REQUEST FOR PROPOSALS

RFP-PS-2025-2026-018-VITAL RECORDS-DEM REG

COMPREHENSIVE ELECTRONIC VITAL RECORDS SYSTEM OF THE DEMOGRAPHIC REGISTRY OF THE PUERTO RICO DEPARTMENT OF HEALTH

PUBLICATION DATE

Tuesday, December 09, 2025

DEADLINE FOR SUBMITTING QUESTIONS

On or before Tuesday, December 16, 2025, at 2:00 p.m.

subastas@salud.pr.gov

DEADLINE FOR ANSWERING QUESTIONS

On or before Thursday, December 18, 2025, at 5:00 p.m.

DEADLINE FOR SUBMISSION OF THE PROPOSAL

On or before Thursday, January 08, 2026, at 2:00 p.m.

In San Juan, Puerto Rico on Tuesday, December 09, 2025,

Carlos A. Padilla Cruz

Interim Manager

Auction Support Section

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1. INTRODUCTION TO THE REQUEST FOR PROPOSAL

1.1. Legal Basis

Pursuant to Act No. 81 of March 14, 1912, as amended; Act No. 237 of August 31, 2004, as amended; Administrative Bulletin No. OE-2021-029 of April 27, 2024; Administrative Order 2023-581 of December 21, 2023, as amended; and any other applicable and current laws, orders, memoranda, and/or administrative bulletins, the requirements for the Request for Proposals (RFP) are hereby established as of the date of publication.

1.2. Overview

To the extent that this Request for Proposal (RFP) involves the use, in whole or in part, of federal and state funds, the signature of the Contractor's authorized representative on the first page of this document indicates compliance with the Certifications contained in **Attachment A**, which is incorporated by reference and made part of this RFP as if fully set forth herein**.**

After the award, unless otherwise stated in this contract, the Contractor shall use the following information for any correspondence regarding these proposals:

Carlos A. Padilla Cruz, BSA/BSM, MBA
Interim Manager
Auction Administrative Support Section
Email: subastas@salud.pr.gov, **Contact Number:** 787-765-2929, ext. 3450

1.3. Purpose of the Request for Proposal (RFP)

The Puerto Rico Department of Health, Demographic Registry, issues this Request for Proposal (RFP) to solicit proposals from qualified vendors for the acquisition and implementation of an Electronic Vital Record System (EVRS). This initiative will be funded in whole or in part, by state and federal funds.

The Demographic Registry recognizes the critical need to transition from traditional paper-based processes to an efficient, secure, and modern electronic solution for the management of vital records. The EVRS will serve as a comprehensive platform designed to securely store, manage, and process essential records such as birth certificates, death certificates, marriage licenses, marriage certificates, and other related documents associated to an individuals' life events electronically.

Implementing an EVRS requires a deep understanding of the unique requirements, regulations and best practices related to vital records management. Accordingly, this RFP seeks to identify a vendor with the proven capacity to deliver a compliant and high-quality solution.

Objectives of this RFP are as follows:

1. Modernization and Efficiency: Facilitate the transition from paper-based records to a fully electronic system, reducing reliance on physical documentation and improving overall operational efficiency.
2. Accuracy and Data Integrity: Ensure data accuracy through the implementation of validation mechanisms and data quality controls that minimize errors and discrepancies.
3. Compliance and Security: Meet federal and state regulations and industry standards regarding data security, privacy, and confidentiality, safeguarding personal and sensitive information against unauthorized access, loss, or misuse.
4. Integration and Interoperability: Enable seamless integration with existing systems and platforms, to ensure interoperability with relevant stakeholders.
5. Fiscal Responsibility: Promote cost-effectiveness in the implementation and maintenance of the EVRS, maximizing the efficient use of federal and state resources allocated for this initiative.
6. Compliance with National Center for Health Statistics (NCHS) standards: Ensure alignment with NCHS set standards for data collection, record management, and vital statistics reporting. Compliance with NCHS standards will guarantee that the EVRS

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adheres to national best practices, supports interoperability, and enables seamless data exchange with other jurisdictions and systems nationwide.

By issuing this RFP, the Demographic Registry seeks proposals from vendors with experience working with state or federal government agencies in the development and deployment of data driven operational systems across multiple stakeholder groups, within defined timeliness and budgets.

