



Executive Steering Committee (ESC) Meeting

December 11, 2020

FLORIDA HEALTH CARE CONNECTIONS





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Roll Call





Welcome Remarks

Shevaun Harris, Acting Secretary & FX Executive Sponsor

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FX Program

Agenda

- November 20, 2020 FX ESC Meeting Summary
- FX Program Updates
 - FX Strategic Roadmap
- FX Module(s) Update
 - Unified Operations Center (UOC) Procurement Overview
 - Integration Services/Integration Platform (IS/IP) Design, Development, and Implementation (DDI) Workstream (WS)-C Overview
- Open Discussion
- Upcoming Activities





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FX Program Updates

Mike Magnuson, FX Director

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FX Program Updates

Since November ESC Meeting

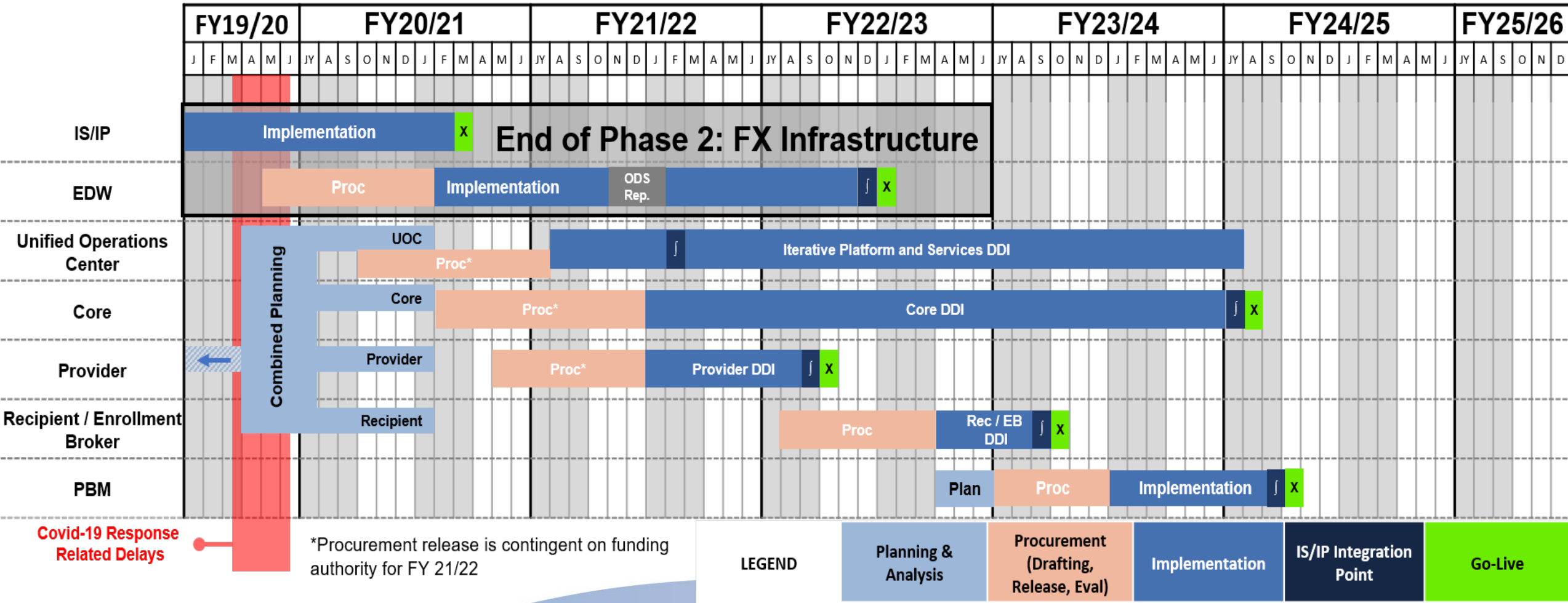
- Submitted Quarter 3 Budget Amendment request
- Revised Strategic Roadmap
- Finalizing EDW Contract



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FX Program Updates

FX Strategic Roadmap – Fall 2020 Revisions



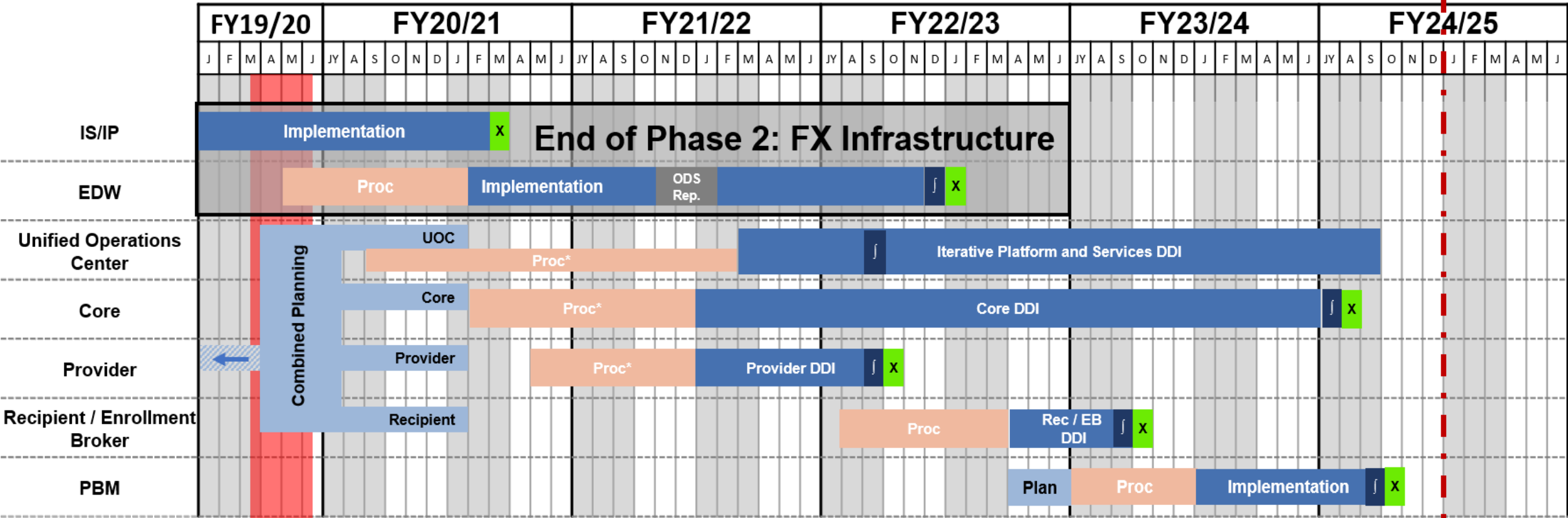


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Deadline to resolve Fiscal Agent contract

FX Program Updates

FX Strategic Roadmap – Revisions



COVID-19 Response Related Delays

*Procurement release is contingent on funding authority for FY 21/22





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FX Program Updates

Dashboard as of December 3rd

FX Program	Status				
	Scope	Schedule	Budget	Risks	Issues
	G ↔	G ↔	G ↔	G ↔	G ↔

Scope	• The scope of the FX Program is currently unchanged.
Schedule	• The Agency and SEAS Vendor are working to keep the program on schedule to meet the December 2024 deadline.
Budget	• The FY 2021-22 Legislative Budget Request (LBR) has been submitted. Program spending is within the appropriation.
Risks	• Currently, there are no FX Program risks in an increasing status. All risks are being proactively monitored.
Issues	• Currently, there is no open issue affecting the program.

