and Single Sign-on (SSO) solutions. The IS/IP Vendor coordinates with the Module Vendors for the development of the architecture for integration capabilities to support FX Projects, including the data coming in through the ESB into the Operational Data Store (ODS) and eventually transformed into the Enterprise Analytic Data Store, and other modules.

The IS/IP Vendor supports the following:

- Processing accuracy (e.g. Identity Matching, MDM, ESB);
- High-speed processing at extremely large-scale volumes;
- Efficient module and external system integration and processing;
- Simplify configuration, policy, process, maintenance, and testing;
- Services versioning, reuse, and rapid deployment; and
- Protected and secure FX data and assets.

The IS/IP Vendor provides Integration Platform solution to include the following components:

- a. Enterprise Service Bus (ESB);
- b. Service Management;

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

- c. Managed File Transfer (MFT);
- d. Business Rules Engine;
- e. Security;
- f. Master Data Management (MDM);
 - 1) Master Person Index (MPI); and
 - 2) Master Organization Index (MOI).

2. Integration Services Solution

The IS/IP Vendor provides iterative professional Integration Services focused on meeting the Agency's needs for interoperability, enterprise integration, and technical coordination of module/module component implementations for the FX. The IS/IP Vendor implements the integration framework based on the standards identified by the Technology Standards, FX Data Management Strategy, FX Technical Architecture Documentation, and FX Technical Management Strategy, located in the [EDW Procurement Library](#). The IS/IP Vendor verifies the integrity and interoperability of the FX IT architecture and cohesiveness of the various modules incorporated into the FX. To support the Agency's objectives, the new Integration Services solution shall include the following:

- a. Systems Interoperability;
- b. Interface Integration; and
- c. Legacy System Transition Integration.

B.3. Services Provided by the EDW Vendor

A. Introduction to Requirements

To be successful in the overall implementation, integration, and operation of modular solutions which involves many vendors, the Agency and modular solution vendors benefit greatly from consistency in:

- Communication;
- Standards;
- Processes;
- Artifacts;
- Requirements; and
- Understanding of Responsibilities.

The FX Project Team has defined the Florida Health Care Connections (FX) Program Life Cycle (FXPLC). The FXPLC is an important FX Project asset which improves and helps achieve the consistency needed for efficient interactions among everyone involved. The FXPLC, which is closely aligned with the CMS eXpedited Life Cycle (XLC), provides standard terminology and a single source of understanding of the phases, activities, artifacts produced, applicable standards and compliance expectations, and organizational responsibilities that occur during the implementation of FX Projects.

This EDW Scope of Services is structured to articulate the requirements and expectations for the:

- Business outcome requirements;

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

- Business process requirements;
- Solution components provided by the EDW Vendor; and
- Professional services required to implement and operate the EDW Solution.

Vendor “Services” and “Technology Solutions” are presented in multiple forms. Requirements which are “FX Enterprise” span all of the FX enterprise transformation projects. FX Enterprise requirements are meant to provide standardization across the FX solicitations to keep common requirements consistent from vendor to vendor.

“Contract Wide” requirements will be specific to this solicitation. There are many Contract Wide requirements that apply to all solution components and to the professional services performed to implement and operate the EDW Vendor’s solutions. This Scope of Services is designed to group those Contract Wide requirements together to minimize duplication of content and support response completeness.

“FX Project” requirements are specific to a project within the vendor’s solution or services. The following sections describe the requirements for the solutions and services the EDW Vendor shall provide. The EDW Vendor shall provide solutions and services as one or more FX Projects. To facilitate reuse and efficient cross project communications, the FX Project Life Cycle defines standard project life cycle phase activities, project artifacts, standards, processes, and organizational responsibilities.

Additional requirements will be “Component Specific” requirements. Component Specific requirements are those requirements which are specific to a component within the vendor’s solution or services, and usually are not found in other areas of the solicitation.

The requirements described for the solution and services are organized to communicate requirements applicable to all projects, project life cycle activities, project artifacts and solution implementations for the FX Enterprise; Contract Wide, FX Projects and Component Specific requirements. The requirements in this section (**B.3**) are organized in sub-sections as follows:

- Business Outcome Requirements;
- Business Requirements;
- User Requirements;
- Solution Requirements;
- Services Requirements;
- Vendor Staffing Requirements; and
- Contract Requirements.

Section B.3.F.8. Deliverable Requirements describes the anticipated artifacts and deliverables produced by the EDW Vendor under this Contract. The full listing and details of the Deliverables are in **Section B.3.F.8.**

B. Business Outcome Requirements

Business Outcome requirements are direct changes in the results achieved or costs the Agency incurs to deliver healthcare and Medicaid services.

1. Mandatory Business Outcomes

The following business outcomes requirements are mandatory for the EDW Vendor’s Solution and Services:

ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

The Vendor shall propose any commitments to achieve specific business outcomes that result in improved delivery of healthcare services or cost. Any agreed upon and accepted commitments will be documented during negotiations as part of the best and final offer.

2. Targeted Business Outcomes

The EDW Vendor's Solution and Services shall enable the Agency to achieve the desirable business outcomes.

Examples of targeted outcomes include:

- Eliminate costs of collecting and securing duplicate data;
- Reduce complexity;
- Reduce manual processes;
- Facilitate a holistic evidence-based decision-making process;
- Reduce payment errors using prepayment analysis; and
- Eliminate cost of duplicate analysis performed by different stakeholders.

3. MITA Maturity Outcomes

It is expected that the EDW Vendor's Solution and Services shall help the Agency to achieve higher MITA Maturity Levels (current Maturity Levels can be found in the 2018 State Self Assessment (SS-A) document, located in the [EDW Procurement Library](#)):

The Vendor shall describe its solutions and propose any commitments to achieve higher MITA Maturity levels. Any agreed upon and accepted commitments will be documented during negotiations as part of the best and final offer.

C. Business Requirements

Business requirements are general statements describing what the stakeholders must do to fulfill the Agency's State and Federal mandates, business objectives, and strategic objectives. The business requirements provide the business context and functionality expectations for the solutions and services provided by the EDW Vendor.

1. Component Specific Business Requirements

The EDW Vendor shall provide a solution to meet the following business requirements of the Agency.

Table: 1 - Component Specific Business Requirements below, summarizes the Component Specific Business Requirements for this Scope of Services.

Table: 1 - Component Specific Business Requirements	
Req ID	Requirement
BR-001	The Vendor's solution shall provide data management, business intelligence, and analytic capabilities to support the management of FX Projects and FX data.
BR-002	The Vendor's solution shall provide reporting and analytic tools that support the Agency's Strategic Objectives.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 1 - Component Specific Business Requirements	
Req ID	Requirement
BR-003	The Vendor's solution shall provide reporting and analytic tools that support the Agency's operational, policy, and regulatory decisions.
BR-004	The Vendor's solution shall provide timely data management, business intelligence, reporting, and analytic information to support FX Portfolio business processes (e.g. real-time, near real-time, daily, weekly, monthly, quarterly, and annually).
BR-005	The Vendor's solution shall provide current and historical Claims, Recipient, Provider, and other supporting tools and data to management for fiscal planning and control.
BR-006	The Vendor's solution shall retain and make available all data necessary to support the financial activities of the Agency.
BR-007	The Vendor's solution shall support data storage and retrieval requirements for all Agency, State and Federal Reporting, and Audit requirements.
BR-008	The Vendor's solution shall provide an audit trail of all inquiry, insert, update, and delete transactions performed on any data retained by the solution. Audit records shall capture the responsible user or process, date and time of change, the status of the record, and "before" and "after" snapshots of the affected record.
BR-009	The Vendor's solution shall provide an audit trail for all query transactions, including read only access of Protected Health Information (PHI) or protected fields that identify the responsible user or process, date and time of change, and the status of the record.
BR-010	The Vendor's solution shall support the storage of all data types listed in the FX SEAS Data Types document, located in the EDW Procurement Library .
BR-011	The Vendor's solution shall support the storage of and provide business intelligence and a data analytic processing platform for all data types listed in the FX SEAS Data Types document, located in the EDW Procurement Library .
BR-012	The Vendor shall design, develop, and implement a solution for Public Records requests; the solution shall provide redaction capabilities, and shall support the provision of accurate responses within the timeframes mandated for Public Records requests by Federal, State, and Agency laws and policies.
BR-013	The Vendor shall not use any proprietary services, protocols, or file structures without the written prior approval of the Agency.

2. Reporting Requirements

The EDW Vendor shall provide a solution to support Agency business unit responsibilities and requirements to produce and provide stakeholders with information using data stored by the Agency.

Table: 2 - Reporting Requirements below, summarizes the Reporting requirements for the EDW Project.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 2 - Reporting Requirements	
Req ID	Requirement
BR-014	The Vendor shall provide a reporting solution that meets multiple business needs across the entire Agency. The reporting solution shall comply with all Federal and State reporting requirements and provide an array of reporting and analytic tools.
BR-015	The Vendor shall implement a reporting solution (reports and tools) that include: <ul style="list-style-type: none"> • Dashboards; • Ad hoc queries; • Pre-defined reports (Static and Parameterized); • Data mining; • Data extracts to other tools; and • Other reports as directed by the Agency.
BR-016	The Vendor supplied dashboards and reports shall comply with Agency standards for look and template design.
BR-017	The Vendor shall update dashboard and report templates as requested by the Agency.
BR-018	The Vendor shall implement a reporting solution (reports and tools) to include the ability to conduct: <ul style="list-style-type: none"> • Descriptive analysis; • Diagnostic analysis; • Predictive analysis; and • Prescriptive analysis.
BR-019	The Vendor shall implement a reporting solution (reports and tools) capable of conducting the following analysis: <ul style="list-style-type: none"> • Behavioral; • Geospatial; • Statistical; • Data Visualization; • Actuarial; • Fraud and Abuse; • Natural Language; • Survey; • Population Health; • Socio Cultural; • Longitudinal; and • Image Data.
BR-020	The Vendor's solution shall automate the production (where possible) of the latest version of Federally required reports including: <ul style="list-style-type: none"> • CMS 21 (Children's Health Insurance Program (CHIP) Expenditures); • CMS 21B (CHIP Budget); • CMS 37 (Medicaid Program Budget); • CMS 64 (Quarterly Medicaid Expenditures); • CMS 372 (Annual Waiver Report); • CMS 372 S (Annual Home and Community-Based Services "HCBS" Waiver Report); • CMS 416 (Annual Early, Periodic, Screening, Diagnostic, Treatment (EPSDT) Report); • CMS Annual Hospice Report;

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 2 - Reporting Requirements	
Req ID	Requirement
	<ul style="list-style-type: none"> • CMS Disproportionate Share (DSH); • CMS Drug Utilization Review Annual Report; • Transformed Medicaid Statistical Information System (T-MSIS); • Other reports identified by the Agency.
BR-021	The Vendor's solution shall facilitate data analysis needs or produce reports required by Florida Statute for the Agency to submit which include: <ul style="list-style-type: none"> • Emergency Department visits; • Expenditures; • My Florida Rx; • Prescribed Drug Services Spending Control Initiative; and • Other reports identified by the Agency.
BR-022	The Vendor's solution shall support all functionality required to comply with Federal Management and Administrative Reporting System (MARS) requirements.
BR-023	The Vendor's solution shall provide tools and reports that meet or exceed all Federal Surveillance and Utilization Review System (SURS) standards for compliance.