The selected vendor must demonstrate a comprehensive understanding of NCHS guidelines and the capability to implement the EVRS in full compliance with these standards, including those governing data format, terminology, coding systems, record structure, and FHIR (Fast Healthcare Interoperability Resources) requirements.

The selected vendor will be responsible for the implementation of a fully enabled web-based system, including data conversion, user training, ongoing application maintenance and technical support, in accordance with all applicable funding and reporting requirements tied to federal and state funding sources.

The system will be housed in the Azure Puerto Rico.Gov Cloud. The vendor will be responsible for maintaining the application, while Puerto Rico will maintain ownership and management of the server infrastructure.

1.4. Period of Performance

Services must begin during the fiscal year 2026 which began on July 1st, 2025, which is subject to formalization of an agreement between the Puerto Rico Department of Health and the selected vendor. The initial contract period is for one year and will begin with Phase 1, as indicated in the Scope of Work, and may be renewed annually based on availability of funds and satisfactory performance of the contractor. The contract period and renewal will be in accordance with the completion of the Phases described in the Scope of Work.

1.5. RFP Process Schedule

Release Date:	12/09/2025, until 4:00 pm, AST
Deadline for Submitting Questions:	12/16/2026, at 2:00 p.m., AST
Proposals due by:	1/08/2026, at 2:00 p.m., AST
Demonstrations (tentative):	1/12/2026 to 1/16/2026

1.6. RFP Communications

Vendors are required to contact the designated **Solicitation Coordinator, Carlos Padilla Cruz,** for all communications related to this RFP. All communication regarding this solicitation should be directed exclusively to the provided email address with the following subject line:

E-MAIL: subastas@salud.pr.gov

Subject: Registro Demografico – RFP-PS-2025-2026-018-VITAL RECORDS-DEM REG

It is the Vendor's responsibility to submit any questions, requests for clarifications regarding this RFP, particularly if the Vendor believes that any language, specifications, or requirements are ambiguous or contradictory, no later than the **question submission deadline** detailed in **Section 1.5: RFP Process Schedule**. All questions and comments must be sent to the Solicitation Coordinator's email address listed above.

Unauthorized contact with any other personnel of the Puerto Rico Department of Health (DOH) concerning this RFP may result in disqualification from consideration for award.

Puerto Rico DOH will make reasonable efforts to ensure that each Vendor receives an adequate and timely response to submitted questions. Following DOH's review of all inquiries, if the Department determines that changes or clarifications are warranted, such modifications will be issued through an official addendum to this RFP.

If no addendum is issued, it shall be understood that the questions and issues raised were reviewed but did not necessitate any modification or clarification. All Vendors will be notified

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of any change to the RFP's language, specifications, or requirements by a formal addendum issued by the Puerto Rico DOH.

1.7. Proposal Submission Instructions

Proposals are required to be submitted by each Vendor in two (2) distinct parts: Technical and Cost; no later than the submission deadline time and date detailed in section **1.5: RFP Process Schedule**. **The Puerto Rico DOH will not accept late submissions**, and a failure to submit a complete response by the deadline will result in disqualification.

The Technical Proposal must not contain any cost or pricing information. The Cost Proposal must include all cost details required by this RFP. Both documents must be clearly identified and organized as separate files.

Vendors are required to submit the following:

- One (1) printed original proposal package, containing both the Technical and Cost proposals, packaged separately within the same envelope or box.
- Two (2) USB drives, each containing electronic copies of both the Technical and Cost proposals as separate files.
  - The Technical Proposal should be submitted using a combination of PDF and Microsoft Excel formats (if applicable).
  - The Cost Proposal should be submitted in Microsoft Excel format.

All proposal materials, printed and electronic, must be delivered in sealed packaging and clearly labeled with the following information:

Subject: Registro Demografico – RFP-PS-2025-2026-018-VITAL RECORDS-DEM REG

The Puerto Rico DOH requires that the Technical and Cost proposal remain separate to ensure an impartial evaluation process.