Active FX Projects	Status			
	Schedule	Budget	Risks	Issues
IS/IP Design, Development, and Implementation (IS/IP DDI)	G ↔	G ↔	G ↔	G ↔
Enterprise Data Warehouse (EDW) Procurement and EDW Implementation Readiness	G ↔	G ↔	G ↔	G ↔
Unified Operations Center (UOC) Procurement Project	G ↔	G ↔	G ↔	G ↔
Single-Source Credentialing (SSC) Planning Project	Y ↓	G ↔	G ↔	G ↔
Provider Management Module Procurement (PMMP) – <i>On Hold</i>				

Trending Indicators:

- *Stable* (↔) – Program/project health status is consistent and remains unchanged from the last reporting period
- *Improving* (↑) – Program/project health status has improved since the last reporting period and/or remediation activities are producing the desired results
- *Declining* (↓) – Program/project health status has declined since the last reporting period; issues are more probable and/or remediation activities are not producing the desired results



FX Module(s) Update



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UOC Procurement Overview

Damon Rich, FX Business Architect



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UOC Procurement Overview

Scope of Services Draft Outline – High-Level Sections

UOC Scope of Services Outline
General Overview
UOC Platform and Services Solution
Introduction
Transition / DDI Phase
UOC Platform Solution (Technology)
UOC Services Solution
Customer Service Support
Business Services - Provider Management
Business Services - Recipient Management
Enterprise Operations Management
Facilities/Service Location
Additional Innovation Opportunities
Staffing
Reporting / Oversight
Performance Standards, Liquidated Damages and Financial Consequences
Operations and Maintenance
Turnover



UOC Procurement Overview

UOC Technology Components

- 12 Automatic Call Distribution (ACD)**
- Intelligent Routing
 - Multiple Call Queues
 - CRM Integration
 - Multichannel Support

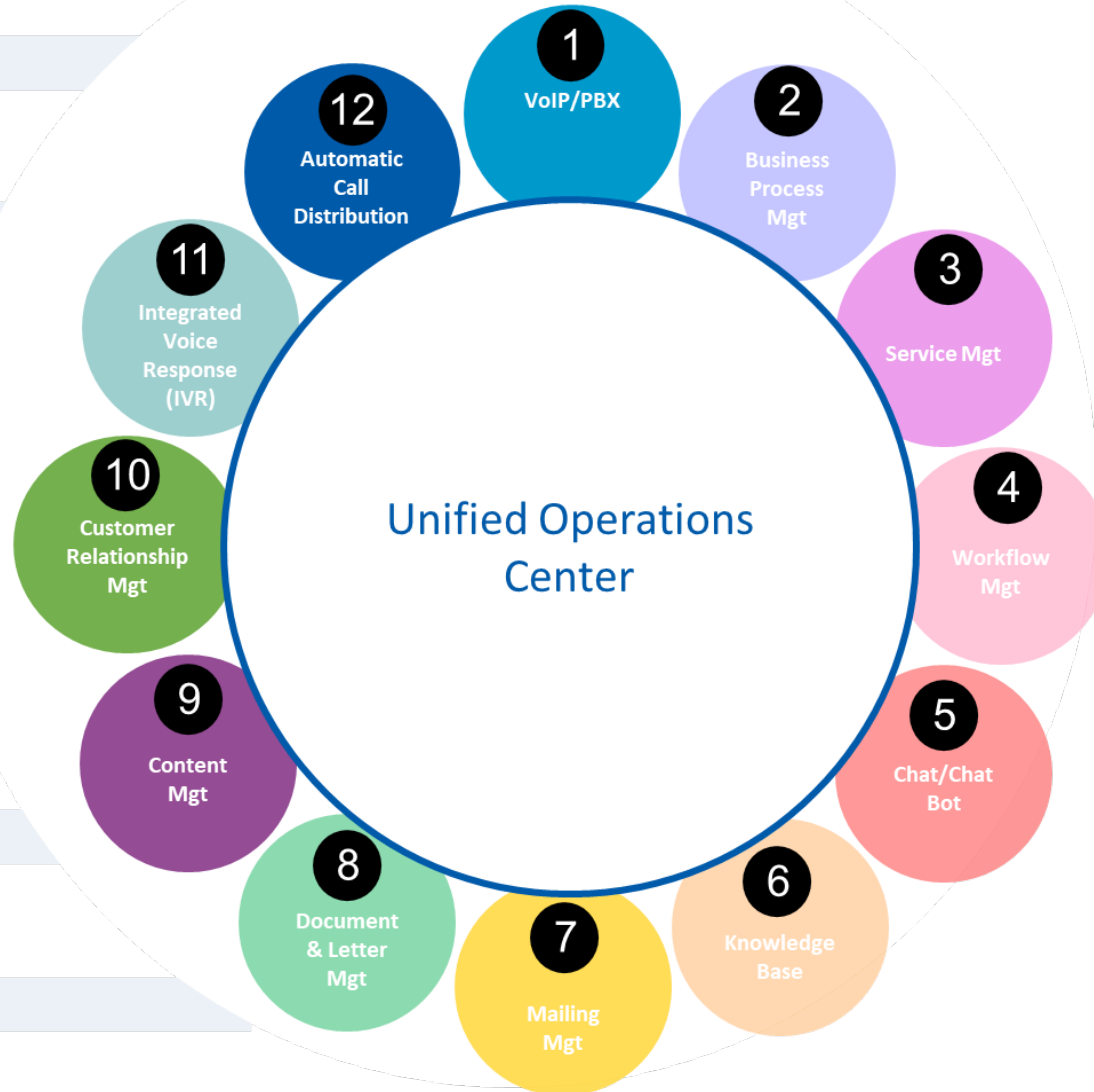
- 11 Integrated Voice Response (IVR)**
- Cloud Based
 - Voice/Keypad/DTMF
 - Call Recording
 - Natural Language Speech Recognition
 - Graphical Environment
 - Auto Call Distribution

- 10 Customer Relationship Management**
- Cloud Based
 - Agent Workflows
 - Service Portal
 - Incident Management
 - Problem Management
 - Release Management

- 9 Content Management**
- Cloud Based
 - Disaster Recovery
 - Archive Management
 - ML Redaction
 - Workflow Management
 - Role-based Access

- 8 Document/Letter Management**
- Rule-Based Content
 - Template Creation
 - Multichannel Delivery
 - Various Import Formats
 - Multiple Export Formats
 - Database Support

- 7 Mailing Management**
- Folding
 - Mail Inserter
 - Mail Sorting
 - Return Mail Processing
 - Barcode Reader
 - Reporting



- 1 Voice Over IP (VoIP)/Private Branch Exchange (PBX)**

- Call Queues
- Call Recording
- Multi-site
- Analytics
- CRM Integration
- Digital Receptionist

- 2 Business Process Management (BPM)**

- Process Engine
- AI-driven Workflows
- Activity Monitor
- Business Process Model
- Workflow Automation
- Decision/Design Studio

- 3 Service Management**

- Knowledge Base
- Ticket Prioritization
- Agent Workflows
- Incident Management
- Problem Management
- Release Management

- 4 Workflow Management**

- Workflow Automation
- Business Activity Monitor
- Service Portal
- Workflow Analytics
- Robust API
- CM Integration

- 5 Chat/Chat Bot**

- Searchable
- Multi-lingual
- Multichannel Chat
- Reporting & Analytics
- Chat Transfer
- Agent Routing

- 6 Knowledge Base**

- Chat Bot Integration
- NLP Support
- Multi-lingual
- Searchable Platform Integration
- Robust Decision Trees

