Florida Health Care Connections (FX)

Style Guidelines

Updated December 20, 2018

Please apply the style guidelines below as you author items related to the Florida Health Care Connections (FX) Project. The goal is to standardize our language and formatting to improve the overall level of consistency. In addition, applying these standards will reduce QA cycle times.

A. Proper References and Abbreviations

- Refer to this project as the Florida Health Care Connections (FX) Project.
- Refer to this project's Contract Number as MED-191.
- Refer to the vendor providers and agency project team as follows (per ITN):
  - › The North Highland Team should be referred to as the SEAS Vendor.
  - › The IV&V provider should be referred to as the IV&V Vendor.
  - › AHCA project team should be referred to as the FX Project Team.
  - › Agency for Health Care Administration should be referred to as AHCA or the Agency.
  - › The North Highland Company LLC should be referred to as North Highland.
  - › Cambria Solutions, Inc. should be referred to as Cambria.
  - › ProCom Consulting, Inc. should be referred to as ProCom.
  - › The team acting as the PMO and that will provide overall scheduling, standards, templates and deliverable quality assurance, and document management support should be referred to as the FX EPMO.
  - › The team to provide governance, strategic planning, portfolio management, LBR support, and APD support should be referred to as the Strategic Domain Team. The team to advance MITA maturity, gain approval of funding, procure vendors, maintain communications with CMS, and gain CMS certification should be referred to as the Programmatic Domain Team.
  - › The team to create the data, technology, security, and FX project implementation strategies, processes, tools and documentation to launch and operate the MES modernization program should be referred to as the Technical Domain Team.
- Deliverable Vocabulary (Bold being the **Agency** preferred)
  - › the **Agency** vs. AHCA
  - › sister agencies vs. partner agencies vs. stakeholder organizations – see SMC style guide
  - › **FX** vs. FX Project – when referring to overall effort
  - › MCOs vs. health plans
  - › Member vs. **recipient** (enrollee)
  - › FX Module vs. **FX Project**
- Define terms once. After a term has been defined, it does not need to be defined again. For example, Agency for Health Care Administration will be defined in the Executive

Summary as the Agency. Every chapter thereafter should reference it as AHCA or the Agency.

- Apply these rules for capitalizing "state:"
  - › Generic reference… use lower case "s." Example, many states have implemented a COTS solution.
  - › Specific reference to Florida or any other state… use capital "S." The State of Florida…The State has a $90 Billion budget.
- Apply these rules for spelling "healthcare" or "health care":
  - › When used as a modifier, for example "healthcare" provider, it is one word.
  - › When used as a noun and/or pronoun, as in Agency for "Health Care" Administration, it is two words.
- Apply these rules for using "i.e." or "e.g.":
  - › I.e. is the abbreviation for id est and means "in other words."
  - › E.g. stands for exempli gratia and means "for example."
- Apply these rules for using "that" or "which":
  - › A defining clause (also called an essential clause or a restrictive clause) gives information essential to the meaning of the sentence. "That" is used in defining clauses. Here's an example: *My bike that has a broken seat is in the garage.* In this sentence, you understand that the speaker has at least one other bike. Specifically, the bike he's talking about is distinguished from his other bikes by its broken seat. If you removed the clause "that has a broken seat," you would lose the implication that he owns more than one bicycle, and even if you somehow knew about the other bikes, you wouldn't know which one was in the garage.
  - › "Which" introduces non-defining clauses. Unlike defining clauses, non-defining clauses (also called nonessential or nonrestrictive clauses) don't limit the meaning of the sentence. You might lose interesting details if you remove them, but the meaning of the sentence wouldn't change. Sometimes, these phrases are set off by commas. *My bike, which has a broken seat, is in the garage.* Here, the broken seat seat is simply a description of the bike in the garage. There's no implication that the speaker owns more than one bike.
- Apply these rules for using "shall" or "will":
  - › Use *will* when the Agency has the action (i.e The Agency will…)
  - › Use *shall* with other enitities (i.e. The Vendor shall…)
- Refer to the [Project Glossary](#) on the FX Projects Repository for common abbreviations as necessary.
- References to Numbers – When referring to numbers, use text for 1-9 and numerals for 10 or greater. For example, "Our office has won eight Grammy awards." Similarly, "FSU has 375 athletes on scholarship."
  - › An exception to the rule is tabs. Use numerals for all tab references since these are (arguably) proper nouns.