2. BACKGROUND, OVERVIEW, AND SERVICES

2.1. Background Information

The Demographic Registry, established under the Department of Health of Puerto Rico, was created pursuant to Law No. 24 of April 22nd, 1931, as amended. The Registry is responsible for all matters relating to the registration of births, marriages, and deaths that occur or are celebrated in Puerto Rico; maintaining a record of all divorces granted in Puerto Rico; and overseeing the collection, custody, preservation, amendment, and certification of vital records. It also manages the collection of other required reports, as well as the tabulation, analysis, and publication of vital statistics and related activities.

The practice of civil registrations in Puerto Rico began on January 1st, 1885, with the Civil Registry Provisional Law of June 17th, 1870, enacted by Spain. In 1931, with the passage of Law No. 24, statutes and codes were developed to govern the registration of civil events. This law remains in effect today and, despite having undergone only minor amendments, continues to serve as the foundation for vital records registration on the Island. Nevertheless, the Demographic Registry actively participates in the national vital records community and continues to advance toward the implementation of the Model Law and other current standards and practices recommended by the National Center for Health Statistics (NCHS) and NAPHSIS.

Following Hurricane María in 2017, Puerto Rico received federal relief funds to strengthen critical infrastructure systems. One of the funded initiatives supported the implementation of an Electronic Vital Records System (EVRS). As part of this modernization effort, Puerto Rico launched a web-enabled Electronic Death Registration System (EDRS) in January 2021. Currently, most medical facilities, funeral homes, and all medical examiners utilize the EDRS to register death events electronically.

At present, birth and fetal death records are registered by entering data into a Puerto Rico–developed system once the paper certificate is handed in at one of the local offices of the

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Demographic Registry. After the data is entered, the certificate is filed and sent to the Central Office in San Juan for quality assurance and data validation.

All vital events (including births, deaths, marriages, and fetal deaths) are assigned a National File Number (equivalent to a State File Number). The Demographic Registry also processes delayed registrations of all vital events, voluntary acknowledgments of parentage, emancipations, legitimations, gender changes, marriage license issuances, and manages amendments and corrections to registered events. Additionally, the Registry issues disposition and out-of-jurisdiction transfer permits, as well as special registrations, including adoptions and foreign-born registrations.

2.2. Demographic Registry Offices and Services Provided

The Demographic Registry operates one (1) Central Office, located in the capital San Juan, Puerto Rico, and sixty-one (61) offices distributed within forty-seven (47) of seventy-eight (78) municipalities of the Island.

Offices provide a wide range of services by walk-in requests and include the following:

- Issuance of birth, marriage, death, and fetal death certificates
- Marriage license issuance
- Cremation, burial, and transfer permits
- Registration of vital events in paper form

The Central Office provides more specialized services by walk-in or mail-in requests and include the following:

- Adoptions (both in and out of jurisdiction)
- Emancipations
- Amendments and corrections to vital records
- Voluntary acknowledgments of parentage after birth registration
- Legitimations
- Gender changes
- Delayed registrations of all vital events
- Registry of wedding officiants, funeral directors, embalmers, cremation facilities, and funeral homes
- Genealogy study
- Verification of all vital events
- Record sealing or protection services

Adoption, emancipation, and certain types of amendments are handled specifically at the Central Office, while some amendments can be made at the local offices.

The issuance of birth, marriage, death, and fetal death certifications is also available through digital platforms, such as VitalChek and Salud Digital, as well as through mail-in requests. The Central Office additionally issues cremation, burial, and transfer permits to funeral homes upon requests submitted through a locally developed system known as Salud Digital. Additionally, through the Salud Digital platform, wedding officiants may request to be registered in the Registry of Officiants, a process managed centrally by the Demographic Registry. Through this same platform, citizens wishing to marry may also apply for their marriage license electronically, facilitating the process and reducing the need for in-person visits to local offices.

During the COVID-19 pandemic, the Renovaciones Online system was also used to receive digital images of birth and death certificates to expedite data entry for birth registrations and COVID-related death events. It was further utilized to receive certificate issuance requests (birth, death, and marriage) for pick-up at local offices. This practice continues today.

