

EDW Reference Guide

- A. The below table (**EDW Procurement Library**) provides a list of the current documents, file names, and a short description for each document within the library. *NOTE:* Some links contained within these documents are to materials within the Agency's repository, which is not accessible to the public. Access to these materials, as needed, may be provided to the Vendor after Contract award.

EDW Procurement Library		
	Document Name and File Name	Description
1	FX Procurement Strategy Florida-FX-Procurement-Strategy-v.5-FINAL.pdf	The FX Procurement Strategy articulates the Agency's high-level plans to advance the MITA maturity of FX. This strategy is used to communicate Florida's approach with CMS and stimulate discussion with CMS representatives. Additionally, this strategy is a communication tool with other stakeholders, including the Florida Legislature, the health care information technology (HIT) industry, and other entities that interact with the Agency. This strategy is updated as further research and planning are completed and additional guidance is released by CMS.
2	FX Current-to-Future-State Roadmap Florida-FX-Program-Current-to-Future-State_2018-0524.pdf	The FX Current-to-Future-State Roadmap provides a high-level view of the current state of FX and a phased approach to transitioning to the future state of FX.
3	Systems, Applications, and Volumetric Data FX-Volumetric-Information_Aug 2019.pdf	The purpose of the Systems, Applications and Volumetric Data document is to state the statistics for the Systems/Applications that operate currently within the Agency. This may include the total number of users, number of concurrent users, user types, user roles, number of outbound and inbound interfaces, number and type of databases, database size, and average volume of transactions per day.
4	Medicaid Enterprise Certification Toolkit (MECT) MECT-2_3-AppendixA_MECL-and-At-a-Glance-Sheets.pdf	CMS developed the Medicaid Enterprise Certification Toolkit (MECT) in 2007 to assist states as they plan, develop, test, and implement their Medicaid Management Information System (MMIS). CMS has updated the toolkit to accommodate modular and agile development, refined certification criteria, developed a new approach to CMS-state partnership, updated criteria to reflect the latest regulations and guidance, and provided templates and tools to assist states and their contractors in the certification process.
5	MECT-2_3-Appendix-B_Required-Artifacts-List.pdf	
6	Medicaid Enterprise Certification Life Cycle (MECL) MECT-2_3-Medicaid-Enterprise-Certification-LifeCycle.pdf	A cornerstone of the Medicaid Enterprise Certification Toolkit (MECT) is the Medicaid Enterprise Certification Life Cycle (MECL) . MECL includes milestone reviews throughout the CMS MMIS life cycle so the state receives early feedback about issues that may impede certification. The MECL and certification checklists certify alignment with Medicaid Information Technology and Architecture (MITA), and the standards and conditions for Medicaid IT. The MECL is a revised approach to the original CMS MMIS Certification process that states are required to undergo to achieve certification. The MECL contains four life cycle phases and three different milestone reviews. One of the benefits of this new process is that it allows states to receive early feedback about issues that may impede certification.
7	MITA Concept of Operations (ConOps) MITA-Con-Ops-100.pdf	The FX Procurement Project and modular implementation will occur over the next several years. The purpose of the MITA Concept of Operations (ConOps) and the MMIS ConOps is to document the Agency's Vision and Guiding Principles for its transformation to a modular environment during this timeframe. This document outlines the overarching goals and sequencing of opportunities to improve upon current technologies and to set the foundation for future technologies.
8	Medicaid Management Information System (MMIS) ConOps MMIS-Con-Ops-100	