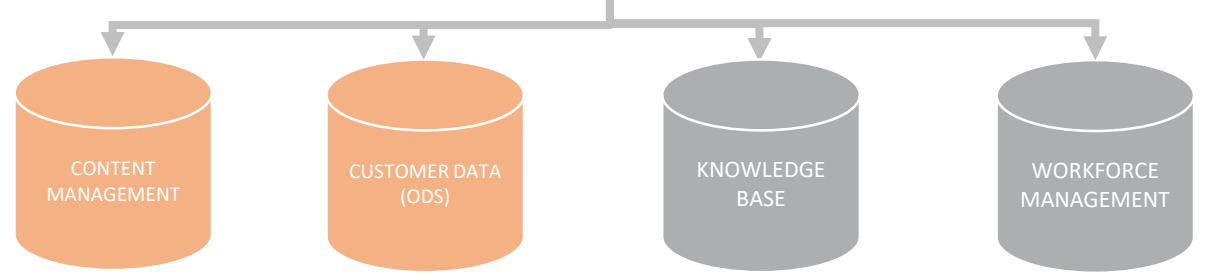
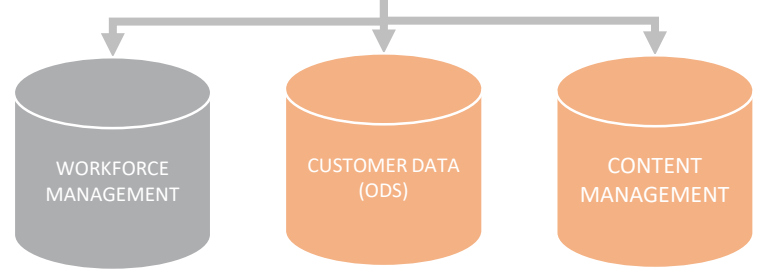
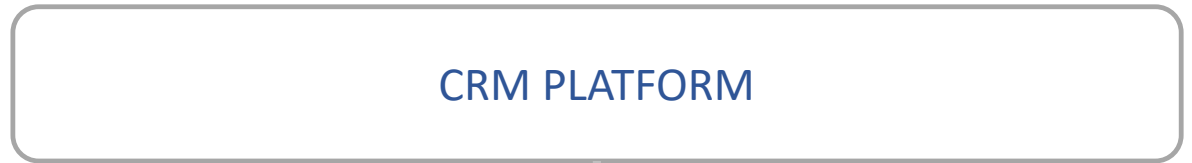
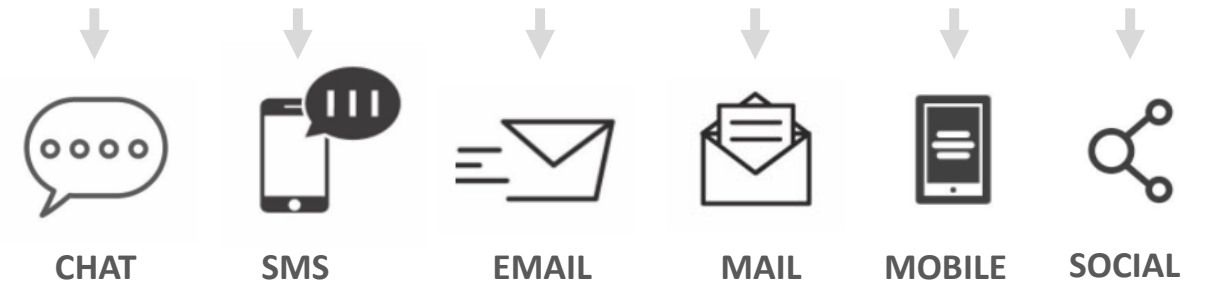
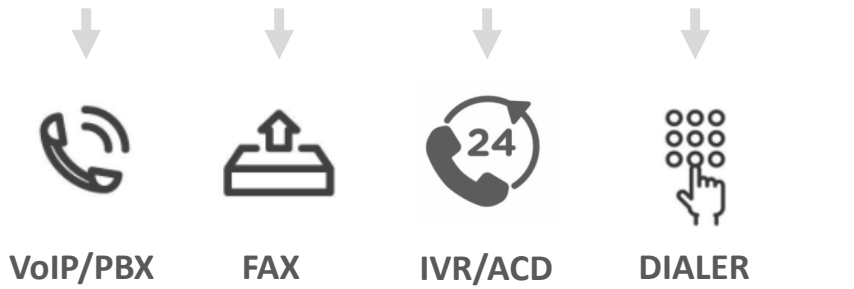
UOC Procurement Overview



MEMBER / PROVIDER
EXTERNAL STAKEHOLDERS/AGENT

TELECOMMUNICATIONS

MULTICHANNEL



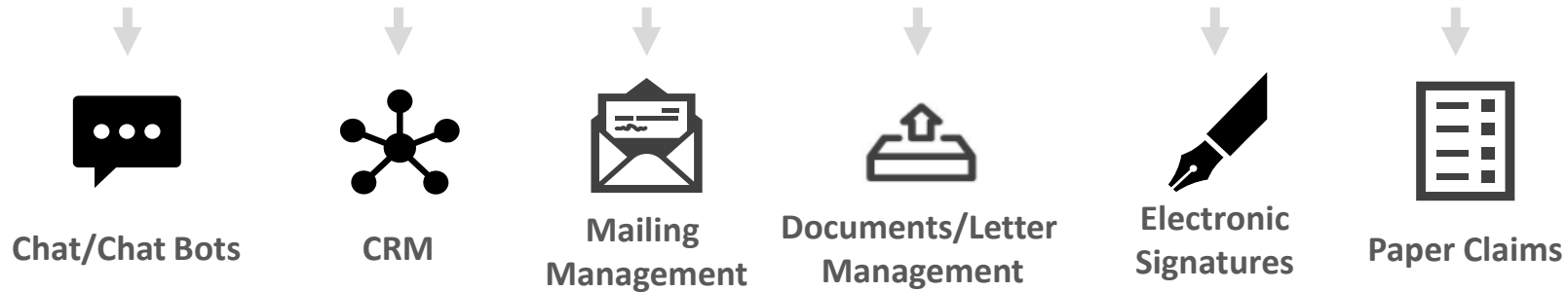
= UOC Component = non-UOC Component

UOC Procurement Overview

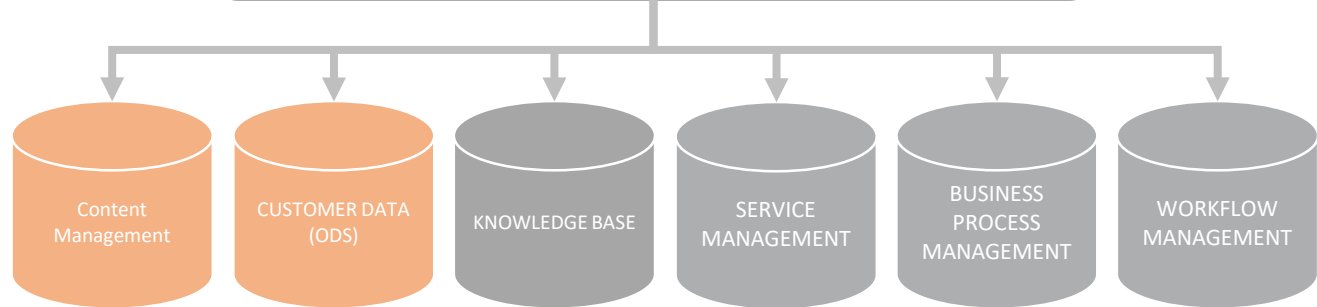


MEMBER / PROVIDER
EXTERNAL STAKEHOLDERS/AGENT

OPERATIONS



OPERATIONS PLATFORM



 = UOC Component  = non-UOC Component



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UOC Procurement Overview

Procurement Outline Highlights – General Overview

Purpose

The Agency is procuring a Unified Operations Center (UOC) solution, including the following suite of services, to support inbound and outbound multi-channel communications between the Agency and its stakeholders across the breadth of FX. This approach enables the Agency to advance its goals of improving the provider and recipient experience and transforming to an enterprise, modular, and flexible solution.