Payments for requests submitted through Salud Digital and VitalChek are received via ACH deposit. Payments for mail-in applications are made by money order, which are then converted into Puerto Rico Treasury stamps. Payments for walk-in requests are made directly using Puerto Rico Treasury stamps. The cumulative value of these Treasury stamps is subsequently processed for deposit into the Demographic Registry's government account by the Puerto Rico Department of Treasury.

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As Puerto Rico transitions to a fully web-enabled vital records registry, operations will adopt a central registration with local issuance model. Under this model, local offices will be able to create and submit service requests, enter information, and scan supporting documentation. However, all registration and amendment activities will be processed centrally, while issuance may occur either at the local or central level.

The new EVRS must therefore support a workflow that allows for data entry at the local level, completion of registration at the central level, and issuance from either location.

During the previous modernization phase, death data was converted as part of the EDRS implementation. However, birth, fetal death, and point-of-sale data remain in the legacy SQL database, as does the original death data from prior to 2021.

3. PROJECT DESCRIPTION AND REQUIREMENTS

3.1. Project Objective and Goals

The objective of this project is to procure and implement a 2nd generation, FHIR-enabled Electronic Vital Record System (EVRS). Transitioning to a fully enhanced electronic registration system will enable Puerto Rico to generate timely and accurate reporting directly from the system, promote interoperability between the Vital Records program and other state and federal agencies, improve service delivery to Puerto Rico residents, and support faster and more precise data exchange.

The system shall operate in both English and Spanish. The awarded vendor will be responsible for providing training and comprehensive documentation in both languages to designated Puerto Rico trainers, ensuring that the new system is fully adopted and effectively utilized by all stakeholders.

The specific goals associated with the procurement and implementation of the new EVRS include:

- A web-enabled EVRS in which all standard EVRS modules are fully integrated and function cohesively.
- A FHIR-enabled platform designed to promote and facilitate interoperability with jurisdictional partners (both public and private) including direct data exchange with the National Center for Health Statistics (NCHS) through the State and Territorial Exchange of Vital Events (STEVE) system.
- Improved data quality through compliance with all NCHS edit rules, cross-field validations, and Puerto Rico specific edits.
- Ad hoc reporting capability directly from the EVRS database.
- Timely and accurate reporting utilizing FHIR and IJE data formats, including secure transmissions with NCHS and STEVE.

3.2. Project Scope of Work

The Department of Health, Demographic Registry seeks a vital records software vendor capable of providing a core or base system for the registration of all vital records events. The Electronic Vital Records System (EVRS) will be hosted in the Puerto Rico.Gov Azure Cloud, with a redundant server located at the Office of Informatics and Technological Advances (OIAT) data center in San Juan, Puerto Rico.

The EVRS will be configured to comply with all Puerto Rico statutes, codes, and administrative requirements, as well as any additional specifications identified through the Joint Application Design (JAD) and GAP Analysis sessions. The system must include a Graphical User Interface (GUI) available in both English and Spanish (see Milestone 2).

Additionally, the vital records software vendor shall:

A. Convert and migrate all data from the various existing vital records systems into the new EVRS.
B. Load and integrate all scanned images from the current EVRS into the new system, ensuring that each image is properly linked to its corresponding record.

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C. Provide professional services as defined in the Milestone Section to ensure effective, timely, and controlled implementation.
D. Provide ongoing application maintenance and system support once the system is live.
E. Perform all services in full compliance with the provisions and requirements stated in this RFP and to the sole satisfaction of the Department of Health.
F. Comply with all applicable Puerto Rico Security Policies, including those established by the Office of Informatics and Technological Advances (OIAT) and the Puerto Rico Innovation and Technology Service (PRITS).
G. Utilize the URL name (DNS) provided by the Puerto Rico Department of Health.

The software vendor shall provide all services and meet all requirements outlined in the following sections. Puerto Rico plans to implement the project in three (3) phases:

1. **Phase 1** – Implementation of the **Electronic Death Registration (EDR)** and Point of Sale modules.
    This phase is estimated to take twelve **(12) months** to complete.
2. **Phase 2** – Implementation of the **Electronic Birth Registration (EBR)**, including **special registrations** and **Fetal Death**.
    This phase is anticipated to take twelve (12) months, commencing once the contract amendment or renewal has been executed following the completion of Phase 1.
3. **Phase 3** – Implementation of the **Marriages** module.
    This phase is anticipated to take six (6) months, commencing once the contract amendment or renewal has been executed following the completion of Phase 2.

