

**NYS OMH IV&V for EMR RFP Glossary of Defined Terms**

<b>Term or Acronym</b>	<b>Definition</b>
Additional Deliverables	Deliverables not set forth in the EMR RFP.
Additional Functionality	The agreed upon functionality, that is not already included in the Requirements Traceability Matrix at the time this RFP is issued, which the Contractor will build or integrate to add to the Base VistA Solution or the OMH VistA Solution.
Agile Software Development Methodologies	A group of software development methodologies based on iterative and incremental development, where requirements and solutions evolve through collaboration between self-organizing, cross-functional teams.
As Is VistA Solution	The EMR Bidder's VistA product as it exists at the time of submission of the Bid. By definition, each Bidders' As Is Vista Solution will include all Core Functions which that Bidder has indicated on the Requirements Traceability Matrix are met by its existing VistA product (i.e., executable object code immediately available to OMH).
Base Contract Term	The term of the initial IV&V for EMR Contract.
Base VistA Solution	The Vista solution to be implemented in the Track 1 Implementation of the VistA CPOE, CPRS, BCMA, and Pharmacy modules, comprised of that portion of the As-Is VistA Solution that includes the Core Functions requested by OMH for Track 1 implementation.
BCMA	Bar Code Medication Administration. A barcode system designed to prevent medication errors in hospitals. It consists of a barcode reader, a portable computer with wireless connection, a computer server, and software.
Best Value	The basis for awarding a contract which optimizes quality, cost, and efficiency among responsible and responsive Bidders
Bid	Complete proposal (submitted in competition with other bidders) to execute specified job(s) within prescribed time, and not exceeding a proposed amount (that usually includes labor, equipment, and materials). The bid-receiving party may reject the bid, make a counter offer, or turn it into a binding contract by accepting it.
Bid Documents	This RFP and all attachments and exhibits referenced therein.
Bid Proposal	A Bidder's Financial Proposal, Technical Proposal and Administrative Documents.
Bid Submission Package	The envelopes or mailers that contain a complete set the Bidder's Bid Proposal documents.
Bidder	An entity which has submitted a Bid/Bid Proposal.
Bidder Experience	The mandatory Bidder Experience set forth in RFP Section 4.1 Mandatory Minimum Firm Qualifications.
BS	Bachelor of Science
CBO	Consolidated Business Office
Central Office	The OMH Central Office, located at 44 Holland Avenue in Albany, NY .
Cerner	Cerner Laboratory Information System. Healthcare Information Technology that assists in the processing of laboratory orders.
Change Management	An approach for transitioning individuals or organizations from a current state to a desired future state.

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Change Requests	System modification requests that are made after requirements have been finalized and accepted.
Change Request Management	An approach for requesting and approving changes to accepted project requirements or scope
CIO	Chief Information Officer. The head of an organization's Information Technology unit.
CIT	Shortened acronym for the Center for Information Technology. The OMH's IT organization.
Clinic	Clinic is the most common type of OMH Outpatient program. They are licensed under NY Rules and Regulations part 599. Each OMH Hospital has one or more clinic locations attached to it.
Clinical Advisory Committee	Clinical advisors that review and approve the clinical strategy for the EMR program, prescribe best practices, and review and approve the standard clinical processes.
Commissioner	An officer having charge of some department or bureau of the public service. The current OMH Commissioner is Michael F. Hogan, PhD.
Contract	The agreement between OMH and the Contractor/Successful Bidder resulting from this IV&V RFP which is approved by OAG and OSC.
Contract Approval Date	The date upon which OSC approves the Contract.
Contract Period	The number of working days or calendar days (may also be expressed in months or years), from a specified commencement date to a specified completion date, as provided for in a contract. The Contract Period of the OMH IV&V for EMR project is four (4) years to run concurrent with the EMR Project.
Contracted Services	Those services, as set forth in the IV&V for EMR RFP Section 3.2 Contracted Services, to be provided by the Contractor pursuant to the resulting Contract.
Contractor or Successful Bidder	The Bidder that is awarded the Contract to perform IV&V services.
Core Functions	The baseline set of OMH EMR Requirements as of the date the EMR Project begins. The functions set forth in the OMH EMR RFP Requirements Traceability Matrix in Exhibit 17 of the OMH EMR RFP.
CPC	Children's Psychiatric Center
CPOE	Computerized Physician Order Entry. Part of the base OMH VistA solution. A process of electronic entry of medical practitioner instructions for the treatment of patients under his or her care. The orders are communicated over a computer network to the medical staff or to the departments (pharmacy, laboratory or radiology) responsible for fulfilling the order
CSM	Certified Scrum Master
Daily Scrum	A daily meeting, attended by all project team members, in which each member is asked the following three questions: <ol style="list-style-type: none"> <li>1. What did you do yesterday?</li> <li>2. What will you do today?</li> <li>3. Are there any impediments in your way?</li> </ol>