- › Another exception would be references to multiple numbers in a sentence with some less than 9 and others greater than 9. In that case use numerals. For example, "The team scored on 7 out of 15 attempts."
- › For Procurement/Contract documents all numbers should be written out:
    - – Return within two (2) months
    - – hundreds and thousands
    - – Percentages - …ninety-five percent (95%)
- References to Plans (and Sub-plans) – When referring to a previously submitted/approved Plan (or Sub-plan), be sure to reference it correctly and consistently throughout the document.
    - › O-1: SEAS Management Plan (SMP)
    - › S-1: Enterprise Systems Governance Plan
    - › S-2: Enterprise Systems Strategic Planning Training Program
    - › S-3: Enterprise Systems Strategic Plan
    - › S-4: Strategic Project Portfolio Management Plan
    - › P-1: Revised MITA State Self-Assessment and Update Process
    - › P-2: MES Project Management Standards
    - › P-3: MES Project Management Toolkit
    - › P-4: Medicaid Enterprise Certification Management Plan
    - › T-1: Data Management Strategy
    - › T-2: Information Architecture Documentation
    - › T-3: Data Standards
    - › T-4: Technical Management Strategy
    - › T-5: Technical Architecture Documentation
    - › T-6: Technology Standards
    - › T-7: Design and Implementation Management Standards
    - › T-8: Enterprise Data Security Plan
    - › WP01: Project Charter
    - › WP02: Human Resource and Staff Management Plan (HRSMP)
    - › WP03: Quality Assurance Plan (QAP)
        - – This work product was rolled into O-1: SEAS Management Plan
    - › WP04: Project Schedule
    - › WP05: Communications Plan
        - – This work product was rolled into O-1: SEAS Management Plan

- References to Meetings – When referring to a recurring meeting in a deliverable or work product, be sure to accurately name the meeting and its frequency throughout the document:
  › FX Project Meeting is a weekly meeting that occurs every Tuesday at 11am EST in Conference Room 1204B. All SEAS teams (AHCA, NH, IV&V, additional vendors) meet to discuss the project's status and goings on.
  › FX Risk Meeting is a biweekly meeting that occurs every other Thursday at 1pm EST in Conference Room 1204B. Selected FX Project team members serve on the FX Project Risk Team.
- References to SharePoint – When referring to the SharePoint site, use "FX Projects Repository" (FXPR).

B. Sentences

- Enter one (1) space between sentences.

C. Bullets

- Make bullet points consistent in structure within each unique list. For example, make the list all sentences or fragments or questions, not a mix. However, if you have multiple sets of bullet points in a document, it is not necessary to make them consistent with each other--just within the individual list.
- Punctuate bullets consistently. That is, if one bullet ends with a period (full stop), end all with a period, following these rules:
  › If all bullets are sentences, end each one with a period (full stop).
  › If all bullets are phrases or fragments, use no end punctuation.
- Avoid ending bullet points with semicolons. Semicolons have been used that way, but the style is obsolete.
- Avoid making bullet points so long that they look like paragraphs. Three lines is a reasonable maximum length.
- Avoid using transition words and phrases such as "secondly" or "another point." Such linking phrases are unnecessary, and they slow down readers.
- List assumptions in each tab as bullets.

D. Commas

- Insert a comma after the last word preceding the "and" or "or" in a list. For example: this project is fun, exciting, and challenging.

E. Copy and Paste

- For text, ALWAYS use copy/paste special feature and choose "Unformatted Text."

- When pasting graphics from other Microsoft products, use the paste special function - Home>Paste>Paste Special>Picture (Enhanced Metafile).