3. Business Unit Specific Requirements

The EDW Vendor shall provide a solution that meets the specific requirements for individual business units within the Agency.

Table: 3 - Business Unit Specific Requirements below, summarizes the Business Unit Requirements for the EDW Solution.

Table: 3 - Business Unit Specific Requirements	
Req ID	Business Unit
BR-024	The Vendor's solution shall provide Data Stores that are optimized to the data needs of the Agency.
BR-025	The Vendor's solution shall have the functionality to combine data on multiple dimensions to reveal proximity in two or more dimensions.
BR-026	The Vendor's solution shall have the functionality for authorized users to select data from a large dataset and enrich the data by creating calculated fields and combining the data with additional datasets.
BR-027	The Vendor's solution shall have the functionality for authorized users to create models using advanced analytic tools like SAS®, SPSS®, R, etc.
BR-028	The Vendor's solution shall have the functionality for authorized users to analyze data from multiple data sources both within and outside the Agency to merge for analysis.
BR-029	The Vendor's solution shall have the functionality to produce reports of varying levels of detail that support drill-down capabilities, multiple cross-tabulations (e.g. by demographics, geography, and health plan), sub setting, modeling, and forecasting.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 3 - Business Unit Specific Requirements	
Req ID	Business Unit
BR-030	The Vendor's solution shall retain all data necessary to calculate rate-based reimbursement (e.g. hospitals, institutional, and health plan capitation, etc.).
BR-031	The Vendor's solution shall provide an unduplicated count of recipients and providers by defined groups, demographics, regions, and other criteria.
BR-032	The Vendor's solution shall provide the ability to forecast future recipient enrollment based on historical trends, population growth, programmatic changes, and proposed legislation.
BR-033	The Vendor's solution shall provide the ability to analyze historical data using defined parameters to project future enrollment (e.g. Medicaid, Health Plan, Provider, etc.).
BR-034	The Vendor's solution shall provide the ability to analyze historical data using defined parameters to project future expenditures.
BR-035	The Vendor's solution shall provide the ability to analyze historical data using defined parameters to project future utilization of healthcare services by recipients.
BR-036	The Vendor's solution shall provide the ability to analyze historical data using defined parameters to project future health outcomes expected.
BR-037	The Vendor's solution shall provide the ability to report expenditures by defined groups, demographics, regions, and other criteria.
BR-038	The Vendor's solution shall provide monitoring of compliance and performance benchmarks in health plans' contracts.
BR-039	The Vendor's solution shall provide the review, comparison, and evaluation of care management processes to support quality improvement strategies.
BR-040	The system shall provide evaluation of Health Care Effectiveness Data and Information Set (HEDIS) and other performance metrics derived by health plans and regions.
BR-041	The Vendor's solution shall manage, store, provide, and support processes related to claims and encounter data from providers and health plans.
BR-042	The Vendor's solution shall provide the analysis of financial reports (quarterly and annually) from health plans regarding solvency, medical loss ratios, utilization ratios, and company health.
BR-043	The Vendor's solution shall be able to report on health plan financial reporting by plan, region, and statewide.
BR-044	The Vendor's solution shall meet the data management, analytic, and reporting capabilities that support the reporting and analysis of current Agency cash flow.
BR-045	The Vendor's solution shall meet the data management, analytic, and reporting capabilities that support tracking, reporting, and analysis of accounts receivables established, active, closed, and settled.
BR-046	The Vendor's solution shall meet the data management, analytic, and reporting capabilities that support tracking and analysis of Federal funds needed (Day and Week) to fund Medicaid and CHIP claim and contract payments.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 3 - Business Unit Specific Requirements	
Req ID	Business Unit
BR-047	The Vendor's solution shall meet the data management, analytic, and reporting capabilities that support the payment process for all State and Federal provider expenditures (e.g. Disproportionate Share Hospitals, the Low-Income Pool, and the Graduate Medical Education Residency program).
BR-048	The Vendor's solution shall meet the data management, analytic, and reporting capabilities that support the ability to analyze and assess the service delivery system of providers and facilities (long-term care, hospitals, pharmacies, etc.) in a geographic location measured in terms of access and need.
BR-049	The Vendor's solution shall capture, categorize and report on all licensed facilities (e.g. nursing homes, assisted living, ICF-IID, lab, out-patient, pharmacy, 340B providers, etc.).
BR-050	The Vendor's solution shall identify the license and survey status for all licensed facilities (e.g. nursing homes, assisted living, ICF-IID, lab, out-patient, pharmacy, 340B providers, etc.).
BR-051	The Vendor's solution shall support investigations by providing defined algorithm and pattern recognition capability that identifies anomalous and outlier data to profile provider and recipient fraud and abuse.
BR-052	The Vendor's solution shall create machine learning based solutions for the Agency in the areas of predictive analytics, artificial intelligence, fraud detection, and fraud prevention.
BR-053	The Vendor's solution shall integrate with the Enterprise identity linking solution provided by the IS/IP Vendor Enterprise Master Person Index (MPI) and Master Organization Index (MOI). The Vendor's solution shall provide and support analysis and reporting reflecting records of organizations and persons that have the same identity.

D. User Requirements

The EDW Vendor shall provide a solution that meets the following functional and non-functional requirements that relate to specific users or user categories.

1. Stakeholder Requirements

The EDW Vendor shall provide a solution that meets the data management, business intelligence, and analytic capabilities that support the data sharing needs of Agency Stakeholders.

Table: 4 - Stakeholder Requirements below, summarizes the Stakeholder Requirements for the EDW Solution.

Table: 4 - Stakeholder Requirements	
Req ID	Requirement
UR-001	The Vendor's solution shall facilitate the data needs (real-time, near real-time, current, and historical) for future FX modules implemented by other vendors.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 4 - Stakeholder Requirements	
Req ID	Requirement
UR-002	The Vendor's solution shall provide data management, business intelligence and analytic capabilities to support the data needs of the Agency with other State Agencies that support Medicaid.
UR-003	The Vendor's solution shall provide data management, business intelligence, and analytic capabilities to support the data needs of the Agency with CMS and other Federal Agencies.
UR-004	The Vendor's solution shall provide data management, business intelligence, and analytic capabilities to support the data needs of the Agency with other identified State Agencies.
UR-005	The Vendor's solution shall provide data management, business intelligence, and analytic capabilities to support the data needs of the Agency with identified organizations and partners (e.g. county organizations, non-profits, health plans, hospitals, provider and recipient organizations, academic institutions).
UR-006	The Vendor's solution shall support the data needs for third party data analytic service providers contracted with the Agency.

2. Persona Type Specific Requirements

The EDW Vendor shall provide a solution that delivers role-based personas based on the business need of individual end users. The solution will provide reporting and analytic capabilities based on the assigned user persona.

Table: 5 - Persona Type Requirements below, summarizes the Persona Requirements for the EDW Solution.

Table: 5 - Persona Type Requirements	
Req ID	Requirement
UR-007	The Vendor's solution shall provide use of one or more user specific personas based on the end user's needs.
UR-008	The Vendor's solution shall provide the user persona for Data Viewer - Views predefined reports which are delivered to the user based on their job function.
UR-009	The Vendor's solution shall provide the user persona for Data Selector - Selects specific reports from a predefined catalog of reports. Primarily seeks discrete numbers, pieces of information, and insights pertaining to their job function.
UR-010	The Vendor's solution shall provide the user persona for Data Retriever - Starts with a predefined dashboard, typically accessing and analyzing data to produce alternate views; often goes through several iterations of selecting data facts, filtering and sub setting data before finding the insight the user needs.
UR-011	The Vendor's solution shall provide the user persona for Analyst - Begins by selecting the data the user needs, typically from a larger dataset and then enriching the data by creating calculated fields and possibly combining the data with additional datasets; often will create comparisons between data and evaluate trends across time.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 5 - Persona Type Requirements	
Req ID	Requirement
UR-012	The Vendor's solution shall provide the user persona for Advanced Analyst - Creates models for the Agency using advanced analytic tools like SAS, SPSS or R. Pulls data from multiple data sources both within the Agency and outside the Agency; merges varied data sources together for analysis.
UR-013	The Vendor's solution shall provide the user persona for Data Scientist - Creates machine learning based solutions for the Agency in the areas of predictive analytics, artificial intelligence, fraud detection and fraud prevention.

E. Technology Solution Requirements

This section describes the requirements for EDW Solution components to be implemented by the EDW Vendor. Solution components are tangible software, hardware infrastructure, data, content, and products provided for use in the FX Portfolio by systems and users.

1. FX Enterprise Requirements

This section contains requirements that are applicable to all future FX solution components implemented for all FX Projects. The FX Enterprise Requirements are based on the documented technical standards for FX Projects. They include: **FX Project Management Standards; FX Technical Management Strategy; Technology Standards; Data Standards; and Data Security Plan**, located in the [EDW Procurement Library](#). Further elaboration or exceptions specific to a solution area or specific solution component are contained in the sections that follow.

a. FX Technology Standards and Compliance

The Vendor shall adhere to the current and future Agency technology standards as documented in **Technology Standards** which is located in the [EDW Procurement Library](#). The technology standards establish and populate a framework for a common technology vocabulary and communication of relevant and applicable standards for technology components. The Technology Standards Reference Model (TSRM) is the common technology vocabulary which organizes, and groups related technology components' standardizing the names and descriptions of those components. The Technology Standards Reference Guide (TSRG) is a repository of technology component standards which identifies and prioritizes specific technology standards for FX Projects.