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Data Governance	A system of decision rights and accountabilities for information-related processes, executed according to agreed-upon models which describe who can take what actions with what information, and when, under what circumstances, using what methods.
Data Stewardship	Ensuring that an organization's data is complete, high quality, and accurate by analyzing the data for duplicates, errors, and missing information; the tasks involved in carrying out an organization's data governance policy.
Design Deliverables	Described in EMR <i>RFP Section 4.11.3 Design Deliverables</i> . Documents that define how to construct or operate the Infrastructure, User Interface, Data Migration, Data Interfaces, Reports, and Full Functionality of the EMR, along with materials to be distributed for review either prior to and/or after meetings concerning the Preliminary Design, Critical Design, and Production Review.
Development Deliverables	Described in EMR <i>RFP Section 4.11.4 Development Deliverables</i> . These include: the System Development Plan, Configuration Management Plan, Release Management Plan, and Code Documentation and Instructions.
Draft IV&V for EMR Project Plan	A sample Project Plan created by bidders to demonstrate their understanding of the EMR Project and the IV&V services required for the EMR Project.
EA	Enterprise Architecture
EEO	Equal employment opportunities for minority group members and women
EHR	<p>Electronic Health Record. Health information about individual patients or populations in a digital format capable of being shared across different health care settings, by being embedded in network-connected enterprise-wide information systems. Records may include demographics, medical history, medication and allergies, immunization status, laboratory test results, radiology images, vital signs, personal stats like age and weight, and billing information.</p> <p>An EHR may sometimes be differentiated from an EMR if defined as "longitudinal record of a patient's care carried out across different institutions and sectors" and an EMR is defined as "a record of care provided by a single site"</p>
Electronic Medical Record	Local computerized records, in a specific health-care organization, of each patient's health history. Electronic medical records tend to be a part of a local stand-alone health information system that allows storage, retrieval and modification of records. Sometimes used interchangeably with the term "EHR."
EMR	In the context of this RFP, 'EMR' is used to denote an Electronic Medical Records System, a computerized Health Information System that stores Electronic Medical Records and enables technologies such as Decision Support Systems to be integrated into Clinical workflow.
EMR Contract	The agreement between OMH and the Contractor/Successful Bidder resulting from the EMR RFP which is approved by OAG and OSC.
EMR Contractor	The Bidder that is awarded the EMR Contract.

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Term or Acronym	Definition
EMR Operating Committee	OMH Clinical, IT and Financial personnel that develop and maintain the EMR roadmap based on the EMR strategy, develop the high level work plan and milestones, realize resource allocation for EMR program and meet bi-weekly or more frequently to monitor program progress.
EMR Project	For the purpose of this RFP, the EMR Project is defined as “The temporary endeavor to create the OMH Electronic Medical Records system and implement it throughout all of the OMH facilities, Outpatient locations, and Central Office.”
EMR Project Deliverables	The list of deliverables for the entire EMR Project; set forth largely as <a href="#">Attachment S: OMH EMR Project Deliverables</a> (EMR RFP Section 4.11)
EMR Requirements	The business, functional and technical requirements which comprise the totality of all requirements set forth in the EMR RFP Exhibit 17 “Requirements Traceability Matrix”, plus Additional Functionality to be added to the Core Requirements throughout the EMR project.
EMR RFP	The Electronic Medical Records System Request for Proposal released by the OMH on December 16, 2011, available at: <a href="http://omh.ny.gov/omhweb/rfp/2011/emr/">http://omh.ny.gov/omhweb/rfp/2011/emr/</a>
Enhancements	The Additional Functionality and Additional Deliverables of the EMR project.
Enterprise Assessment Plan	A plan that details the contractor’s proposed methodology for validating the proposed solution against OMH EMR requirements as stated by the OMH staff at the Central Office and proposed implementation sites. Once the EA plan has been executed, the OMH PM and the Contractor PM will agree on the final system configuration, the detailed implementation plan ( <b>Deliverable 38</b> ) with specific project milestones, resource requirements, schedule for system testing, and training plan ( <b>Deliverable 36</b> ).
EST	Eastern Standard Time
Executive Presentation	A Bidder’s presentation, focusing on the Bidder’s experience, strategy, and overall approach to providing the services required of the IV & V Project as described in RFP Section 6.7 Technical Proposal Part 3 (10 Points).
Facility	Refers to one of the 25* OMH hospitals. They are mental health facilities that provide temporary or permanent care of NYS residents who, as a result of a psychological disorder, require routine assistance, treatment, or a specialized and controlled environment. A listing of OMH facilities is available online at: <a href="http://www.omh.state.ny.us/omhweb/aboutomh/omh_facility.html">http://www.omh.state.ny.us/omhweb/aboutomh/omh_facility.html</a>  (* at the time of writing)