- **UOC Platform/Infrastructure:** Systems and infrastructure to support Agency customer service to its stakeholders. This includes the network, telephony, and technology used in customer service management. Major components include, but may not be limited to, unified contact distribution and routing, self-service interaction capabilities, workforce management, quality assurance, contact recording and translation, multi-language support, program knowledge management, and training.
- **Customer Service Operations:** Skilled resources to communicate with stakeholders. This includes flexible capacity to meet cyclical and event-based spikes in stakeholder interactions.
- **Business Area Operations:** Skilled resources to perform business area (Provider, Recipient) operations tasks that relate to stakeholder contacts (e.g., Choice Counseling support, provider enrollment).
- **Communications Management:** Management and tracking of Agency and stakeholder communications. This includes coordination of the release of information and ensures consistency of message and format. This also optimizes use of secure, electronic delivery of communications.
- **Centralized Mail and Fulfillment:** Management of printing and release of outbound mail including address validation and returned mail handling. This includes handling receipt of inbound mail to the Agency as well as production and distribution of the Medicaid Blue and Gold membership cards.
- **Customer Contact Analysis and Reporting:** Historic and real-time analytic capabilities to understand issues, trends, and opportunities to improve the communication experience with Agency stakeholders based on contact related information. This enables improvements affecting the general population and better personalization to improve the efficiency and effectiveness of contacts.



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UOC Procurement Overview

Procurement Outline Highlights – General Overview

Current State Overview

There is no unified record of Agency communications among platforms, which can result in a siloed and confusing user experience. In addition, multi-vendor/platform environments can create inefficient staffing models and redundant costs. The Agency recently completed an assessment of the provider and recipient experience, including an analysis of touchpoints and channels of communications across the end-to-end stakeholder journey. The analysis highlighted some key pain points for providers and recipients, including:

- The provider experience is prone to errors driven by multiple disconnected channels and manual touchpoints.
- There is limited information about the end-to-end provider enrollment process and requirements, and limited visibility into a provider's enrollment status.
- Providers utilize separate customer care portals (Agencies, the Fiscal Agent, health plans, etc.) that are not linked, do not reference each other, and require the provider to know when to use each portal.
- Manual contact tracking and communication creates silos of information that are not centrally accessible to agents and state staff.
- Tasks rely on email for tracking and assigning work.
- Limited self-service options result in increased calls/agent support.
- There is a lack of communication and support for providers and recipients during critical business processes.
- Multiple entry points and unique web portals cause confusion for stakeholders.
- Provider and/or recipients receive communications from multiple entities which can cause confusion.
- Provider and/or recipients may not receive accurate information due to data access, quality and synchronization issues.





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UOC Procurement Overview

Procurement Outline Highlights – General Overview

UOC Objectives	<p>The objectives of the UOC module include:</p> <ul style="list-style-type: none">• Consolidate customer service, enterprise operations and communications functions that are currently fragmented across several systems (FMMIS, Enrollment Broker, PBM) to provide a more consistent and cohesive user experience.• Increase efficiency of the Agency customer service and contact operations by leveraging a central pool of general knowledge agents cross-trained on the consolidated service array.• Modernize best-practice customer service and contact technology and infrastructure that will support more customer self-service, better analytical functionality and increase Agency data-driven decision-making.
Roles and Responsibilities	<p>Unified Operations Center (UOC) Vendor</p> <p>The UOC Vendor is responsible for designing, developing, implementing, and operating the UOC Solution and providing ongoing support and services to assist the Agency and the Module Vendors in connecting and communicating with the UOC. The UOC Vendor shall coordinate with the Agency, IS/IP, EDW, Module Vendors. The UOC Vendor shall use the IS/IP solution for communicating with other FX modules and shall use the EDW solution data management, data warehousing and data integration capabilities. The UOC Vendor shall support all IV&V activities and requests as directed by the Agency for the duration of the resulting Contract.</p> <p>FX Module Vendors</p> <p>The FX Module Vendors provide best-in-class modular Medicaid-function solutions. The FX Module Vendors shall coordinate with the UOC Vendor, IS/IP Vendor and EDW Vendor to integrate and test the end-to-end FX functionality. FX Module Vendors are responsible for their modular components and connecting to the Integration Platform, EDW and UOC Solutions. FX Module Vendors shall use the IS/IP and EDW solutions for communicating with other FX modules.</p>



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IS/IP DDI: Workstream (WS)-C High-Level Overview

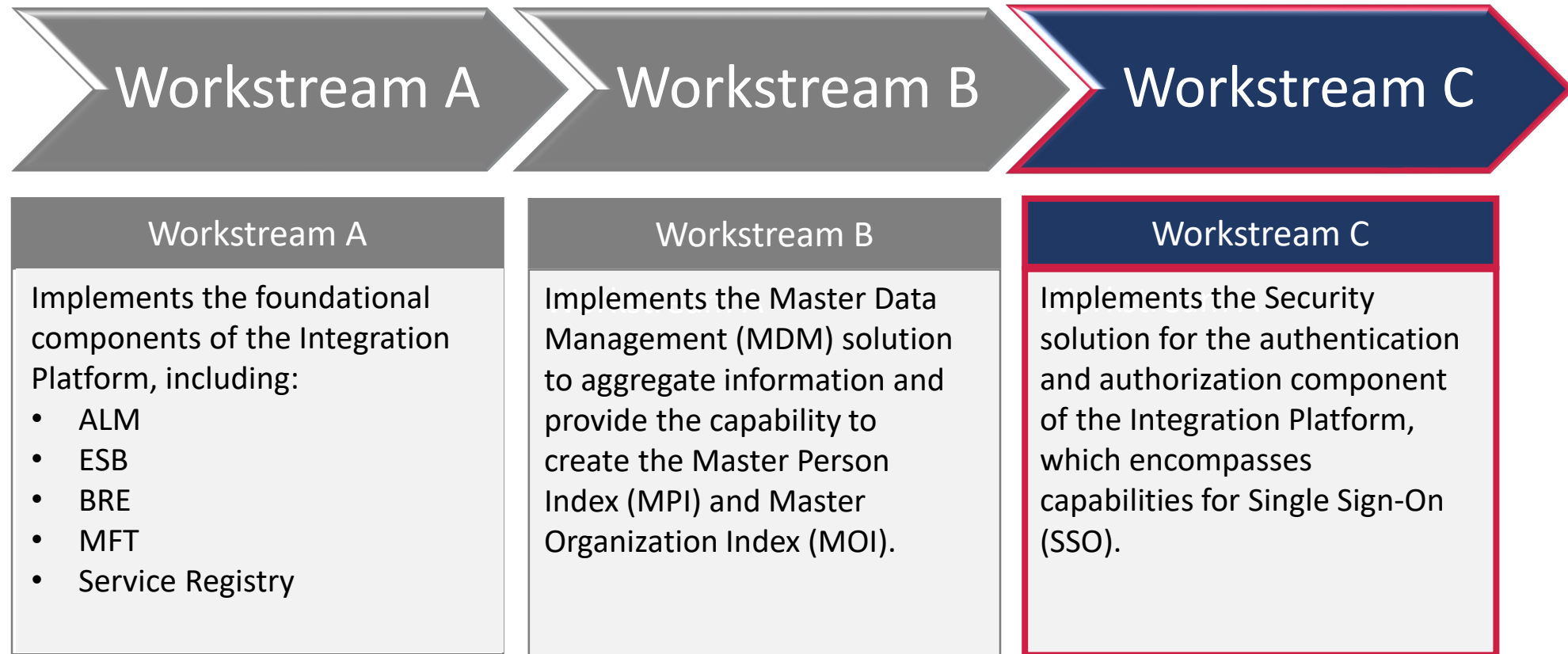
Scott Ward, CIO, Director of Information Technology & IS/IP Project
Executive Sponsor