EDW Reference Guide

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9	Enterprise Data Types SEAS-FX-Data-Types_Nov2018.pdf	The Enterprise (MES or FX) Data Types provides guidance on characteristics of data types. The list provides guidance for each data type's description, relevance to FX, relevance to the EDW, anticipated used in EDW components, data retention criteria based on corresponding Florida Department of State Records Management rules, and other information management characteristics. The FX Data Types also includes data types that may not be relevant to FX or EDW and an indication of the data location for that data type.
10	FX Data Management Strategy (FX DMS) SEAS-NH-Data-Management-Strategy100.pdf	The FX Data Management Strategy aligns with the MITA 3.0 Part II Information Architecture - Chapter 2 Data Management Strategy, while accounting for unique Agency requirements. The FX DMS is the product of current-state discovery, stakeholder input, strategic analysis, program strategy, and direction about techniques and priorities to support overall improvement of FX Project outcomes.
11	Enterprise Data Security Plan SEAS-NH-Data-SecurityPlan-100.pdf	The Enterprise Data Security Plan provides the iterative documentation through the implementation of the modularized solution. Its primary purpose is to serve as the guiding principles of the enterprise data security for the systems and vendors.
12	FX Data Standards SEAS-NH-T-3-Data-Standards-200.pdf	The FX Data Standards align with the MITA 3.0 Part II Information Architecture and establishes the Data Standards to facilitate the interoperability of systems and effective data sharing across FX.
13	Design and Implementation Management Standards SEAS-NH-Design-and-Implementation-Mgmt-Standards-100.pdf	The Design and Implementation Management Standards defines the minimum set of design and implementation management standards, establishes a process to maintain the standards, develops management template reports for FX Vendors to use as guidelines in preparing design and implementation processes, and establishes a protocol for the SEAS Vendor to assist the Agency in reviewing and monitoring the standards throughout an FX Project.
14	MMIS Core Certification Checklists SEAS-NH-EDW-ISIP-Combined-Certification-checklist_2019-04-12	The MMIS Core Certification Checklists reflect current regulations, MITA Architectures and Conditions and Standards for Medicaid information technology. These checklists are used throughout the MECL and support various approaches states can use to implement MMIS systems, including modular, phased, waterfall and agile. <u>Note: The EDW Vendor and ISIP Vendor will be responsible for meeting these requirements during the certification process.</u>
15	EDW Reference Guide SEAS-NH-EDW-ReferenceGuide-201	The EDW Reference Guide provides a comprehensive listing and description of documents within the EDW Procurement Library.
16	MITA State Self-Assessment SEAS-NH-P-1-Revised-MITA-SS-A-and-Update-Process-100	The purpose of the MITA State Self-Assessment and Update Process is to assess the current FMMIS and Medicaid Enterprise systems against the MITA Framework, create the required documents and artifacts to support the MES Project planning, funding and certification needs, and recommend an iterative process for tracking and updating the SS-A throughout the Project.
17	FX Project Management Standards SEAS-NH-P-2-Project Management Standards-200.pdf	This document provides the FX Project Management Standards that an FX Vendor shall apply when planning, monitoring, and executing a project within the FX Portfolio. This document also articulates how an FX Vendor shall strive to achieve project management goals and manage successful projects for the Agency.