The Vendor is expected to be familiar with the Agency's Information Technology (IT) environment. All services and products provided as a result of this solicitation shall comply with all applicable Agency's IT policies, including and not limited to, compliance requirements summarized in **Table: 6 - Standards and Compliance Requirements** below. If the Vendor cannot comply with any applicable compliance requirement, they must request an exception. It will be the responsibility of the Agency to deny the exception request or to approve the compliance requirements exception.

The Vendor shall submit an annual report to the Agency that includes an evaluation of industry best practices and identification of current available innovations within the data warehouse industry. Identified innovations will

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

include creative, cost-effective solutions that could benefit the Agency. The Vendor shall research and analyze innovations initiated by other FX-related vendors in order to articulate positive and negative impacts to the EDW. Innovations shall be implemented at the Agency's discretion. FX Vendors will be required to collaborate on any such innovations with each other, the SEAS Vendor, and the Agency for the benefit of the FX program.

Table: 6 - Standards and Compliance Requirements	
Req ID	Requirement
CR-001	The Vendor's solution shall include full integration of the MITA framework with business, architecture, and data required to support the Agency's healthcare programs.
CR-002	The Vendor shall comply with all sections of the Americans with Disabilities Act (ADA), Section 508 of the Rehabilitation Act and adhere to user interface standards.
CR-003	The Vendor shall adhere to recognized best practices during the execution of this Contract including the most recent version of the National Institute of Standards and Technology (NIST) Special Publication (SP) 800 series.
CR-004	The Vendor shall be knowledgeable of and support the Agency to maintain compliance with the "to be" vision of MITA 3.0 Standards and Conditions-MITA Condition or the latest MITA version which requires states to align to and advance in MITA maturity for business, architecture, and data.
CR-005	The Vendor's data management strategy and operational policies shall comply with Health Insurance Portability and Accountability Act (HIPAA), Health Information Technology for Economic and Clinical Health (HITECH), and American Recovery and Reinvestment Act of 2009 (ARRA) standards.
CR-006	The Vendor's solution shall be compatible with multiple standard browsers in accordance to the standards stated in the Technology Standards Reference Guide .
CR-007	The Vendor shall verify all technologies implemented are in compliance with any End User Licensing Agreements or other licensing arrangements.
CR-008	The Vendor shall comply with all sections in 42 CFR 433.112(b), and Florida Administrative Code Rules; Chapter 74-1 Information Technology Security, Chapter 74-1 Project Management and Oversight and Chapter 74-5 Identity Management.
CR-009	The Vendor shall not use any proprietary services, protocols, or file structures without the written prior approval of the Agency. The Vendor shall document and notify the Agency if a Module Vendor proposes or uses a proprietary interface and protocol.

b. Hosting and Environments

Table: 7 - Hosting and Environments Requirements below, summarizes the Hosting and Environments requirements for the EDW Project.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 7 - Hosting and Environments Requirements	
Req ID	Requirement
CR-010	The Vendor shall provide hosting services which meet the Agency requirements and support the solution. The Vendor's solution shall include the ability to migrate to a cloud environment.
CR-011	The Vendor shall comply with all quality, performance standards, availability, capacity, security, and all other requirements established and defined in cooperation with the FX Project Team.
CR-012	The Vendor's hosting solution shall comply with all Federal, State, and Agency mandated Data Residency Laws and Policies.
CR-013	The Vendor shall provide a Hardware and Equipment Acquisition and Installation Plan for the proposed solution as outlined in PD-6: Bill of Materials (BOM) .
CR-014	The Vendor shall provide a Software Acquisition and Installation Plan for the proposed solution as outlined in PD-6: Bill of Materials (BOM) .
CR-015	The Vendor shall be responsible for procuring, operating, and maintaining any hardware, software or services needed to support all components and project tools used by the Vendor. Any licenses purchased by the Vendor shall be transferred, if applicable, to the Agency.
CR-016	The Vendor shall purchase and maintain infrastructure hardware and software including upgrades and technology refreshes to maintain up-to-date functionality of the solution, at no additional cost to the Agency.
CR-017	The Vendor shall, in coordination with the FX Project Team, develop and maintain a Capacity Management Plan which shall account for the reasonable growth of performance demands based on historical and projected growth rates.
CR-018	The Vendor's hosting solution shall provide the flexibility to integrate other solutions for security and regulatory purposes in the future, with built-in burst capacity to handle burst periods or potential growth.
CR-019	The Vendor shall provide the Agency with results of the Data Conversion and Migration. The results will include record counts, document counts and rejected data due to discrepancies. The Vendor shall provide reports daily or as otherwise specified by the Agency, documenting any data discrepancies and the resolution plan for each discrepancy. The Vendor shall include the requirement for the production of these reports in the Data Conversion and Migration Plan (PD-10).
CR-020	The Vendor's solution shall be available and accessible twenty-four (24) hours a day, seven (7) days a week, with the exception of planned downtime due to system upgrades or routine maintenance. All planned downtime and maintenance outages shall be coordinated and approved by the Agency at least five (5) business days in advance and occur after 10:00 PM, ET and before 6:00 AM, ET, unless a different time is approved by the Agency. Agency staff shall be notified by e-mail twelve (12) hours prior to any scheduled maintenance.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 7 - Hosting and Environments Requirements	
Req ID	Requirement
CR-021	The Vendor shall provide a solution implementing procedures, technologies, and capabilities that support non-disruptive configuration changes.
CR-022	The Vendor shall provide a set of monitoring tools for use by the Agency and Agency-designated contract staff in the support and maintenance of all testing, development and production environments.
CR-023	The Vendor shall provide a solution that provides detailed alerts and logging of all service failures and exceptions.
CR-024	The Vendor shall identify and describe the licenses necessary for the scope of work to support the solution. The solution shall provide sufficient bandwidth and redundancy to validate maximum accessibility, reliability/fault tolerance and acceptable performance.
CR-025	The Vendor shall deliver a solution with necessary and sufficient scalability to process and retain all required transactions based on project Agency volumetric data growth. Transaction being defined as the set of all operations executed within the solution.
CR-026	The Vendor shall maintain physical access credentials and controls (e.g. employee badge and security video) for all staff having access to system, data, and processing location(s). The Vendor shall designate one or more persons responsible for the security of each Vendor facility.
CR-027	The Vendor shall provide Internet security functionality at a minimum to include, the use of firewalls, intrusion detection/intrusion prevention (IDS/IPS), https, encrypted network/secure socket layer (SSL), and security provisioning protocols, such as secure sockets layer, and Internet protocol security (IPSEC) according to the applicable Federal Information Processing Standards (FIPS) and National Institute of Standards and Technology (NIST) standards.
CR-028	The Vendor's Computer Resource Center (CRC) shall be housed in a secure area, protected by a defined security perimeter, with appropriate security barriers and entry controls to regulate physical access to the CRC; record and control access by visitors, and regularly review and update access rights to the CRC.
CR-029	The Vendor shall provide to the Agency a monthly written summary of the identification, investigation, and resolution of all privacy and security incidents, and email notification within one (1) hour of discovery of any security breach. Identification, investigation, and resolution procedures shall be approved by the Agency as part of the Vendor's HIPAA compliance procedures.
CR-030	The Vendor shall protect all power and telecommunications cabling carrying information or supporting information services related to the solution from interception or damage. The Vendor shall document what existing power and cabling is covered by this standard and communicate to the Agency's management for appropriate protective action.
CR-031	The Vendor shall retain the user inquiry activity audit log data as directed by the Agency and provide the user activity audit log to authorized Agency staff within twenty-four (24) hours of receipt of request from the Agency.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 7 - Hosting and Environments Requirements	
Req ID	Requirement
CR-032	The Vendor shall provide the capability to run multiple environments simultaneously to support the testing efforts as required by the Agency. This includes providing sufficient environments and configurations (e.g. multiple environments, multiple application layers, hub architecture) necessary to perform all required functions (e.g. testing, training, production operations, modeling, business continuity, disaster recovery).
CR-033	The Vendor shall provision environments as requested by the Agency and submit an Environmental Readiness Review which details the scope of work, planned tasks, and completed tasks as part of the configure and build process for the solution including implementation of detailed requirements, detailed design, configuration, development, unit testing, and documentation.
CR-034	The Vendor shall use the PD-16: Environmental Readiness Review to evaluate and recommend to the Agency to make a Go or No-Go recommendation. The Vendor shall develop, preapproved by the Agency, standard measures and results to establish to evaluate environmental readiness.

c. Disaster Recovery and Business Continuity

Table: 8 - Disaster Recovery and Business Continuity Requirements below, summarizes the Disaster Recovery and Business Continuity requirements for the EDW Project.

The Contingency Plan for Disaster Recovery and Business Continuity has been outlined in the **FX Technical Management Strategy** and is located in the [EDW Procurement Library](#).