Angel Garay, IS/IP Project Team Lead



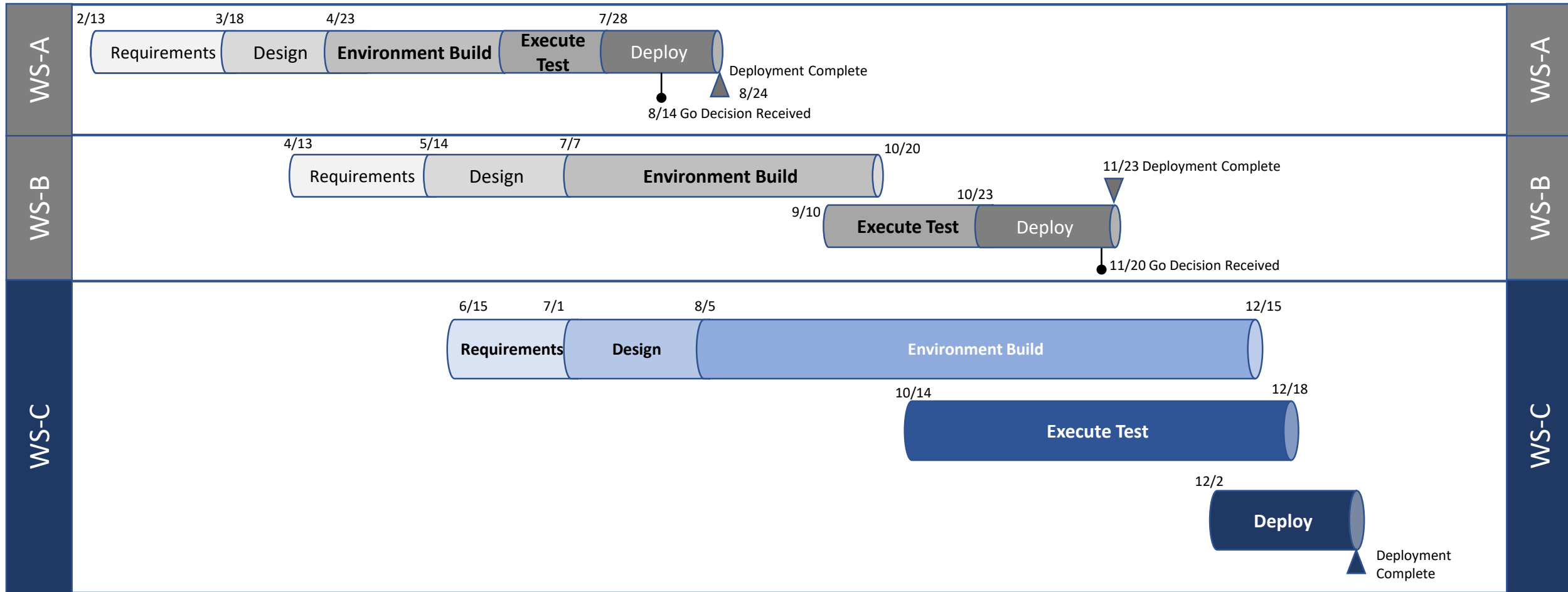
IS/IP Implementation: WS-C Overview

Overview



IS/IP Implementation: WS-C Overview

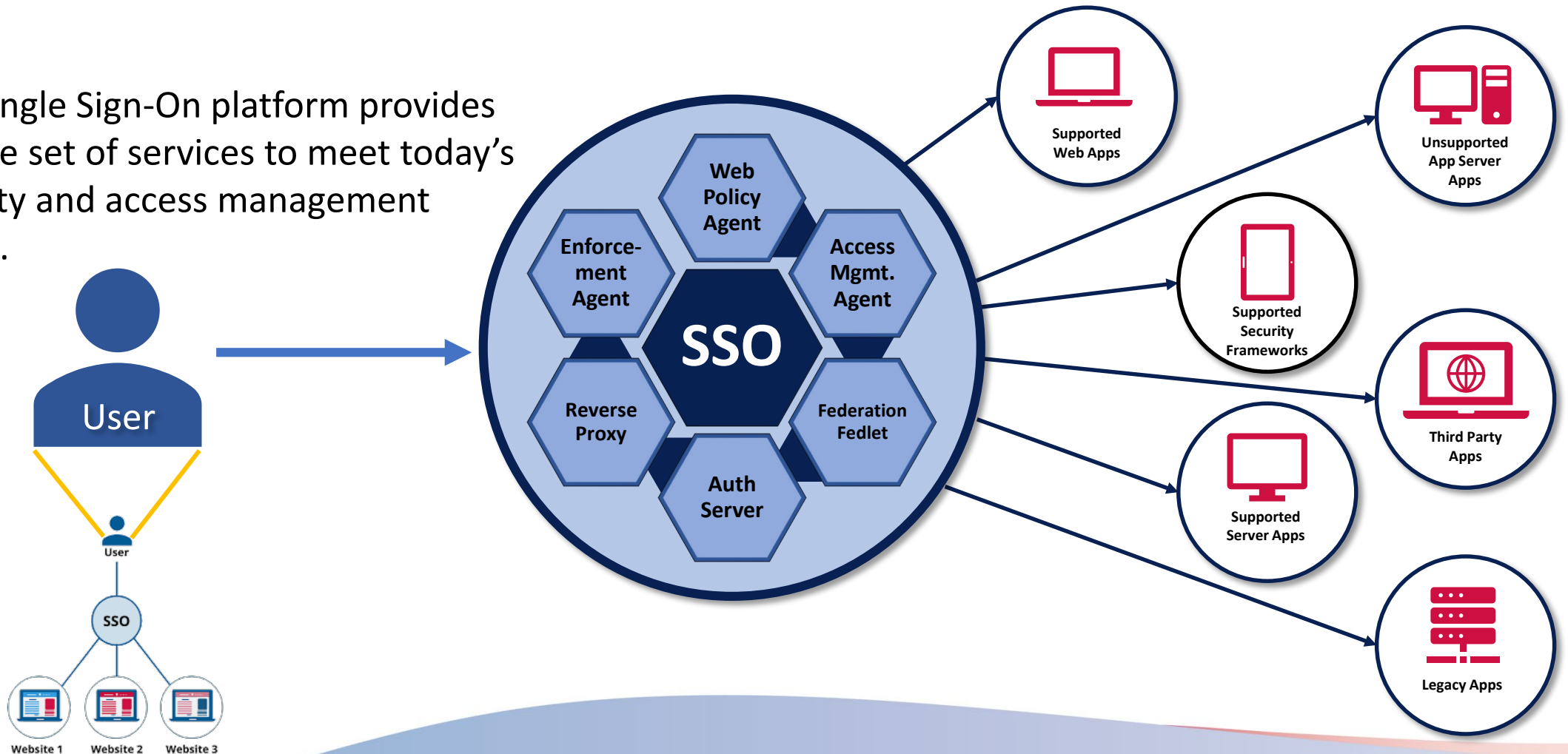
Timeline



IS/IP Implementation: WS-C Overview

IS/IP Single Sign-On (SSO) Architecture Overview

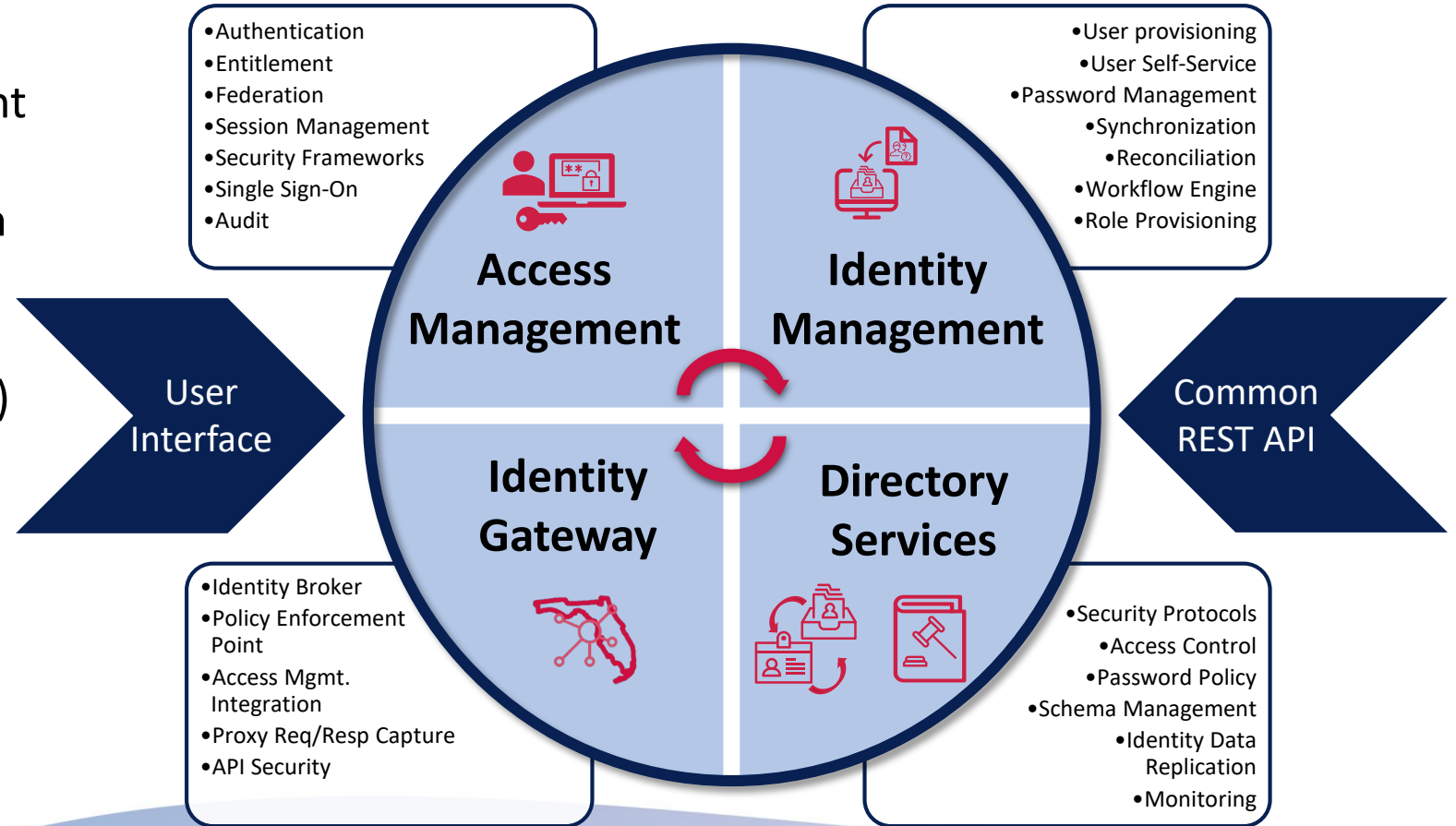
- The Single Sign-On platform provides flexible set of services to meet today's identity and access management needs.



IS/IP Implementation: WS-C Overview

IS/IP SSO Architecture Overview

- The SSO platform is built on an Identity and Access Management solution, ForgeRock.