F. Exhibits

- Title any exhibits to include the tab number followed by the chronological number of the exhibit within the tab itself. For example, for a third exhibit in Tab 2 titled Team Summary, you would title the exhibit as follows: **Exhibit 2-3: Team Summary.**

- Verify the caption below every exhibit to ensure the numbers are sequential in each section of a document. Select all and update fields to make sure that caption auto-numbers are updated. For the first occurrence in a section use the \r 1 suffix in the field code to restart the count to 1.
    - › Example of exhibit caption (first exhibit in a section):
        - − **Exhibit** {STYLEREF Deliverable-H1 \s }-{SEQ Exhibit * ARABIC \r 1 }: **Data Management Framework – Common Data Architecture**
    - › Examples of exhibit caption (not first exhibit in a section) :
        - − **Exhibit** {STYLEREF Deliverable-H1 \s }-{SEQ Exhibit * ARABIC }: **Data Management Framework – Common Data Architecture**

- Please note, when editing and adding exhibits into a document, it is much easier to copy and paste the field code from a previous exhibit in the document than to copy and paste the code directly from this Style Guide

- Verify text styles within any tables are consistent according to the style guides in the template.

- Make sure references to exhibits in the paragraphs are bold, properly cross referenced, and match the numbering beneath the respective exhibits. They often get out of sync as edits progress.

G. MS Word Styles

- Do not change the styles. If you are copying from another document so that styles will be consistent, do not highlight a word that you are replacing; simply place your cursor where you want the text to be inserted and then click paste. You should now delete the unnecessary documentation. The new text should be automatically changed to the document style. The Quick Style Guide Gallery can also be used as another mechanism for selecting the right styles.

H. Document Naming Conventions

The naming conventions are established to identify and index FX Project documentation for storage in the FX Project Repository. These conventions support document management goals

for standardization, searchable criteria, and version control. The file naming conventions used on this project include:

- [PROJECT]-[VENDOR]-[DEL#/WKP]-[SHORT TITLE]- [VERSION] where:
  › [PROJECT] – SEAS (Use FAH07 for internal North Highland (NH) working documents)
  › [VENDOR] – The Deliverable Owner (Use abbr. vendor name – e.g., NH)
  › [DEL#] – Vendor Deliverable ID per the SOW
  › Or [WKP] – Project work products (e.g., Meeting Agenda and Minutes, Status Reports)
  › [SHORT TITLE] – Short title for the deliverable or work product as defined in the SEAS Management Plan
  › [VERSION] – 00# for drafts or #00 for approved or final documents, where # is incremented for each submittal

- File Naming Examples
  › SEAS-NH-D02.1-Project-Charter-003 (third draft submitted to AHCA)
  › SEAS-WKP-Meeting-Agenda-001 (Draft Meeting Agenda)
  › SEAS--WKP-Meeting-Agenda-002 (2nd draft Meeting Agenda – initial submission date is retained)
  › SEAS-NH-D02.3-CMP-100 (NH approved/baselined Communications Management Plan)
  › SEAS-NH-D02.3-CMP-101 (NH updated, new draft Communications Management Plan from previous baseline 100)
  › SEAS-NH-D02.3-CMP-200 (NH new approved/baseline 200 Communications Management Plan)

- Do not add text or details to the name of the file (no initials, change details, etc.)

- Ignoring the naming standards will compromise the usability of the FXPR. Long filenames could cause the file and folder path to exceed the maximum character path length of 260 characters imposed by Microsoft SharePoint.

I. Footnotes

- When using footnotes in a deliverable or document for the client, follow Chicago, 17th edition: https://owl.english.purdue.edu/owl/resource/717/05/

J. AHCA Guidelines

- For further guidance, the Agency has provided the following link to their Style Guides, Templates and Correspondence Manuals:

https://portal.ahca.myflorida.com/comm/Correspondence/Forms/AllItems.aspx

Remote Desktop Access required.