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Failed Reference Call	<p>Bidder will receive a “Fail” rating on a Bidder Reference Check call if the person contacted as a reference:</p> <ul style="list-style-type: none"> <li>• cannot or will not confirm that the Bidder’s firm performed project work during the time periods and in the roles as claimed OR</li> <li>• confirms that the Bidder’s firm worked on the project during the time periods and in the roles as claimed, but cannot or will not rate their performance as “satisfactory” or better.</li> </ul> <p>Bidder will receive a “Fail” rating on a Key Staff reference call if the person contacted as a reference:</p> <ul style="list-style-type: none"> <li>• cannot or will not confirm that the proposed key staff worked on the project during the time periods and in the roles as claimed OR</li> <li>• confirms that the proposed key staff worked on the project during the time periods and in the roles as claimed, but cannot or will not rate their performance as “satisfactory” or better</li> </ul>
Final Composite Score	A Bidder’s combined Financial Score and Technical Score.
Financial Score	The evaluation score for a Bidder’s Financial Proposal.
FOIL	Freedom of Information Law
HIPAA	Health Information Portability and Accountability Act
HIPAA Privacy Rule	<p>The Privacy Rule requires health plans, most health care providers and health care clearinghouses to comply with the Office for Civil Rights of the Department of Health and Human Services’ (HHS) <i>Standards for Privacy of Individually Identifiable Health Information</i>. The main goal is: “...to assure that individuals’ health information is properly protected while allowing the flow of health information needed to provide and promote high quality health care and to protect the public’s health and well being.”</p> <p>Reference:  <a href="http://www.hhs.gov/ocr/privacy/hipaa/understanding/summary/privacysummary.pdf">http://www.hhs.gov/ocr/privacy/hipaa/understanding/summary/privacysummary.pdf</a> ↗</p>
HIPAA Security Rule	<p>This rule specifies a series of administrative, technical, and physical security procedures for covered entities to use to assure the confidentiality of electronic protected health information. The standards are delineated into either required or addressable implementation specifications.</p> <p>Reference:  <a href="http://www.hhs.gov/ocr/privacy/hipaa/understanding/srsummary.html">http://www.hhs.gov/ocr/privacy/hipaa/understanding/srsummary.html</a> ↗</p>
Hourly Rate	The IV&V Contractor’s flat rate cost per hour to carry out the proposed IV&V Contracted Services and produce the proposed Work Products.
Implementation	In the context of the EMR RFP, implementation means the installation, configuration, customization, training, data migration and operational support of either the Base VistA Solution, or of the entire OMH VistA Solution
Issue / Problem Tracking / Resolution Methodology	A mechanism for organizing, maintaining, and tracking the resolution of issues that cannot be resolved at the “individual” level.
IT	Information Technology