- This platform includes four main components:
 - Access Management (AM)
 - Identity Management (IDM)
 - Identity Gateway (IG)
 - Directory Services (DS)



IS/IP Implementation: WS-C Overview

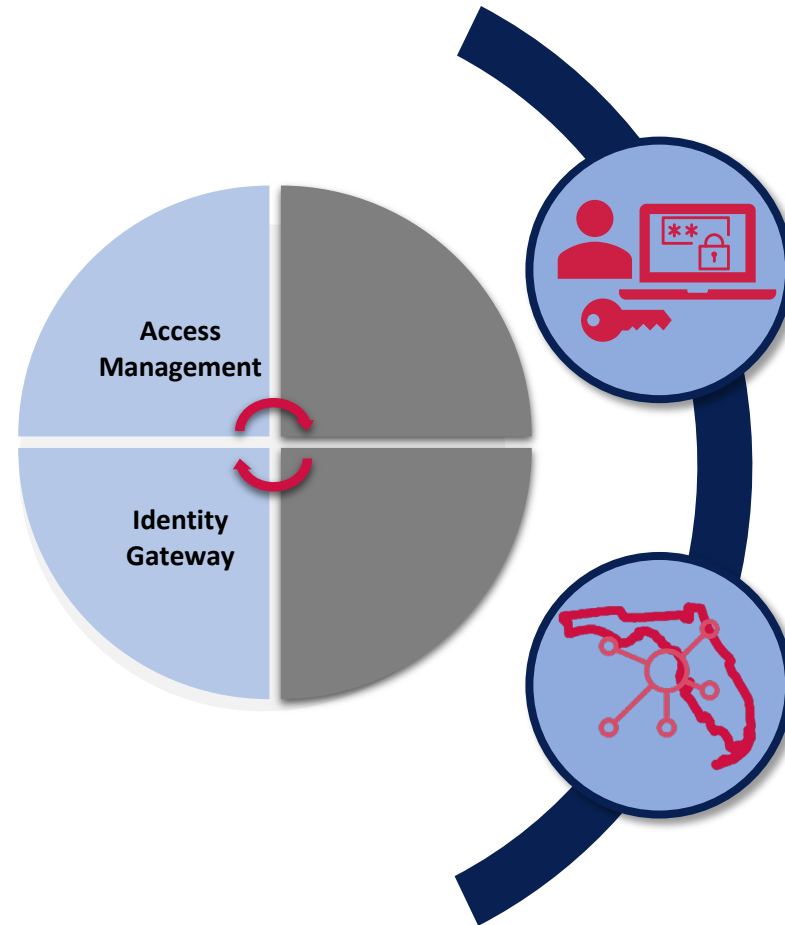
Access Management (AM) & Identity Gateway (IG)

The **Access Management (AM)** is the overall engine that produces and manages the authentication and authorization functions of the platform. The AM has the following main features:

- Centralizes the management of authentication and authorization processes
- Evaluates constraints of global and application-specific requirements
- Enables communication of common Security Frameworks