The following section describes the major milestones and deliverables that are requirements for the Puerto Rico EVRS Project. Since this project will be conducted in three (3) phases, all major milestones will be repeated for each subsequent phase.

As appropriate, general tasks are identified to represent activities that will recur in each subsequent phase. Each phase of this project includes both product (software) deliverables and project management deliverables (planning, execution, monitoring and control, quality assurance, and handoff).

The next section provides an overview of the purpose, milestones, and tasks required to successfully execute each phase of the EVRS implementation.

3.3. Milestones and Deliverables

3.3.1.Milestone One (1) – Planning and Administration

The objective of this milestone is to ensure that adequate planning, organization, and project management resources are dedicated to the successful execution of this project.

The vendor shall conduct Project Initiation with the Puerto Rico Project Team within thirty (30) days of contract execution. It is desirable that this activity be conducted on-site. All project initiation activities will be mutually agreed upon between the vendor and the Puerto Rico Project Managers.

The goal of the Project Initiation activities is to enable both parties to collaboratively establish and validate all information related to the project approach, timelines, governance structure, risks, and potential issues associated with the project.

Milestone 1 Activities – The software vendor must:

I.   **Develop a Comprehensive Project Plan:**

The vendor shall work with the Puerto Rico Project Manager to develop a detailed Project Plan with fixed deadlines. The plan must include the following components:

1. Project Background;
2. Project Objectives;
3. Scope;
4. Success Criteria;
5. Assumptions;

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6. Constraints;
7. Approach to the project;
8. Entrance and exit criteria for specific project milestones;
9. Project Organization - including a **Resource Plan** defining roles and responsibilities for the software vendor, subcontractors (if applicable), and the Puerto Rico Project Team;
10. Deliverables and due dates;
11. Project Staffing Plan;
12. Project Management Methodology utilizing the PMI Standards;
13. Communication Plan describing methods and frequency of communication between the vendor, Puerto Rico Project Team members, and internal
14. Risk Management Plan - including an initial list of identified risks.

    Using PMI methodology, the vendor shall evaluate each risk's probability and impact of occurrence and facilitate sessions with the Puerto Rico Project Team and other participants designated by the Puerto Rico Project Sponsors to review and agree upon each risk, its probability, and potential impact.

    For all risks assessed as medium or high probability and impact, the vendor shall work with Puerto Rico to:

    - Document the potential impact and cost to the project if the risk occurs, and
    - Develop a mitigation strategy for each identified risk.

II. Develop and Maintain a Project Schedule

The vendor shall develop a Project Schedule using Microsoft Project (MS Project) that outlines all activities, activity durations, sequencing, dependencies, and resource assignments.

Weekly Status Meetings and Bi-Weekly Status Reports

The vendor shall provide a bi-weekly written project status report each Friday by 12:00 p.m. AST. The format of the report will be approved by Puerto Rico during Project Initiation.

Each status report must include:

1. Accomplishments during the reporting period, organized by milestone
2. Upcoming tasks for the next two weeks, organized by milestone
3. Identification of Puerto Rico and vendor resources required for upcoming activities
4. Issues and risks that need to be addressed, including contractual concerns
5. Updated MS Project timeline showing percentage completed, tasks assigned, tasks completed, tasks remaining, identification of schedule slippage (if any), and proposed resolution strategies

The Vendor Project Manager (PM) shall attend weekly status meetings with the Puerto Rico Project Manager (PM) and other participants as designated by the Puerto Rico Project Sponsor. Attendance may be in person or via teleconference, as mutually agreed upon.

The meeting agenda will be mutually determined during Project Initiation. Meeting minutes will be prepared by the vendor and posted to the Project SharePoint site within 24 hours after each meeting.

III. Update the Project Plan for Each Subsequent Phase of the PR EVRS Implementation

For each project phase, the vendor shall:

1. Update the project schedule and resources to reflect the new implementation activities; and
2. Revise the project plan documents, if necessary, to reflect changes in scope, methodology, or any other aspect of the plan.