Table: 8 - Disaster Recovery and Business Continuity Requirements	
Req ID	Requirement
CR-035	The Vendor shall develop, maintain, and test a Contingency Plan (for Disaster Recovery and Business Continuity) for the EDW Solution in accordance with the FX Technical Management Strategy and FX Design and Implementation Management Standards , to minimize downtime and disruption of services. Optionally, if requested by the Agency, the Vendor may be the prime, coordinating vendor for FX or Agency Disaster Recovery / Business Continuity (DR/BC) activities.
CR-036	The Vendor shall provide PD-13: Contingency Plan (for Disaster Recovery and Business Continuity) for the EDW Solution that details: <ul style="list-style-type: none"> • Roles and responsibilities; • Critical stakeholder communication; • Check point/restart capabilities; • Uninterruptible power supply; • Retention and storage of back-up files and software; • Solution for continuous vendor and Agency communications; • Recovery Time Objective (RTO); • Recovery Point Objective (RPO);

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 8 - Disaster Recovery and Business Continuity Requirements	
Req ID	Requirement
	<ul style="list-style-type: none"> • Back-up procedures, hot sites, redundancy, and support to prevent and accommodate the disruption of systems and communications. These procedures shall specify any alternate location(s) in the event critical functions are impacted; and • Annual Disaster Recovery and Business Continuity Demonstration and Annual Test of the Contingency Plan.
CR-037	As part of Contingency Plan , the Vendor shall establish, in cooperation with the Agency, a Business Impact Assessment with a hierarchy of critical services and infrastructure to determine the order that services shall be restored.
CR-038	The Agency reserves the right to direct the Vendor to amend or update its Contingency Plan in accordance with the best interests of the Agency and at no additional cost to the Agency .
CR-039	The Vendor shall modify the Contingency Plan , software installation procedures, and operational procedures as needed to reflect the changes implemented with data sources, system changes, the implementation of FX modules, or any enhancements which will impact the DR/BC capability.
CR-040	The Vendor must keep the Contingency Plan in sync with the IS/IP Vendor and new module vendors and other applicable Agency IT system's Disaster Recovery and Business Continuity Plan.
CR-041	The Vendor shall maintain the Contingency Plan in a secure, online repository, as agreed to by the Agency, and in hard copy.
CR-042	The Vendor shall limit service interruption to a period of twenty-four (24) clock hours or as stated in this Contract and shall comply with all requirements under this Contract.
CR-043	The Vendor shall, in the event of a natural or man-made disaster, protect all data/files in an off-site location. Backup, disaster recovery and facility assessment will be performed at sites specified in the Contingency Plan . The Vendor shall provide an alternate business site if the primary business site becomes unsafe or inoperable.
CR-044	The Vendor shall provide work space for the Agency's DR/BC staff at the Vendor's DR/BC site, as needed, to support successful continuous operations when activating the Contingency Plan .
CR-045	The Vendor shall maintain all solution-related backups in a manner that shall reduce disruption of service or loss of data due to system or program failures or destruction.
CR-046	The Vendor shall support the Contingency Plan activities which provide immediate failover and create policies and procedures to implement recovery of all business services.
CR-047	The Vendor shall comply with all Performance Standards, as referenced in Attachment B, Exhibit B-1: Deliverables and Performance Standards relevant to Disaster Recovery and Business Continuity Requirements.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 8 - Disaster Recovery and Business Continuity Requirements	
Req ID	Requirement
CR-048	In the course of replicating, storing, transmitting, maintaining and restoring any and all enterprise data and software, the Vendor shall encrypt and secure all data used for DR/BC at rest and in transit.
CR-049	The Vendor shall maintain backups of all software tools, software configurations, scripts, documentation, and logs used in the operation of the EDW Solution and the Contingency Plan .
CR-050	The Vendor shall conduct an annual test of the Contingency Plan in a parallel environment and in coordination with the IS/IP Vendor and new module vendors and other applicable Agency IT systems, which will be observed by the Agency. The Vendor shall submit a Disaster Recovery and Business Continuity Plan Execution Report that includes the outcome, corrective action plan, and revisions, if any, to the Agency. The Agency reserves the right to participate in the annual test.
CR-051	The Vendor shall comply with the same security safeguards to protect data within the EDW Solution during emergency operations as during normal business operations.

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ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

d. Performance Standards

Table: 9 - Performance Standards below, summarizes the Performance Standards Requirements as referenced in **Attachment B - Exhibit B-1: Deliverables and Performance Standards** for the EDW Project.

Table: 9 - Performance Standards	
Req ID	Requirement
CR-052	The Vendor's EDW Solution shall meet all State and Federal regulations regarding standards for privacy, security, and individually identifiable health information including data breaches and unauthorized access. The Vendor shall implement, maintain, and operate all the solution systems in full compliance with HIPAA.
CR-053	The Vendor shall perform and complete System, Security, and Performance testing according to the PD-15: Test Plan within the timelines of the Agency approved PD-2: Project Schedule .
CR-054	The Vendor shall maintain the agreed upon staffing levels to properly complete and support the services specified in this Contract.
CR-055	The EDW Solution provided by the Vendor shall be available 99.982% of the time for every component of the solution, twenty-four (24) hours a day, seven (7) days a week, excluding Agency approved planned downtime in alignment with Tier III Data Center Standards.
CR-056	The Vendor's Data Replication solution as described in Table: 14 shall replicate all required data from source to target with one-hundred percent (100%) accuracy.
CR-057	The Vendor's Data Replication solution shall replicate all required data from source to target with each transaction being completed within sixty (60) seconds of the origination of the source transaction.
CR-058	The Vendor's EDW Reporting Data Store solution shall provide: real time source data availability within five (5) minutes; committed delayed source data is available in the target system in within fifteen (15) minutes; committed daily source data is available in the target system within four (4) hours; committed Weekly, Monthly, Quarterly, Annual and Odd Cycle source data shall be available in the target system within twenty-four (24) hours.
CR-059	The Vendor shall provide an EDW Solution that maintains a level of data currency in Analytic Data Store where committed source data is available based on intervals to be specified by the Agency; daily source data is available in the target system within four (4) hours; Weekly, Monthly, Quarterly, Annual and Odd Cycle source data shall be available in the target system within twenty-four (24) hours.
CR-060	The Vendor shall provide an EDW Solution that will respond to simple data service requests in less than 125 ms (milliseconds), data service requests of medium complexity in less than 140 ms and complex data service requests in less than 170 ms. Note: <i>Simple Data Service tied to three (3) or fewer business rules and three (3) or fewer external calls.</i> <i>Medium Data Service tied to four (4) to six (6) business rules and four (4) to six (6) external calls.</i>

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 9 - Performance Standards	
Req ID	Requirement
	<i>Complex Data Service tied to more than six (6) business rules and more than six (6) external calls.</i>
CR-061	<p>The Vendor shall provide a solution that will respond to simple direct access queries in less than 25 ms, direct access queries of medium complexity in less than 40 ms and complex direct access queries in less than 70 ms.</p> <p>Note: <i>Simple Data Access Queries tied to one Entity with ten (10) or fewer attributes and one (1) or fewer relationships.</i> <i>Medium Data Access Queries tied to two (2) to three (3) Entities, with eleven (11) to twenty (20) attributes and two (2) to three (3) relationships.</i> <i>Complex Data Access Queries tied to more than three (3) Entities, with more than twenty (20) attributes and more than three (3) relationships.</i></p>
CR-062	<p>The Vendor shall implement an EDW Solution with response times to simple reports within one (1) second or less, reports of medium complexity within two (2) seconds or less, and complex reports within <i>three (3)</i> seconds or less.</p> <p>Note: <i>Simple reports sourced from three (3) or fewer tables, ten (10) or fewer parameters and one (1) data source</i> <i>Medium reports sourced from three (3) to eight (8) tables, ten (10) to fifteen (15) parameters and one (1) to two (2) data sources</i> <i>Complex reports sourced from more than eight (8) tables, more than fifteen (15) parameters and more than two (2) data sources</i></p>
CR-063	<p>The Vendor shall implement requested Specialized Data Stores (SDS) based on the following criteria:</p> <ul style="list-style-type: none"> • Simple SDS Structures shall be implemented within <i>three (3)</i> business days of approval to begin construction. • SDS Structures of Medium complexity shall be implemented within ten (10) business days of approval to begin construction. • Complex SDS structures shall be implemented within thirty (30) calendar days of approval to begin construction. <p>Note: <i>Simple SDS tied to three (3) or fewer data types and one (1) data source</i> <i>Medium SDS tied to three (3) to five (5) data types and one (1) to two (2) data sources</i> <i>Complex SDS tied to more than five (5) data types and more than two (2) data sources</i></p>
CR-064	The Vendor shall provide a solution that will extract, at a minimum, one (1) million rows of data per minute.
CR-065	The Recovery Point Objective (RPO) for the solution shall be no more than fifteen (15) minutes.
CR-066	The Recovery Time Objective (RTO) for the solution shall be no more than twenty-four (24) hours.
CR-067	Upon Agency request, the Vendor shall restore archived data within twenty-four (24) hours of the request.

ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

e. Security Requirements

Table: 10 - Security Requirements below, summarizes the Security requirements for the EDW Project. FX Security Standards are detailed in Technology Standards and Data Security Plan, located in the [EDW Procurement Library](#).

Table: 10 - Security Requirements	
Req ID	Requirement
CR-068	The Vendor shall encrypt all data received, stored, processed, and transmitted by the solution either physically or electronically as required by Federal, State, and Agency regulations, and Industry Standard encryption requirements.
CR-069	The Vendor shall protect all data from loss or unauthorized use or disclosure.
CR-070	The Vendor shall provide detailed security audit trail reporting (e.g. security, level, locale, user ID, before and after changes) for all transactions that use the solution.
CR-071	The Vendor shall provide tools (e.g. alerts, reports), which detect and report data usage anomalies and users who may have misused the system. These alerts and reports shall be delivered to the Agency daily.
CR-072	The Vendor shall provide secure access to its off-site facilities; including storage facilities. The Agency may perform and review physical security audits every one hundred eighty (180) calendar days of the Vendor's off-site and on-site facilities at the Agency's discretion. All Vendor facilities related to the FX enterprise transformation shall meet all State and Federal guidelines.
CR-073	The Vendor shall maintain policies and procedures for providing security clearance, managing staffing controls, allowing access to confidential information, and allowing access to restricted areas within the Vendor's solution as part of the System Security Plan.
CR-074	The Vendor shall respond to risks identified through the periodic security risk assessments with a CMS Information Security Program Plan of Action and Milestones (POA&M) containing clarifying information, a proposed mitigation strategy if necessary, a timeline for implementation, and shall work with the Agency to successfully execute the POA&Ms. The risk assessment report shall be provided to the Agency within ten (10) business days of the event as part of System Security Plan.
CR-075	The Vendor shall continually monitor system activity for intrusion, hacking, unusual activity, and other compromises to the solution. The Vendor shall immediately report any incidents of such, to the Agency. Only Agency authorized Vendor personnel may override system security alerts and edits.
CR-076	The Vendor shall provide a solution which immediately suspends and reports access to users for conditions which violate security rules, represent unauthorized attempts to access data or system functions, and system activity that violates security parameters.

**ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)**

Table: 10 - Security Requirements	
Req ID	Requirement
CR-077	The Vendor's solution code shall never run from a system level account with unlimited privileges such as "root" or "administrator."
CR-078	The Vendor's solution shall meet the minimum password format and management policy as required by the Agency.
CR-079	The Vendor shall perform a monthly review of solution hardware, software, and licenses, and shall present recommendations to the Agency for review and removal of any unneeded hardware, software, and licenses eligible to be decommissioned upon approval from the Agency.
CR-080	The Vendor shall enforce session timeouts after fifteen (15) minutes of inactivity. Long running user-defined queries and batch process are excluded from this requirement.
CR-081	The Vendor shall provide a solution that supports Multi-Factor Authentication with both user id and password verification and an additional level verification. The Vendor shall collaborate with IS/IP vendor to integrate with the Single Sign-on capability for Authentication, Authorization, and Audit.
CR-082	The solution shall integrate with the IS/IP Single Sign-on solution to provide Role-Based Security to the EDW Solution.
CR-083	The Vendor shall provide a solution that protects data through encryption, masking, de-identification, and other techniques where appropriate, and comply with Florida Administrative Code Rule 74-2 Information Technology Security.
CR-084	The Vendor shall manage System User Authorization and System User Access Control for their staff.

2. Technology Solution Component Specific Requirements

This section describes solution capabilities and specific requirements for components of the EDW Solution.

a. Operational Data Store (ODS)

Table: 11 - Operational Data Store and Content Management Requirements below, summarizes the Operational Data Store (ODS) requirements for the EDW Project.

Table: 11 - Operational Data Store and Content Management Requirements	
Req ID	Requirement
CR-085	The Vendor shall design, develop, and implement an Operational Data Store (ODS) solution that shall function as the single source of truth for all healthcare related data retained and utilized for FX enterprise transformation, support all FX Project transaction processing, and support healthcare Providers, healthcare Recipients and any other entity or organization seeking Agency healthcare data, and provide for all Agency Content Management (CM).

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 11 - Operational Data Store and Content Management Requirements	
Req ID	Requirement
CR-086	The Vendor shall gather, document, confirm an understanding of and respond to all business and technical requirements pertaining to the design, development and implementation of the Operational Data Store (ODS) and the Content Management (CM) solutions.
CR-087	The Vendor shall schedule, document, and direct all Joint Application and Design (JAD) sessions for gathering and developing detailed ODS requirements from the Agency.
CR-088	The Vendor, in coordination with the SEAS and IS/IP Vendors, shall implement processes to maintain, access, retain, archive, and otherwise protect from theft, breach, and destruction all ODS data, data structures, metadata, data dictionaries, and other supporting ODS-related information.
CR-089	The Vendor shall deliver a solution which provides data integration, supports industry-standard Data Management methodologies, ETL services, Analytic Data Store technologies, Data Marts, Specialized Data Stores, and Content Management.
CR-090	The Vendor shall design, document, develop implement, maintain and update Logical and Physical Data Models pertaining to the solution.
CR-091	The Vendor shall provide an Entity Relationship Diagrams (ERD) elucidating the design and structure of the solution.
CR-092	The Vendor shall participate in the design sessions for the Integration Services and the various FX modules, as specified by the Agency.
CR-093	The Vendor shall provide a Content Management solution which supports all industry standard content type definitions.
CR-094	The Vendor shall provide a Content Management solution which supports receiving, storing, and utilization of data, data structures, files, images, documents, emails, faxes, Optical Character Recognition (OCR) data, blueprints, and any other digital content necessary to Agency and Enterprise activities.
CR-095	The Vendor shall provide a Content Management solution which provides basic capabilities such as storing, indexing, versioning, rollback, access control, publishing, and reporting.
CR-096	The Vendor shall provide a Content Management solution which has the capability to be enhanced through Agency approved add-ons, plug-ins, APIs or other similar features.
CR-097	The Vendor shall provide a Content Management solution capable of scaling in capacity and performance to meet increased resource demands without interruption or impact to availability and user experience.
CR-098	All ODS ERDs shall be the property of the Agency. The Vendor shall provide to the Agency any ODS ERD upon request and within seventy-two (72) hours.
CR-099	The Vendor shall maintain all ODS ERDs and related documentation in a manner that accurately reflects the current ODS architecture.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

b. Component Specific Solution Requirements

Table: 12 - Component Specific Solution Requirements below, summarizes the Component Specific solution requirements for the EDW Project.

Table: 12 - Component Specific Solution Requirements	
Req ID	Requirement
CR-100	The Vendor's solution shall support and promote an enterprise view, utilizing technologies which align with CMS Standards and Conditions, Agency goals, MITA Maturity Strategy, and nationally recognized business processes and technologies.
CR-101	The Vendor shall demonstrate conformity to industry standards and best practices during all phases of the design, development, and implementation of the solution.
CR-102	The Vendor shall provide and implement an Operational Data Store which incorporates current industry standard tools and technologies where the ongoing support and maintenance skill sets are readily available in the industry.
CR-103	The Vendor's solution shall support a fully scalable architecture designed to allow incremental increases in every capacity to meet expansion in usage demand.
CR-104	The Vendor shall be compliant with the Technical Standards Reference Guide (TSRG), located in the EDW Procurement Library .
CR-105	The Vendor shall be responsible for procuring, installing, operating and maintaining any software needed to support design, development, implementation and ongoing maintenance of the solution.
CR-106	The Vendor shall provide a solution that supports detailed, standardized logging, messaging, and reporting of errors and exceptions.
CR-107	The Vendor in coordination with the IS/IP Vendor shall secure information in transit required by Federal, State and send/receive business partner's regulations, policies or best practices.

c. Data Conversion and Migration

Table: 13 - Data Conversion and Migration Requirements below, summarizes the Data Conversion requirements.

Table: 13 - Data Conversion and Migration Requirements	
Req ID	Requirement
CR-108	The Vendor shall coordinate with the Agency, SEAS, and existing Vendors in development of a Data Conversion and Migration Plan (PD-10) which optimizes the loading process while minimizing the system impact to the users.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 13 - Data Conversion and Migration Requirements	
Req ID	Requirement
CR-109	The Vendor shall implement a Data Conversion and Migration solution which provides the capability of resolving semantic and context conflicts across numerous data sources in a consistent and reliable manner; ensuring both the accuracy and integrity of the data.
CR-110	The Vendor shall identify and document the existing Agency data, data structures, and content the Vendor is responsible for, and shall provide a crosswalk for the identified data, data structures, and content to corresponding elements in the Vendor solution.
CR-111	The Vendor shall provide a Data Conversion and Migration solution that supports connectivity with, loading to, and extracting from Industry Standard Relational Database Management System (RDBMS).
CR-112	The Vendor shall provide a Data Conversion and Migration solution that supports loading to and extracting from NoSQL structures.
CR-113	The Vendor shall provide a Data Conversion and Migration solution that supports Heterogeneous Infrastructures.
CR-114	The Vendor shall provide a Data Conversion and Migration solution that supports Data Transformation and mapping functionality.
CR-115	The Vendor shall provide a Data Conversion and Migration solution that supports Heterogeneous Data Type mapping.
CR-116	The Vendor shall provide a Data Conversion and Migration tool that uses a GUI-based or Web-based design, development and management environment.
CR-117	The Vendor shall provide a Data Conversion and Migration tool that supports loading to and extracting from Flat File repositories.
CR-118	The Vendor shall provide a Data Conversion and Migration solution that supports Cloud-based Migration.
CR-119	The Vendor shall provide the Agency with results of the Data Conversion and Migration. The results will include record counts, document counts and rejected data due to discrepancies. The Vendor shall provide summary reports documenting any data discrepancies and the resolution plan for each.

d. Data Replication

Data Replication is the process to synchronize information from an existing operational system to and from the Operational Data Store. **Table: 14 - Data Replication Requirements** below, summarizes the Data Replication requirements for the EDW Project.

Table: 14 - Data Replication Requirements	
Req ID	Requirement
CR-120	The Vendor shall procure, install, operate, and maintain a Data Replication Tool that will perform all Data Replication activities within the solution.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 14 - Data Replication Requirements	
Req ID	Requirement
CR-121	The Vendor shall design, develop and operate Data Replication process to sync data in real-time between the FMMIS and the ODS databases. If applicable, the replication process should support other systems to sync data in real-time with ODS database.
CR-122	The Vendor shall provide a Data Replication tool that performs loading to and extracting from all major, industry-standard RDBMS structures.
CR-123	The Vendor shall provide a Data Replication tool that performs loading to and extracting from NoSQL structures.
CR-124	The Vendor shall provide a Data Replication tool that performs 1-1, 1-N, N-1, N-N database replication.
CR-125	The Vendor shall provide a Data Replication tool that performs Networked database replication.
CR-126	The Vendor shall provide a Data Replication tool that provides Heterogeneous Infrastructure support.
CR-127	The Vendor shall provide a Data Replication tool that supports Cloud-based replication.
CR-128	The Vendor shall provide a Data Replication tool that performs real-time replication.
CR-129	The Vendor shall provide a Data Replication tool that performs bi-directional replication.
CR-130	The Vendor shall provide a Data Replication tool that performs Data Transformation and mapping functionality.
CR-131	The Vendor shall provide a Data Replication tool that performs content-based filtering.
CR-132	The Vendor shall provide a Data Replication tool that performs Heterogeneous Data Type mapping.
CR-133	The Vendor shall provide a Data Replication tool that performs partial table replication.
CR-134	The Vendor shall provide a Data Replication tool that maintains transactional integrity during transit from source to target.
CR-135	The Vendor shall provide a Data Replication tool that performs the automatic capture of Metadata changes.
CR-136	The Vendor shall provide Data Replication tools which performs GUI-based design, development, and management environments.
CR-137	The Vendor shall provide a Data Replication tool that performs N-Directional Replication Load Balancing.
CR-138	The Vendor shall provide a Data Replication tool that performs loading to and extracting from Flat File repositories.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

e. Integration and Data Services

Integration and data services refers to enabling access and use of enterprise data through the use of the Enterprise Integration Services / Integration Platform (IS/IP) and data services. **Table: 15 - Integration and Data Services Requirements** below, summarizes the Integration and Data Services requirements for the EDW Project.