The **Identity Gateway (IG)** serves as a front-door to the Access Management services and can act as a Policy Enforcement Point for applications. The IG has the following main features:

- Provides hypertext transfer protocol level protection both for internal and external traffic
- Allows for complex logic to be configured when integrating with applications.
- Acts as a central point of ingress to the AM component



ACCESS MANAGEMENT

- Policy Administration
- Authentication
- Authorization
- Privileged Access Management

FEDERATION

- Policy Alignment
- Authentication Broker
- Attribute Exchange

IS/IP Implementation: WS-C Overview

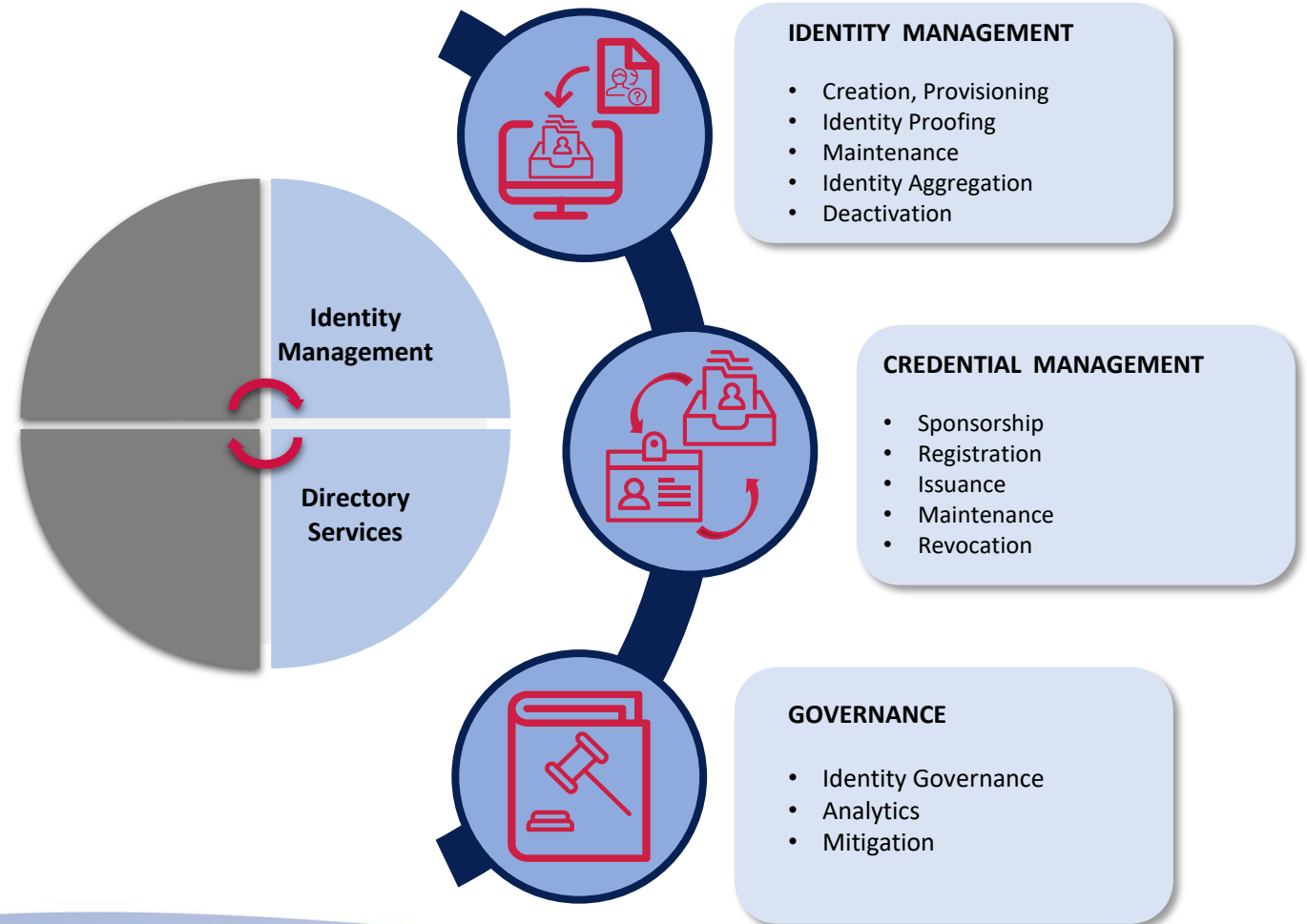
Identity Management (IDM) & Directory Services (DS)

The **Identity Management (IDM)** manages user profiles and automates the identity lifecycle from one central location. The IDM has the following main features:

- Synchronizes data across multiple resources
- Provides workflow configuration for managing how users sign up for their accounts
- Provides users with self-service capabilities, including updating attributes and new user registration









The **Directory Services (DS)** is the directory that provides services to other ForgeRock components and data storage. The DS has the following main features:

- Provides Core Token Service (CTS) storage for access and authentication
- Provides User Store (USR) storage
- Provides Configuration (CNF) storage
- Delegates authentication to another directory services providers and directories, if desired



IS/IP Implementation: WS-C Overview

Upcoming Major Deliverable – Production Readiness Checklist

	Production Readiness Discipline Area	% of Activities Complete	% Go or Conditional Go	# of readiness items	# with Go Decision	# with Conditional Go Decision
	General Readiness and Project Management	100%	100%	11	11	0
	Technical Infrastructure	100%	100%	6	6	0
	Testing	100%	100%	8	7	1
	User Provisioning	75%	100%	4	3	1
	Training and OCM	100%	100%	8	8	0
	Post Implementation Support / Readiness	100%	100%	7	7	0
	Operational Readiness	100%	100%	2	2	0
	Final Readiness Sign Off	0%	100%	1	0	0
	Total	84%	100%	47	45	2

Example



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Open Discussion

Mike Magnuson, FX Director





Upcoming Activities & Closing Remarks

Shevaun Harris, Acting Secretary & FX Executive Sponsor

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FX Program

Upcoming Activities

- Next meeting dates for 2021 and anticipated topics:
 - January 15th – voting action required
 - IS/IP DDI: WS-C Deliverable – demonstration and approval
 - EDW Update
 - February 19th
 - Quarter 4 Budget Amendment



Visit Our Website

ahca.myflorida.com/medicaid/FX



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FX Governance

Florida Health Care Connections (FX) Governance is organized into a two-tiered structure with specific roles and responsibilities delegated to each tier. The first tier consists of the Project Execution Layer, which has three components: FX Implementation Team, the Module Procurement Project Teams (overseen by the FX EPMO), and FX Program Administration. The FX Project Execution Layer has the responsibility for the prioritization of FX procurements, MITA compliance, and tactical support of active FX projects. The second tier consists of the Program Oversight Layer, which includes the FX Executive Steering Committee (FX ESC) with input from FX Program Administration and the Executive Office of the Governor (EOG) Workgroup on Data Sharing and Interoperability. The ESC is comprised of 15 members from multiple State of Florida agencies. More information can be found in the [FX Governance Plan \(5-1\)](#).

Executive Steering Committee Meetings

Materials from the FX ESC meetings will be posted below. These materials may include presentations, meeting minutes, and other documents used or referenced during the committee meetings. Materials are organized chronologically with the most recent event. Select the meeting date below to view associated documents and information. Note: All meeting notices are published in the [Florida Administrative Register](#).