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Milestone 1 Deliverables:

Deliverable Number	Description Of Deliverable
MS1-A	Detailed Project Plan and Schedule for Phase 1
MS1-B	Updated Project Plan and Schedule for Phase 2
MS1-C	Updated Project Plan and Schedule for Phase 3

3.3.2. Milestone Two (2) – Confirmation of Business System Requirements (JAD Sessions)

The objective of this milestone is to collaborate with the Puerto Rico Project Team to conduct Joint Application Design (JAD) sessions and a Gap Analysis comparing the software vendor's core/base solution against Puerto Rico's business and system requirements. The purpose is to identify the system configurations that must be completed by the software vendor and the business process changes that must be made by Puerto Rico in order to successfully implement the new EVRS.

The outcome of this milestone will be a Gap Analysis Document and documentation of the Joint Application Design, which together will serve as a foundational reference for system configuration and implementation. This milestone shall be repeated before each new phase of the project.

Milestone 2 Activities - The software vendor must:

I. Provide Environment

The software vendor shall be responsible for setting up the necessary environment and tools to conduct the JAD sessions and Gap Analysis. This may include creating or configuring an instance of the application to support the review sessions.

II. Conduct JAD Sessions / Gap Analysis

The software vendor is responsible for conducting a series of consecutive Joint Application Design (JAD) sessions and a Gap analysis, preferably on-site, over a period of approximately five (5) to ten (10) days, in collaboration with the Puerto Rico Project Team.

These JAD sessions will be used to jointly review Puerto Rico's business processes, functional needs, and statutory requirements, and to perform a Gap Analysis comparing them to the core/base system functionality. The analysis will address all functionality related to the modules and core components of the system being implemented in the corresponding project phase.

The Gap Analysis will include the following elements:

1. A traceability spreadsheet documenting all agreements reached during the JAD sessions.
2. Documentation of specific steps within Puerto Rico's business processes that must be modified by Puerto Rico to accommodate the core/base solution.
3. Identification of configuration or modification requirements that must be completed by the software vendor to ensure compliance with Puerto Rico statutes and regulations.
4. Updated business process flow diagrams reflecting the final agreements reached during the JAD sessions.

III. Prepare Gap Analysis Document:

The software vendor, in collaboration with the Puerto Rico Project Team, shall jointly prepare the Gap Analysis Document and compile the JAD session documentation, consolidating all findings, agreements, and configuration requirements identified during the sessions.

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Both parties shall work together to review, validate, and finalize the documentation to ensure that all business, technical, and regulatory requirements are accurately captured.

Once completed, the Puerto Rico Project Team shall formally sign off on both the Gap Analysis Document and the JAD session documentation. Together, these deliverables will serve as the official reference documents for subsequent system configuration, customization and implementation activities.

IV. Phase 2 and Phase 3

All of the above activities will be repeated for each subsequent project phase, ensuring that the Gap Analysis and JAD documentation remain current and accurately reflect the functional and regulatory requirements of each module being implemented.

Milestone 2 Deliverables:

Deliverable Number	Description of Deliverable
MS2-A	Set up the environment for JAD Sessions and Gap Analysis
MS2-B	Facilitate JAD Sessions and Gap Analysis
MS2-C	Sign off on Gap Analysis and JAD Session Documentation
MS2-D	Complete the above deliverables as needed for Phase 2 and Phase 3

3.3.3. Milestone Three (3) – Assistance with the Implementation of Puerto Rico Environments

The objectives of this Milestone are to create the necessary environments for a "sandbox", testing, training, production and replication; and to assist Puerto Rico in providing the necessary documents and diagrams to OIAT to satisfy Puerto Rico security requirements.

Milestone 3 Activities - The software vendor must:

I. Provide development and Sandbox environments

Provide development and sandbox environments at the software vendor location to support configuration and early testing activities.

II. Assist OIAT with Server Specifications for the Azure PR.Gov Cloud

Assist OIAT in determining the technical specifications for the servers that will host the EVRS on the Azure PR.Gov Cloud.

III. Assist OIAT with Specifications for the Replication Server

Assist OIAT in defining the specifications for the real-time replication server that will house the application database at the OIAT Data Center.