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IV & V	Independent Verification and Validation. The process of a disinterested third party checking that a product, service, or system meets specifications and fulfills its intended purpose.
IV & V Work Products	The list of items resulting from the performance of the IV & V Contracted Services set forth as Section 3.3 of the OMH IV&V for EMR RFP.
Key Personnel	Those individuals identified by a Bidder to perform the staff roles described in RFP Section 4.2.
Key Staff	Those individuals identified by a Bidder to perform the staff roles described in RFP Section 4.2.1 IV&V Project manager and 4.2.2 IV&V Quality Assurance Manager.
Key Staff Experience	The Key Staff mandatory experience set forth in RFP Sections 4.2.1 IV&V Project Manager, 4.2.2 IV&V Quality Assurance Manager, and Attachment S.
Key Staff Interview(s)	The interviews of Key Staff as described in RFP Section 6.8.5 Level 5 – Key Staff Interviews (15 Points)
Knowledge Transfer (KT)	The exchange of written or electronic information pertaining to the EMR's usage, maintenance, development, troubleshooting or other relevant system-related concerns. Any knowledge of the system that is required for the OMH to operate, maintain, repair, or upgrade the EMR with or without the Vendor present shall be transferred to the OMH.
Mandatory Experience	Required Key Staff Experience and Bidder Experience that a Bidder must possess to be considered as qualified to Bid on the IV&V for EMR RFP.
Medical Record	Record of each of the individual actions that make up the diagnosis, treatment and care of a patient. Actions may include: A request or order for a test, a report of the test result, a diagnosis based on test results, or a treatment based on a diagnosis
Methodology	A set of procedures, methods, or rules employed by a discipline such as Project Management or Quality Management.
Minimum Weekly Hours	A minimum of 30 hours per week per key staff position, on-site at the OMH Central Office, EMR Implementation Site, or other project work sites as necessary
MS	Microsoft
MWBE	Minority and Women Owned Business Enterprise
NYCRR	New York Codes, Rules and Regulations.
NYS	New York State
OAG	The Office of the Attorney General of New York
OSC	The Office of the State Comptroller of New York
OFT	Office for Technology
OMH EMR Project Team	Includes all full-time and part-time contractor or OMH staff assigned full-time and part-time resources assigned to work on the deliverables of the OMH EMR project, who will help achieve the project objectives.

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Term or Acronym	Definition
OMH EMR Steering Committee	Key project stakeholders responsible for reviewing progress and status of project activities. May include additional parties such as: <ul style="list-style-type: none"> <li>• OMH Medical Director</li> <li>• Office of Consumer Affairs</li> <li>• Division of Adult Services</li> <li>• Division of Children and Family Services</li> <li>• Division of Forensic Services</li> <li>• Office of Quality Management</li> <li>• Evidence-based Medicine &amp; Clinical Guidelines</li> <li>• Health Services</li> </ul>
OMH Facility	New York State Operated Psychiatric Centers. OMH Facilities number 25 at the time of this writing.
OMH Locations	All OMH Facilities, Outpatient Locations and the Central Office.
OP	Outpatient. (sometimes written O/P) A patient who is not hospitalized for 24 hours or more but who visits a hospital, clinic, or associated facility for diagnosis or treatment.
OMH	Office of Mental Health
OMH EMR	The OMH customized VistA application consisting of all Core Functions plus any Additional Functionality or Enhancements.
OMH VistA Solution	The OMH customized VistA application consisting of the Core Functions in the Base VistA Solution, plus any remaining Core Functions not delivered in the Track 1 Implementation, and any Additional Functionality or Enhancements.
OMH EMR Glossary	Exhibit 18 of the OMH EMR RFP
OSC	Office of State Comptroller
Outpatient Locations	Approximately 310 sites, each one affiliated with an OMH facility, which provides mental health services on an Outpatient basis.
PC	Psychiatric Centers including associated outpatient clinics
PDF	Portable Document Format
Performance Requirements	The level at which the Base VistA Solution or OMH VistA Solution shall perform, which may include, but not be limited to, response times, system availability, data integrity and data security. Categories of Performance Requirements shall be defined during contract negotiations.
Pilot	An initial implementation or implementations, performed at a small, selected number of facilities or sites, to evaluate the proposed solution before rolling out the application to the remaining locations
PMP	Project Management Professional , as certified by the Project Management Institute (PMI)
Preliminary Proposal Score(s)	The combined score of the Technical Proposal Part 1 Score and the Financial Proposal score without the inclusion of the score attributable to the Executive Presentation.
Preliminary Technical Evaluation Score	The Technical Proposals Part 1 Score without inclusion of the score attributable to the Bidder's Executive Presentation.