> Fiscal Year 2020-2021

Department of Children and Families

- Assistant Secretary for Economic Self-Sufficiency Committee Member
- Assistant Secretary for Child Welfare Committee Member

Department of Health

- Department Representative Committee Member

Department of Financial Services

- State's Financial Processing Experienced Committee Member

Agency for Persons with Disabilities

- Medicare & Medicaid Waiver Experienced Committee Member

Department of Elder Affairs

- Medicaid Experienced Committee Member

Department of Management Services

- State Chief Information Officer Committee Member

Agency for Health Care Administration

- Chair Secretary or Executive Sponsor Committee Member
- Medicaid Division Committee Member
- Medicaid Division Committee Member
- Health Quality Assurance Committee Member
- Florida Center for Health Information & Transparency Committee Member
- Chief Information Officer Committee Member
- Operations Committee Member
- Florida Healthy Kids Corporation
- FHRC Representative Committee Member

FLORIDA HEALTH CARE CONNECTIONS

Executive Steering Committee



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Appendix



FX Program Timeline

As of 12/3/2020

Dates shown for future projects are approximate and expected to change.

Legend:

Not Started/Future Project

% Complete

Project Duration*

Baseline Duration



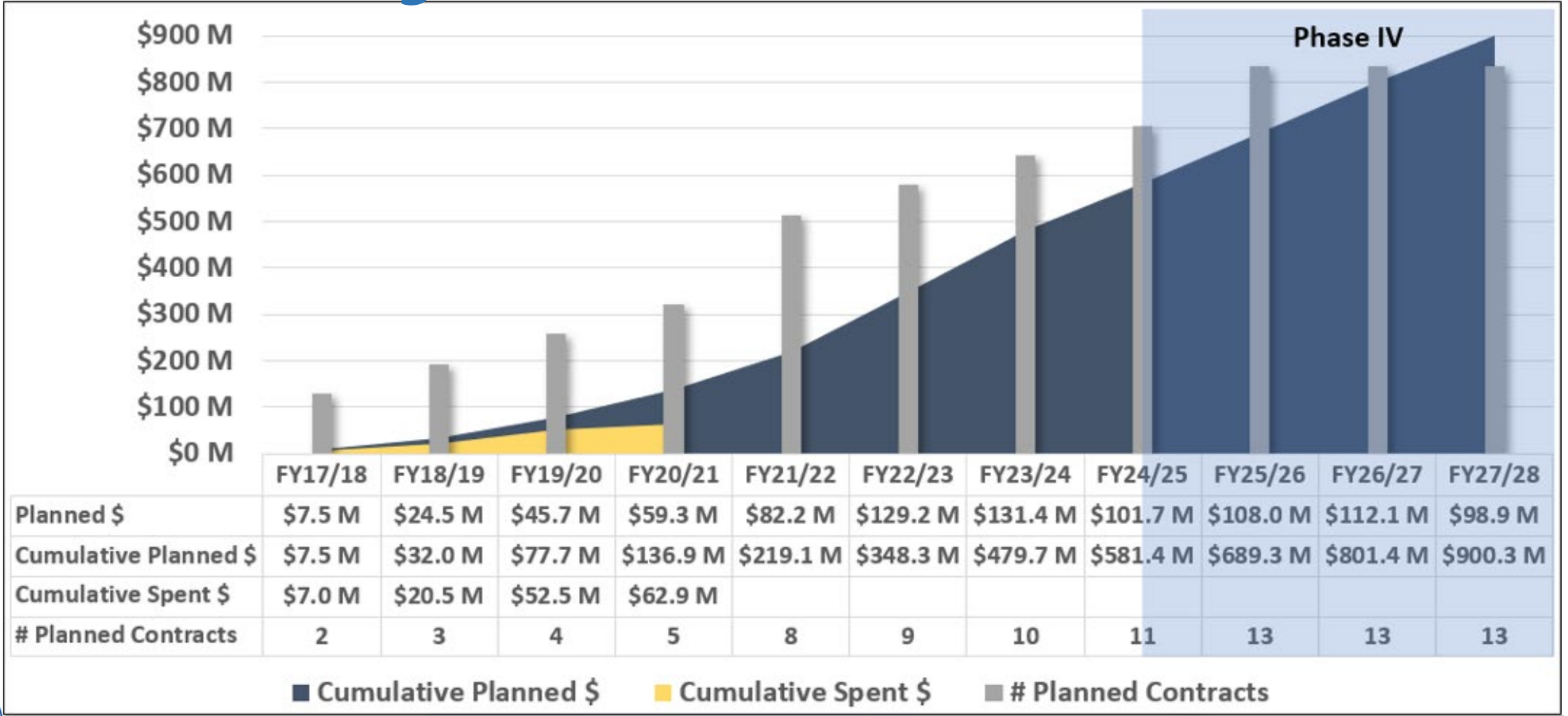
Projects	Start Date	Est. Finish	2019		2020				2021				2022				2023				2024					
			Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
Enterprise Data Warehouse - Procurement	3/28/2018	2/1/2021																								
Provider System and Technology Module - Procurement	8/9/2019	12/30/2021																								
Integration Services/Integration Platform - Implementation	11/14/2019	3/2/2021																								
Core Planning Unified Operations - Planning	3/19/2020	10/1/2020																								
Single Source Credentialing Planning Project	9/9/2020	3/4/2021																								
Unified Operations Center - Procurement	9/9/2020	3/3/2022																								
Core Technology - Procurement	2/1/2021	12/30/2021																								
Enterprise Data Warehouse - Implementation	2/1/2021	2/1/2023																								
Module Integration	7/1/2021	8/5/2024																								
Core Technology - Implementation	1/4/2022	8/30/2024																								
Provider System and Technology Module - Implementation	1/4/2022	10/31/2022																								
Unified Operations Center - Implementation	3/4/2022	9/30/2024																								
Recipient - Procurement	8/1/2022	3/31/2023																								
Pharmacy Benefits Management Module - Planning	4/3/2023	6/30/2023																								
Recipient - Implementation	4/3/2023	10/31/2023																								
Pharmacy Benefits Management Module - Procurement	7/3/2023	12/29/2023																								
Pharmacy Benefits Management Module - Implementation	1/2/2024	10/31/2024																								

Note: Years and quarters displayed are *calendar* not *state fiscal* (Calendar Q3 = SFY Q1)

*Projects without established schedules are depicted solely with light-blue

FX Program Updates

Cumulative Funding Estimates with Planned Contracts



FY 17/18 to FY 20/21 – reflects Appropriated funding
 FY 21/22 – reflects IAPD as of 9/2020
 FY 22/23 to FY 27/28 – reflects estimated funding

Cumulative Spent includes payments made through November 30, 2020
 A vendor may be awarded multiple contracts



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FX Program Updates

Budget as of 11/30/2020 – FY 2020/2021

	Category	Final Appropriation (7/1/2020)	Contracted (Encumbrance)	Incurred
Phase 1	SEAS	\$9,710,400	\$9,710,400	\$4,266,230
	IV&V	\$3,230,996	\$3,230,851	\$990,660
Phase 2	IS/IP - Implementation	\$6,363,460	\$6,363,460	\$2,371,016
	IS/IP - Operations	\$4,503,602	\$4,503,602	\$1,125,901
	EDW - Implementation	\$30,252,168	-	-
	EDW - Data Governance	\$240,232	\$222,000	\$53,280
	EDW - Legal Fees/Court Reporter	\$230,000	\$230,000	\$84,991
Phase 3	Core - Procurement	\$1,400,800	\$500,000	\$193,540
	Provider - Procurement	\$150,000	-	-
	FMMIS Support	\$3,194,400	\$3,194,400	\$1,349,649
Total		\$59,276,058	\$27,954,713	\$10,435,267