Table: 15 - Integration and Data Services Requirements	
Req ID	Requirement
CR-139	The Vendor shall design, develop, implement, support and maintain data services to decouple data from modules and applications and maintain separation of concerns.
CR-140	The Vendor shall coordinate with the FX Project Team and the IS/IP Vendor to design, develop, implement and operate a data services integration strategy, providing access to all solution data in accordance with the FX Technical Architecture.
CR-141	The Vendor, in cooperation with the SEAS and IS/IP vendor, shall enforce implementation of components based on a Service Oriented Architecture (SOA) which support reuse of the services and component functionality.
CR-142	The Vendor shall provide transaction recovery after any level of failure, including the ability to successfully roll back transactions, regardless of size or distribution across the system.
CR-143	The Vendor shall provide a solution that supports and maintains the Data Management Governance, Data Security, and Data Quality of all data received by the solution and that maintains data integrity throughout all Replication and ETL (Extract-Transform-Load) processes.
CR-144	The Vendor shall provide a solution that fully integrates with the Enterprise Scheduling software solution provided by the Agency or Agency designated Vendor. If requested by the Agency, the Vendor shall implement and support the Enterprise Scheduling software solution. Please note that the Agency currently uses Windows Task Manager, Cron, SQL Agent, and Autosys for various scheduling needs.
CR-145	The Vendor shall document all services within the solution in the Interface Control Document (ICD) which shall include data layout documentation, data mapping crosswalk, inbound/outbound capability, and information on producer and consumer of the service for all services.
CR-146	The Vendor shall provide and document architecture specifications as part of the System Design Document deliverable which clearly defines how the data services are provisioned and integrated with IS/IP integration service endpoints. All service endpoints/APIs shall be exposed to the ESB and are able to receive and submit messages through the ESB.
CR-147	The Vendor shall provide a solution that provides storing, and utilization of data, data structures, files, images, documents, emails, faxes, OCR data, blueprints, and any other digital content necessary to Agency and Enterprise activities.

**ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)**

Table: 15 - Integration and Data Services Requirements	
Req ID	Requirement
CR-148	The Vendor shall be responsible to collect information for all submitted transactions, including: submitted timestamp, transaction size, user, IP address, and port. The Vendor shall retain this information and provide access for problem resolution, reporting Performance Standards, and other business needs.
CR-149	The Vendor shall integrate with the IS/IP Managed File Transfer (MFT) solution to process both inbound and outbound files securely and at the frequency defined in the Interface Control Document.
CR-150	The Vendor's solution shall provide versioning of services and messages and the proper retirement of outdated services.
CR-151	The Vendor's solution shall support the exchange of data or files via web-services, queues, or other common message brokering protocols.
CR-152	The Vendor shall perform incremental development of data services as driven by business requirements, and implementation roll outs approved by the Agency, not as governed by available technology.
CR-153	The Vendor's solution shall implement functionality to support the exchange of information for multiple entities outside the Agency's Enterprise systems.

f. Enterprise Analytic Data Store

Table: 16 - Enterprise Analytic Data Store Requirements below, summarizes the Enterprise Analytic Data Store requirements for the EDW Project.

Table: 16 - Enterprise Analytic Data Store Requirements	
Req ID	Requirement
CR-154	The Vendor shall design, develop, implement, maintain and operate an Enterprise Analytic Data Store Solution to function as the central data repository for decision making, business intelligence, data analytics, operational reporting, dashboards, and fraud and abuse detection, and that will operate in a near real-time capacity to meet the business, management, and analytical needs of the Agency.
CR-155	In the process of designing, developing and implementing the solution, the Vendor shall maintain a holistic view that supports both industry standards and emerging technologies in relation to Legislative mandates, Agency directives, and CMS approved Medicaid business processes and standards.
CR-156	The Vendor shall demonstrate conformity to industry standards and best practices during all phases of Enterprise Analytic Data Store design, development, and implementation.
CR-157	The Vendor shall provide and implement a solution which incorporates industry standard methodologies, technologies, and tools where the ongoing support and maintenance skill sets are readily available in the industry.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 16 - Enterprise Analytic Data Store Requirements	
Req ID	Requirement
CR-158	The solution shall support a scalable architecture designed to allow incremental increases in every capacity to meet expansion in usage demand.
CR-159	The solution shall support and promote an enterprise view, utilizing technologies which align with Agency goals, MITA Maturity Strategy and nationally recognized business processes and technologies.
CR-160	The Vendor shall be compliant with all aspects of the agreed-to Project Process Agreement (PPA). Further, the Vendor shall update the System Design Document based on Industry Standard System Life Cycle Management practices as defined within the Project Process Agreement (PPA). The PPA will be finalized after Contract execution.
CR-161	The Vendor shall be compliant with the Technical Standards Reference Guide (TSRG) as put forth by the FX Project Team.
CR-162	The Vendor shall gather, document, confirm an understanding of and respond to the business and technical requirements pertaining to the design, development, implementation, maintenance and operation of the Enterprise Data Warehouse solution.
CR-163	The Vendor shall design, develop and implement a Reporting Data Store (RDS) and Analytic Data Store (ADS) that contains the data from the Operational Data Store (ODS) Solution, and that is optimized to provide operational reporting, dashboards, and ad hoc queries in real-time or near real-time.
CR-164	The Vendor shall design, develop, and implement an Enterprise Analytic Data Store that contains information from the RDS and ADS that is optimized to provide analytics, reporting, dashboards, and ad hoc queries.
CR-165	The Vendor shall design, develop and implement a set of Data Marts, which are optimized to provide business unit-specific and personae-based analytics, reporting, dashboards, and ad hoc queries.
CR-166	The Vendor shall confirm and document understanding that each individual Data Mart shall be a separate and distinct implementation, each complying with all Data Mart related requirements and with the EDW Solution requirements.
CR-167	The Vendor shall, in coordination with the FX Project Team, design, document, develop, implement, maintain, operate, and update annually all Logical and Physical Data Models pertaining to the EDW Vendor solution.
CR-168	The Vendor shall provide an Entity Relationship Diagrams (ERD) elucidating the design and structure of the solution. All ERDs shall be the property of the Agency, shall be maintained and updated, at a minimum, annually, and must be provided to the Agency upon request and within seventy-two (72) hours.
CR-169	The Vendor shall be responsible for procuring, operating, and maintaining any software needed to support the design, development, and implementation of the EDW Vendor.
CR-170	The Vendor shall comply with all quality, performance standards, availability, capacity, security, and all other requirements established and defined in cooperation with the FX Project Team.

**ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)**

Table: 16 - Enterprise Analytic Data Store Requirements	
Req ID	Requirement
CR-171	The Vendor shall provide a solution that will initially hold seven (7) years of converted data and support seven (7) years of rolling history in the Enterprise Analytic Data Stores. Data Marts and specialized Data Stores shall have retention periods defined on a case-by-case basis.
CR-172	The Vendor shall provide an RDS and ADS solution that retains all data related to Life Time transactions, data required in relation to legal matters, law suits, and other data as requested by the Agency in a non-Archived state until such time as the Agency gives approval to archive or purge the specified data.
CR-173	The Vendor shall provide a plan for a Data Governance and Enterprise Analytic Data Stores that can collect, consolidate and organize data from multiple Data Sources for reporting and analytics.
CR-174	The Vendor shall schedule, document, and direct all Joint Application and Design (JAD) sessions for gathering and developing detailed Enterprise Analytic Data Store requirements from the Agency.
CR-175	The Vendor shall schedule, document and direct separate Joint Application and Design (JAD) sessions for gathering and developing detailed requirements related to individual Data Marts from the various business units with the Agency.

g. Persona Optimized Analytics & Reporting (POAR)

The EDW Vendor shall provide an EDW Solution that supports role-based personas based on the business need of individual end users. The solution will provide reporting and analytic capabilities based on the assigned user persona.

Table: 17 - Persona Optimized Analytics & Reporting (POAR) Requirements below, summarizes the Persona Optimized Analytics & Reporting (POAR) requirements for the EDW Project.

Table: 17 - Persona Optimized Analytics & Reporting (POAR) Requirements	
Req ID	Requirement
CR-176	The Vendor shall design, develop, implement, maintain, operate and update a Persona Optimized Analytics and Reporting (POAR) solution to function as the standard set of tools for Federal and State reporting, operational reporting, data analytics, financial reporting and analytics, dashboards, and ad hoc reporting for the Agency.
CR-177	The Vendor shall provide and implement a POAR Solution which incorporates industry standard methodologies, technologies and tools where the ongoing support and maintenance skill sets are readily available in the industry.
CR-178	The POAR solution shall support a fully scalable architecture designed to allow incremental increases in every capacity to meet expansion in usage demand.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 17 - Persona Optimized Analytics & Reporting (POAR) Requirements	
Req ID	Requirement
CR-179	The POAR solution shall support and promote an enterprise view, utilizing technologies which align with Agency goals, MITA Maturity Strategy, and nationally recognized business processes and technologies.
CR-180	The Vendor shall provide and implement a POAR Solution which incorporates industry standard methodologies, technologies, and tools able to support the migration of legacy reports to reports developed within the Vendor solution.
CR-181	The Vendor shall be compliant with the agreed-to Project Process Agreement (PPA). Further, the Vendor shall update to the Agency a System Design Document based on Industry Standard System Life Cycle Management practices as defined within the Project Process Agreement (PPA). The PPA will be finalized after Contract execution.
CR-182	The Vendor shall be compliant with the Technical Standards Reference Guide (TSRG), located in the EDW Procurement Library .
CR-183	The Vendor shall gather, document, confirm an understanding of and respond to all business and technical requirements pertaining to the design, development, implementation, maintenance and operation of the solution.
CR-184	The Vendor shall schedule, document, and direct all Joint Application and Design (JAD) sessions for gathering and developing detailed POAR requirements from the Agency.
CR-185	The Vendor shall conduct separate JAD sessions with each business unit within the Agency to gather detailed reporting and analytic requirements (e.g. report types, dashboards, personae, parameterized reports, automated reporting needs, training needs, other specialized reporting considerations).
CR-186	The Vendor shall design, develop, implement, maintain and operate a solution that, through the use of Prescriptive Analytical capabilities, provides recommendations for Business Rules and "Next Steps" to the Agency.
CR-187	The Vendor shall design, develop, implement, maintain and operate a solution that, through the use of Predictive Analytical capabilities, provides healthcare related forecasting based on scenario-driven analysis to the Agency.
CR-188	The Vendor shall design, develop and implement a solution that, through the use of healthcare Diagnostic Analytics, provides assessments of health events in an attempt to determine "what happened and why."
CR-189	The Vendor shall design, develop, implement, maintain and operate a solution that, through the use of Descriptive Analytical capabilities, provides dashboards and other "At A Glance" views derived from real-time data flowing through the Enterprise.
CR-190	The Vendor shall be responsible for procuring, installing, operating, and maintaining any software needed to support the design, development, and implementation of the POAR.
CR-191	Upon request from the Agency, the Vendor shall leverage any existing tools used by the Agency. Upon request from the Agency, the Vendor shall be responsible for managing and provisioning the existing tools used by the Agency.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 17 - Persona Optimized Analytics & Reporting (POAR) Requirements	
Req ID	Requirement
CR-192	The Vendor shall store the solution documentation pertaining to the design, development, implementation, operations, and maintenance of all reports, dashboards and other analytic products on a specific server, SharePoint site or similar document repository as specified by the FX Project Team.
CR-193	The Vendor shall comply with the quality, performance standards, availability, capacity, security, and all other requirements established and defined in cooperation with the FX Project Team.
CR-194	The Vendor shall provide a solution that can perform analytics using data imported from Access, ASCII, dBase, Excel, CSV, HTML, XML, JMP, ODBC, R, SAS, SAP BO, SPSS files, and other industry standard file formats and use the imported data for queries and reporting.
CR-195	The Vendor shall provide a solution that can export query results into Access, ASCII, dBase, Excel, CSV, HTML, XML, JMP, ODBC, R, SAS, SPSS and other industry standard file formats.
CR-196	The Vendor shall implement a solution that has parameterized reporting capabilities.
CR-197	The Vendor shall implement a solution with roll up, drill down, slice and dice, and pivot table capabilities.
CR-198	The Vendor shall implement a solution that can query using both single character and string wild card searches against the available data elements.
CR-199	The Vendor shall implement a solution that has a scheduling tool for reporting and analytic tasks.
CR-200	The Vendor shall implement a solution that can use data from sources external to the RDS and ADS as querying parameters.
CR-201	The Vendor shall implement a solution that can print reports and maps from within the solution.
CR-202	The Vendor shall implement a solution that can query against Data Dictionary and Metadata tools.
CR-203	The Vendor shall implement a solution that can produce dashboards containing charts, graphs, summarized data, and maps.
CR-204	The Vendor shall implement a solution that can create and view dashboards, reports and maps for mobile devices such as Android, iOS, and Windows.
CR-205	The Vendor shall implement a solution that can produce scheduled canned reports, on-demand canned reports, and on-demand ad-hoc reports.
CR-206	The Vendor shall provide a solution that can query both structured and unstructured data.
CR-207	The Vendor's solution shall be able to mask any sensitive data displayed on reports, dashboards, and maps.
CR-208	The Vendor shall procure, operate, and maintain tools that supports Free Hand SQL.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 17 - Persona Optimized Analytics & Reporting (POAR) Requirements	
Req ID	Requirement
CR-209	The Vendor shall develop and maintain a Report Registry that stores information for all reports maintained by and within the solution. The Registry shall at a minimum retain the report name, a detailed description of the report, report creation date, last execution date, most recent users, and frequent users. The registry shall provide the capability to search, view and print reports through a Browser-based User Interface.