EDW Reference Guide

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18	FX Project Management Toolkit SEAS-NH-P-3-PM-Toolkit-200.pdf	A companion to the FX Project Management Standards, the FX Project Management Toolkit is to support the FX Vendors in developing consistent Project Management Plans and support integrated processes developed by the FX Program Management Office.
19	Medicaid Enterprise Certification Management Plan SEAS-NH-P-4-Certification-Plan-200.pdf	The Medicaid Enterprise Certification Management Plan provides an overall plan to manage the certification milestone reviews throughout the Medicaid Enterprise Certification Life Cycle (MECL) for each applicable FX module, along with recommendations to consider as the Agency moves forward with the modular approach to replacing the current MMIS. The plan outlines the steps necessary for the Agency to conduct and comply with the CMS MMIS Certification process, including gathering documentation and managing milestone reviews.
20	FX Project Management Plan Template SEAS-NH-PMP-Template-300(002)	The FX Project Management Plan Template provides boilerplate language required to align with the FX Project Management Standards and maintain consistency in how FX Projects are managed.
21	FX Project Lifecycle Tools SEAS-NH-Project_Lifecycle_Tools.pdu	The FX Project Lifecycle Tools provides both project management and system delivery methodology tools to be provided or used by the EDW Vendor.
22	FX Governance Plan SEAS-NH-S-1-FX-Governance Plan-200.pdf	The FX Governance Plan outlines an enterprise governance framework to enable effective decision-making within the Agency through a hierarchy of groups who own defined decision recommendation rights and accountabilities. This framework, coupled with structured decision-making tools and processes, creates a robust plan to manage the large and complex system transformation.
23	FX Strategic Plan SEAS-NH-Strategic-Plan100.pdf	<p>The purpose of the FX Strategic Plan is to guide the Agency by documenting the FX aspirational end-state and supporting areas for investment through the FX Vision, Guiding Principles, and Strategic Priorities detailed in this document.</p> <p>Interested parties can use the Agency's 2018 Concept of Operations for further detail. From this FX Strategic Plan, the Portfolio Management process (based off the Strategic Project Portfolio Management Plan) will capture and prioritize detailed initiatives based on alignment with this FX Strategic Plan and other investments.</p>
24	Strategic Project Portfolio Management Plan SEAS-NH-Strategic-Portfolio-Plan-100.pdf	The Strategic Project Portfolio Management Plan documents the processes for the identification, categorization, evaluation, and prioritization of projects and operational endeavors to accomplish the Agency's enterprise strategies, while balancing conflicting demands on resources, priorities, and capacity. This plan describes the decision support tools necessary to achieve the strategic objectives of FX, managing and optimizing the portfolio of projects and programs, and effectively measuring and reporting portfolio performance to the Enterprise System Governance team.
25	FX Technical Architecture Documentation SEAS-NH-Technical-Architecture-Deliverable-100.pdf	The FX Technical Architecture Documentation documents and establishes the framework for Business Services, Technical Services, Application Architecture, and Technical Capability Matrix (TCM).

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26	FX Technical Management Strategy SEAS-NH-Technical-Management-Strategy-100.pdf	The FX Technical Management Strategy aligns with the MITA 3.0 Part III Technical Architecture - Chapter 2 Technical Management Strategy while prioritizing unique Agency requirements. This document is the product of current state discovery, stakeholder input, strategic analysis, program strategy and direction about techniques, and priorities to support overall improvement of FX Project outcomes.
27	Technology Standards SEAS-NH-Technology-Standards-Deliverable100.pdf	The Technology Standards document establishes and populates 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 that organizes and groups related technology components standardizing the names and descriptions of those components that each Vendor will be expected to follow.
28	Technology Standards Reference Guide SEAS-NH-Technology-Standards-Reference-Guide_2018-08-28.pdf	The Technology Standards Reference Guide (TSRG) is a repository of standards relevant to technology components that identifies and prioritizes the relevance of specific technology standards in the enterprise. Together with the TSRM, these two components make up the FX technology standards that help technology stakeholders identify opportunities, implement, operate, and continuously improve systems that each vendor will be expected to follow.
29	Organizational Change Management (OCM) Tools and Definitions SEAS-NH-WKP-OCM-Tools-100PDF	<p>The Organizational Change Management (OCM) Tools and Definitions will be used to assist the FX Enterprise OCM Team (i.e., the Agency's Organizational Change Management Team) and each FX Project Vendor's OCM team with planning, managing, tracking and reporting the organizational changes that are resulting from FX projects.</p> <p>The FX SEAS OCM Team will create templates for the change management tools to be used by each FX Project Vendor's OCM team. The development of standard templates will help to ensure consistency in approach and delivery of change management across FX projects.</p>
30	Strategic Enterprise Advisory Services (SEAS) Style Guide SEAS-NH-WKP-Style-Guide101.pdf	The Strategic Enterprise Advisory Services (SEAS) Style Guide will be used to provide guidance and consistency when creating documents for the FX projects. Style guidance includes proper use of names, capitalization, abbreviations, acronyms, terminology, references, structure, file naming, nomenclature and resources.
31	Statewide Medicaid Managed Care (SMMC) Style Guide SMMC-Style-Guide_2018-10-04.pdf	The Statewide Medicaid Managed Care (SMMC) Style Guide should be used to provide guidance and consistency when creating documents for the SMMC programs. Style guidance includes proper use of names, capitalization, abbreviations, acronyms, terminology, references, nomenclature and resources.