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Project Management	The application of knowledge, skills and techniques to execute projects effectively and efficiently. It's a strategic competency for organizations, enabling them to tie project results to business goals — and thus, better compete in their markets. (source: Project Management Institute)
Proposal Due Date	The date and time upon which Bid Proposals are required to be submitted to OMH in order to be considered for evaluation. The Due Date for the IV&V for EMR Proposal is Friday, 6/1/12.
Proprietary	Protected by secrecy, patent, copyright or trademark against commercial competition.
Quality	The degree to which a set of inherent characteristics meets its requirements.
Quality Assurance (QA)	Review quality requirements, test plans and results from quality control measurements to ensure appropriate quality standards and definitions are in place.
Quality Audits	Periodic, independent, and documented examination and verification of activities, records, processes, and other elements of a quality system to determine their conformity with the requirements of a quality standard.
Quality Control (QC)	Monitor and participate in execution of quality activities (e.g., User Acceptance Tests), assess performance record results and recommend changes.
QA Environment	A Quality Assurance environment, a non-production instance of the application for the purpose of allowing testers to monitor and evaluate the software.
Quality Management	The four main components of Quality Management are: Quality Planning, Quality Assurance and Quality Control and Quality Improvement.
Quality Management Methodology (Quality Management Processes)	The proposed methodology or processes needed to perform Quality Assurance and Quality Control.
Quality Planning	Documentation and specification of resources and procedures for ensuring consistent quality for a product or project, i.e., the OMH EMR project.
Reference Checks	A call placed to a reference provided by a Bidder or subcontractor for the purposes of verifying the proposed personnel's work experience.
Retention Plan	A plan that details the methods used to retain employees
Requirements	The characteristics or features, related to identified business needs or opportunities, which define the system. They can be broadly divided into three main categories: Business Requirements, Functional Requirements, Technical Requirements.
Requirements Management Tool	A commercially available application, (e.g. HP Quality Center) where project Requirements are to be stored and then used in the creation of User Acceptance Test plans to confirm whether the Requirements are met.
Requirements Traceability Matrix	The matrix set forth in EMR RFP Exhibit 17 which contains the Core Functions.

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<b>Term or Acronym</b>	<b>Definition</b>
RFP	This Request for Proposal entitled “Request for Proposals for Independent Validation and Verification (“IV&V”) for EMR Implementation” and any attachments/exhibits referenced therein.
RFP Release Date	The date upon which this RFP solicitation is published in the New York State Contract Reporter.
Risk Management Methodology	A process for the identification, assessment, and prioritization of risks (defined in ISO 31000 as the effect of uncertainty on objectives, whether positive or negative) followed by coordinated and economical application of resources to minimize, monitor, and control the probability and/or impact of unfortunate events or to maximize the realization of opportunities.
Site	A site is a distinct physical location where a program unit provides mental health services. Licensed program units may operate a main site and one or more satellites. Distinct physical location may depend on whether the <i>program type or model is one</i> where staff persons primarily provide services at the unit location or staff persons primarily leave the program office to provide services “in the field.”
SDLC	Software Development Lifecycle
SOMTA	Sex Offender Management and Treatment Act. A NYS law that authorizes placement of the most dangerous sex offenders in a secure treatment facility operated by the Office of Mental Health (OMH).
TBD	To Be Determined
Technical Score	(maximum of 70 points) The evaluation score for a Bidder’s Technical Proposal, or the sum of: <ul style="list-style-type: none"> <li>• the Technical Score Part 1 (maximum of 35 points): the score for the Bidder’s (written) Scope of Services and Work Approach.</li> <li>• the Technical Score Part 2 (maximum of 15 points): the score for the two Key Staff Interviews</li> <li>• the Technical Score Part 3 (maximum of 10 points): the score for the Bidder’s Executive Presentation. Bidders must first receive a rating of “Pass” on the Bidder and Key Staff Reference Checks and have a Preliminary Proposal Score that is within 10 points of the top Preliminary Proposal Score in order to be invited for an Executive Presentation.</li> </ul>
TCP/IP	Transmission Control Protocol/Internet Protocol
Total Cost	The sum of the IV&V Project Manager’s hourly rate times 6,000 hours plus the IV&V Quality Assurance Manager’s hourly rate times 6,000 Hours
Track	The OMH envisions the Implementation phase of the OMH EMR Project to proceed along two related tracks: Track 1 will implement the Base VistA to selected users at 26 facilities and track 2 will implement the custom OMH VistA solution to all users at all facilities and associated outpatient locations.
Training Materials	Printed and electronic instructional materials for operating, maintaining, and administering the Base VistA EMR and the OMH VistA EMR systems. See: EMR RFP section 4.11.6 Training Deliverables.
VA	Veterans Administration
VA VistA	See: VistA

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VistA	Veterans Health Information Systems and Technology Architecture. An enterprise-wide information system built around an electronic health record, used throughout the United States Department of Veterans Affairs (VA) medical system.
VistA Infrastructure	The hardware, software, and network components required to operate the Base VistA or OMH VistA solutions.
WBE	Women Owned Business Enterprise