h. Specialized Data Stores (SDS)

Table: 18 - Specialized Data Stores (SDS) Requirements below, summarizes the Specialized Data Store (SDS) requirements for the EDW Project.

Table: 18 - Specialized Data Stores (SDS) Requirements	
Req ID	Requirement
CR-210	The Vendor shall design, develop, implement, operate, and maintain a Specialized Data Store solution to function as a repository for specialized, and ad hoc data structures intended for targeted decision making, data analytics, dashboards, audit requests, large volume data extracts, and as a source of research, survey, and analytic data for entities external to the Agency.
CR-211	In the process of designing, developing, implementing, operating, and maintaining the SDS Solution, the Vendor shall maintain a holistic view that supports both industry standards and emerging technologies in relation to Legislative mandates, Agency directives, and CMS approved Medicaid business processes and standards.
CR-212	The Vendor shall demonstrate conformity to industry standards and best practices during all phases of SDS design, development, implementation, operation and maintenance.
CR-213	The Vendor shall provide and implement an SDS solution which incorporates industry standard methodologies, technologies, and tools where the ongoing support and maintenance skill sets are readily available in the industry.
CR-214	The SDS Solution shall provide a fully scalable architecture designed to allow incremental increases in every capacity to meet expansion in usage demand while adhere to accepted performance standards as referenced in Attachment B, Exhibit B-1: Deliverables and Performance Standards .
CR-215	The SDS Solution shall provide and promote an enterprise view, utilizing technologies which align with Agency goals, MITA Maturity Strategy and nationally recognized business processes and technologies.
CR-216	The Vendor shall be compliant with the aspects of the agreed-to Project Process Agreement (PPA). Further, the Vendor shall update the System Design Document based on Industry Standard System Life Cycle Management practices as defined within the Project Process Agreement (PPA). The PPA will be finalized after Contract execution.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 18 - Specialized Data Stores (SDS) Requirements	
Req ID	Requirement
CR-217	The Vendor shall be compliant with the Technical Standards Reference Guide (TSRG), located in the EDW Procurement Library .
CR-218	The Vendor shall design, develop, implement, operate, and maintain the SDS throughout this Contract based on Agency needs, Legislative mandates, and other Agency defined modifications.
CR-219	The Vendor shall gather, document, confirm an understanding of and respond to all business and technical requirements pertaining to the design, development, implementation, operation and maintenance of the Enterprise Data Warehouse solution.
CR-220	The Vendor shall schedule, document and direct the Joint Application and Design (JAD) sessions for gathering and developing detailed SDS requirements from the Agency.
CR-221	The Vendor shall confirm and elaborate the business and technical requirements pertaining to the design, development, implementation, operation and maintenance of the SDS Solution.
CR-222	The Vendor shall design, develop, and implement SDS data structure, and shall retain the data structures for a time period specified by the Agency. The Vendor shall maintain backups of all SDS Data structures for a time period to be specified by the Agency.
CR-223	The Vendor shall store the documentation pertaining to the design, development, implementation, operations, and maintenance of all reports, dashboards, and other analytic products on a specific server, SharePoint site or similar document repository as specified by the FX Project Team.
CR-224	The Vendor shall comply with all quality, performance standards, availability, capacity, security, and all other requirements established and defined in cooperation with the FX Project Team.
CR-225	The Vendor shall be responsible for procuring, operating, and maintaining any software needed to support design, development, and implementation of the SDS Solution.
CR-226	The Vendor shall provide a solution that can query both structured and unstructured data that can be used to build structured and unstructured Specialized Data Stores.

i. Solution Component Specific Requirements

1) Data Dictionary

Table: 19 - Data Dictionary Tool Requirements below, summarizes the Data Dictionary requirements for the EDW Project.

**ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)**

Table: 19 - Data Dictionary Tool Requirements	
Req ID	Requirement
CR-227	The Vendor shall design, develop, implement, maintain and update an enterprise Data Dictionary encompassing the business processes, practices and policies of the Agency and which incorporates current industry standard tools and technologies.
CR-228	The Vendor shall procure, install, operate, and maintain an Enterprise Data Dictionary Tool that supports all Data Dictionary related activities within the solution.
CR-229	The Vendor shall provide a Data Dictionary tool that supports custom Data Dictionary fields for items such as Data Ownership, Data Stewardship, and Data Sensitivity.
CR-230	The Vendor shall provide a Data Dictionary tool that supports design, development, and implementation of a Data Dictionary on all industry standard RDBMS platforms, and that also supports NoSQL databases.
CR-231	The Vendor shall develop a Data Dictionary using industry standard practices identified and cited by the Vendor and approved by the Agency. At a minimum, the Data Dictionary shall contain for each field: Human readable/"plain English" field name; A field description; Database field name; Database table name; Field data type; Field length; any valid values associated with the field; and a Description of each valid value. The Data Dictionary must be published online in a readable, searchable format available for all end users.
CR-232	The Vendor shall provide a Data Dictionary tool that supports global Data Dictionary search and query functionality.
CR-233	The Vendor shall provide a Data Dictionary tool that supports a single Global Data Dictionary across multiple databases in a heterogeneous database environment.
CR-234	The Vendor shall provide a Data Dictionary tool that provides support for documenting Cross-Database table relationships.
CR-235	The Vendor shall provide a Data Dictionary tool that supports exporting all or customized, user-defined portions of the Data Dictionary to HTML, PDF, and other industry-standard formats.
CR-236	The Vendor shall provide a Data Dictionary tool that shall support industry standard data modeling and Entity Relationship notation (e.g. UML, ERD, IDEFX1, IE).

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**ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)**

2) Metadata Management Tool and Repository

Table: 20 - Metadata Management Tool and Repository Requirements below, summarizes the Metadata Management Tool and Repository requirements for the EDW Project.

Table: 20 - Metadata Management Tool and Repository Requirements	
Req ID	Requirement
CR-237	The Vendor shall design, develop, implement, maintain, and operate a repository that contains all Agency Metadata, specifically: Business Metadata which provides the context and standard definitions of business terms related to enterprise data; Technical Metadata which is used for development and maintenance of the solution; Data Quality Metadata which advises users about the currency (freshness), accuracy, validity and completeness of the enterprise data; Operational Metadata which is used to control, monitor and describe the behavior of solution processes; Security Metadata identifies the information on security requirements; and end user Metadata which can help to understand and influence user attitudes towards and use of the solution.
CR-238	The Vendor shall provide a Metadata Management Tool that supports Impact Analysis capabilities, Data Lineage capabilities, and a searchable Metadata Catalog for all data objects within the solution.
CR-239	The Vendor shall provide a Metadata Management Tool that supports Enterprise-wide Impact Analysis capabilities, including the ability to view all upstream and downstream objects impacted by a proposed change to any data object within the solution.
CR-240	The Vendor shall provide a Metadata Management Tool that supports end-to-end Data Lineage capabilities, providing a continuous view of the flow of data through the solution.
CR-241	The Vendor shall provide a Metadata Management Tool that supports a fully searchable Metadata Catalog and that supports the linkage of data objects to business descriptions, business rules, and other supporting documentation.
CR-242	The Vendor shall provide a Metadata Management Tool that supports the ability to capture Metadata from a broad range of sources such as data models, business intelligence tools, ETL/Replication tools, flat files and relational data structures and NoSQL data sources.

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ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

- 3) Extract Transform Load (ETL) Management
Table: 21 - ETL Management below, summarizes the ETL Management requirements for the EDW Project.

Table: 21 - ETL Management	
Req ID	Requirement
CR-243	The Vendor shall design, develop, maintain, and operate ETL processes that are extensible, scalable, and easy to change and can transform many different data structure formats.
CR-244	The Vendor shall procure, implement, operate and maintain an ETL Management Tool that supports the ETL activities within the solution.
CR-245	The Vendor shall provide an ETL Management Tool that supports connectivity, extraction, transformation, and loading activities with a variety of data sources (e.g. RDBMS, NoSQL, Big Data, and Flat File repositories).
CR-246	The Vendor shall provide an ETL Management Tool that supports collection of data transformation functions such as data type conversion, data reformatting, date manipulation, string handling and regular expressions.
CR-247	The Vendor shall provide an ETL Management Tool that uses a GUI-based or Web-based development environment for the design, development, and implementation of complex ETL processes.
CR-248	The Vendor shall provide an ETL Management Tool that uses a GUI-based Job Scheduler and supports connectivity to and interaction with industry-standard enterprise Job Scheduler technologies.
CR-249	The Vendor shall provide an ETL Management Tool that supports connection to industry standard Job Scheduler tools.
CR-250	The Vendor shall provide an ETL Management Tool that uses runtime monitoring, alerts, error handling, and logging.
CR-251	The Vendor shall provide an ETL Management Tool that supports data quality management functionality with both automated and user-defined quality control capabilities.
CR-252	The Vendor shall provide an ETL Management Tool that supports data cleansing functionality capable of detecting and correcting or removing inaccurate or malformed data.
CR-253	The Vendor shall maintain a copy of the data in its pre-ETL State based on Agency agreed data retention timeline. The copies must be readily available to Authorized Solution Users and stored in an industry standard file format. Copies of pre-ETL data will be used to verify that data was transformed properly in the event all or part of the ETL process fails.
CR-254	The Vendor shall implement the capability to accept, transform, and load all HIPAA X12 and National Council for Prescription Drug Programs (NCPDP) transactions either via an IS/IP Interface or Electronic Data Interchange (EDI) transaction into the solution.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

4) Additional Solution Capabilities

Table: 22 - List of Additional Solution Capabilities below, summarizes the additional Solution Capability requirements for the EDW Project.

Table: 22 - List of Additional Solution Capabilities	
Req ID	Requirement
CR-255	The Vendor shall propose solutions for utilizing Machine Learning capabilities within the Agency. Options for consideration include Automation of Data Redaction, Workflow Analysis and Automation, Predictive Analytics, Electronic Health Record Management, and the building and analysis of a Healthcare Knowledge Base.
CR-256	The Vendor shall implement a Consent Management solution for allowing recipients to determine and express what information the Agency will be permitted to access and share with other entities.
CR-257	The Vendor's solution shall include data anonymization services at all relevant levels to comply with HIPAA and all other Federal, State and Agency Privacy and Security requirements. The anonymization process shall support post-anonymization analysis and shall provide this functionality within ETLs, Specialized Data Stores and Data Marts.
CR-258	The Vendor shall implement a solution that performs automated Medicaid financial balancing. The financial balancing processes shall provide process start and completion dates and times, source record counts, and dollar amounts (where appropriate), target record counts and dollar amounts (where appropriate). All balancing report data shall be stored as a data structure within the ODS.
CR-259	The Vendor shall design, develop, implement, maintain and operate a secure web portal for public access to data, reports, and dashboards approved by the Agency for public consumption.
CR-260	The Vendor shall provide a solution that will receive and utilize data updates via delta files processing.
CR-261	The Vendor shall design, develop, implement, maintain, and operate archiving solution as defined in the Technology Standards, located in the EDW Procurement Library , where the data is properly maintained, accessible, retained, archived, and protected from destruction.
CR-262	The Vendor shall procure, operate and maintain a Data Version Control tool that addresses retrieval of specific versions of data for later analysis.
CR-263	The Vendor shall procure, operate and maintain a data sharing Agreement tool that provides for sharing, management, and stewardship of data across the Agency and its stakeholders.
CR-264	The Vendor shall implement, maintain and operate an Enterprise Batch processing framework for all batch and interface processing. The batch process must integrate with the Enterprise job scheduler.

ATTACHMENT B
SCOPE OF SERVICES (October 7, 2019)

Table: 22 - List of Additional Solution Capabilities	
Req ID	Requirement
CR-265	The Vendor shall design, develop, implement, maintain, and operate an Audit Framework that provides the functionality of an audit trail on all changes to the solution with business and system dates, begin date, effective date, end date, and user-id, and assignment/ enforcement in all tables which can be modified.
CR-266	The Vendor shall design, develop, implement, maintain, and operate an Audit Framework that provides common web-services for the modules and Agency IT systems to store transaction audit information in the Operational Data Store.
CR-267	The Vendor shall provide Authorized Users with the ability to search, view, print, export, and analyze audit data through a User Interface.

3. Project Life Cycle Tool Requirements

This section describes requirements for the Vendor to provide or use specific tools during the performance of professional services under this Contract.

The FX Project Team will evaluate and provide ongoing guidance to the Vendor on the Agency’s requirements for use of specific system delivery management tools. The Vendor’s responsibility to use and provide a Project Life Cycle tool from the following options:

- Vendor Preference - Vendor has discretion to select and use the Vendor’s preferred tool;
- Agency Preference – Vendor has discretion to select and use Vendor’s preferred tool considering Agency preference considerations such as Agency use or licensing;
- Agency Specified - Vendor is to provide and use an Agency specified tool;
- Agency Provided - Vendor is to use an Agency-provided solution or managed service;
- Multi-Agency Service - Vendor is to use a Florida multi-Agency provided solution or managed service.

a. Project Management Tool Requirements

Project Management Tools to be provided or used by the Vendor are located in the Project Lifecycle Tools document in the [EDW Procurement Library](#). The Vendor shall propose use of additional tools required to perform Services of this Contract. Subject to Agency approval, the Vendor may use alternate tools. Optionally, upon request by the Agency, the Vendor shall procure, configure, implement and maintain Project Management tools for FX Projects.

b. System Delivery Management Tool Requirements

System Delivery Management Tools to be provided or used by the Vendor are located in the Project Lifecycle Tools document in the [EDW Procurement Library](#). The Vendor shall propose use of additional tools required to perform Services of this Contract. Subject to Agency approval, the Vendor may use alternate tools. Optionally, upon request by the Agency, the Vendor shall procure, configure, implement, and maintain System Delivery Management tools for FX Projects.

ATTACHMENT B SCOPE OF SERVICES (October 7, 2019)

F. Services Requirements

1. Contract Wide Services Requirements

This section defines requirements for Vendor provided services that are applicable to all projects, project stages, and phases of work performed under this Contract.

a. Reporting Requirements

The Vendor shall provide a reporting solution that meets the business needs across the entire Agency. The reporting solution shall comply with all Federal and State reporting requirements. The proposed solution shall provide an array of reporting and analytic tools.

The Vendor shall adhere to reporting requirements included in this section. The Agency reserves the right to direct the Vendor to amend or update its reports and/or report formats in accordance with the best interests of the Agency and at no cost to the Agency. The Agency will notify the Vendor of such modification, in writing.

All electronic transmission of reports and supporting documentation containing Protected Health Information (PHI) and Personally Identifiable Information (PII) as defined by the Health Insurance Portability and Accountability Act (HIPAA) shall be encrypted to meet the HIPAA privacy standards. Unless otherwise directed by the Agency, all electronic reports shall be formatted utilizing Microsoft Word or Excel, version 2016 or greater. Supporting documentation may be submitted in Adobe PDF format. The Vendor shall upgrade its electronic report format as directed by the Agency.

Administrative report formats shall be finalized and approved by the Agency no later than thirty (30) calendar days after execution of this Contract, unless otherwise agreed to by the Agency.

The Vendor shall develop reports, using formats approved in advance by the Agency, complying with the requirements established by the Agency. When reporting requirements are not established in this Contract, the Agency will provide the Vendor with instructions and submission timetables. The Agency reserves the right to modify reporting formats and submission timetables resulting from changing priorities or management direction. All reports shall be developed and produced **at no additional cost to the Agency**.

1) Monthly Reporting

- a) The Vendor shall submit monthly reports. At a minimum, monthly reports shall include the following:
 - Monthly EDW Project Status Report (see **FX Project Management Standards**, located in the [EDW Procurement Library](#)); and
 - Monthly Vendor Staffing Report.
- b) The Vendor shall submit a monthly Vendor Staffing Report to include its staff organization chart; roles, responsibilities, and authority for all staff; staff acquisition and release dates; resource calendars; and identification of any staffing level deficiencies and the status of the

ATTACHMENT B

SCOPE OF SERVICES (October 7, 2019)

actions taken to resolve identified deficiencies. Monthly reports shall be due on the second (2nd) Business Day of each month following the reporting month. If the second (2nd) calendar day falls on a weekend or holiday, then the report is due on the next business day.

- 2) Ad Hoc Analysis and Reports
 - a) The Agency reserves the right to request the Vendor to conduct ad hoc analyses and provide ad hoc reports. In such instances, the Agency will make the request in writing.
 - b) The Vendor shall provide ad hoc reports on an as needed basis **at no additional cost to the Agency**. Ad hoc reports may be requested on any aspect of the data collected by the Vendor.
 - c) Ad hoc reports shall be submitted to the Agency within fourteen (14) calendar days from the time of the request, unless the Agency directs the Vendor to provide the data or information in less than fourteen (14) calendar days. If the fourteenth (14th) calendar day falls on a weekend or holiday, then the report is due on the next business day.

2. Project Management Life Cycle Requirements

The Vendor shall perform Project Management for the duration of this Contract. The Vendor shall employ a sound project management methodology and shall maintain compliance with **FX Project Management Standards** and the accompanying **FX Project Management Toolkit**, which set forth the expectations and requirements for managing all FX Projects. The **FX Project Management Standards** document and **FX Project Management (PM) Toolkit** are located in the [EDW Procurement Library](#).

a. Project Management Requirements – Contract Wide

1) Standards

The **FX Project Management Standards** articulate how an FX Vendor shall strive to achieve project management goals and manage successful FX Projects. The FX Project Vendors shall adhere to integrated processes designed to support the effective governance and management of all projects within the FX Portfolio. Descriptions are provided for each process in the **FX Project Management Standards** document and include integrated:

- Project change, risk, action item, issue, decision, and lessons learned management;
- Schedule management;
- Organizational change management;
- Cost management;
- Status reporting;
- Resource management;