IV. Assist with the Setup of the Replication Server in the OIAT Data Center

Assist OIAT, as needed, with setting up the setup and configuration of servers within the Azure Puerto Rico.gov Cloud for the following environments:

1. Test
2. Training
3. Production

V. Assist with setting up the Replication server in the OIAT Data Center

Assist OIAT with the configuration and replication server at the OIAT Data Center. This includes supporting OIAT technical staff in validating system connections, security settings, and the data synchronization process.

VI. Connect Third-Party Software to Test and Production Environments

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Connect all third-party software to both the test and production environments, ensuring full integration, interoperability, and operational functionality. Required integrations include:

1. OVS
2. STEVE FHIR
3. EVVE
4. VIEWS 2
5. VitalChek

VII.   Provide Security Documentation and Diagrams

Provide all necessary technical documentation, architecture diagrams, and configuration details required to complete the PRITS/OIAT security documentation process.

VIII.   Provide Training to OIAT Staff

Provide training to OIAT staff responsible for maintaining the servers at the replication site. Training must include maintenance procedures, monitoring protocols, and troubleshooting techniques to ensure sustainable operation and self-sufficiency after project completion.

Milestone 3 Deliverables:

Deliverable Number	Description of Deliverable
MS3-A	Provide specifications for the servers for the PR.Gov and replication sites
MS3-B	Assist with setting up and configuring the servers and loading the application
MS3–C	Set up and configure OVS, STEVE, EVVE, VIEWS 2, VitalChek on the test and production environments
MS3-D	Assist Puerto Rico with the creation and delivery of Puerto Rico Security documentation
MS3-E	Provide training to OIAT staff for server maintenance of the servers at the replication site

3.3.4. Milestone Four (4) – Design and Configuration of Proposed Solution

The objective of this milestone is to configure the system according to the agreements reached in the JAD sessions, as documented in the Gap Analysis Deliverable.

Milestone 4 Activities - The software vendor must:

I.   Configure the Proposed Solution

Configure the system according to the specifications agreed upon with Puerto Rico, as detailed in the Gap Analysis Deliverable, including GUI interface in both English and Spanish.

II.   Conduct Configuration Review Sessions

Conduct interactive configuration review sessions (in person or via webinar) with the Puerto Rico Team every two weeks between approval of the Gap Analysis Deliverable and User Acceptance Testing (UAT) to review progress, address configuration questions, and discuss elements such as databases, tables, screens, fields, system edits, forms, and reports.

The software vendor will utilize a portion of these meetings to show configuration progress and to allow Puerto Rico to provide feedback throughout the configuration period. These sessions will be established and scheduled on the **MS Project Schedule** when the **Comprehensive Project Plan** is delivered in **Milestone 1**.

III.   Conduct Testing

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Perform unit and integration testing on all components of the modules before providing the software to Puerto Rico for review.

IV. Demonstrate the Tested Solution

Once each module is completely configured and tested by the vendor, the vendor will conduct a walk-through with Puerto Rico of the configured module installed on the test environment. **Puerto Rico will have up to five (5) days** to review the module to confirm that all the required functionality is present for UAT. Any missing functionality must be corrected and re-represented until Puerto Rico deems the module ready for UAT.

V. Repeat the Configuration Activities for Phases 2 and 3

Repeat the configuration activities described above for Phases 2 and 3 of the project, ensuring consistent application of design standards, testing protocols, and review procedures.

Milestone 4 Deliverables:

Deliverable Number	Description of Deliverable
MS4-A	Demonstrate the configured and tested solution for Phase 1 Modules, ready for User Acceptance Testing (UAT)
MS4-B	Demonstrate the fully configured and tested solution for Phase 2 modules, ready for User Acceptance Testing (UAT).
MS4-C	Demonstrate the fully configured and tested solution for Phase 3 modules, ready for User Acceptance Testing (UAT).

3.3.5. Milestone Five (5) – Data Conversion, Migration, and Image Migration

The objectives of this milestone are to (a) convert and migrate the data from the existing systems into a format acceptable to the PR EVRS and populate the PR EVRS with the converted data; (b) import the images from the current PR system into the new PR EVRS system and link them with the corresponding records.

Data conversion and migration will encompass data from the various legacy systems and years. In some cases, there are full electronic record sets that will be migrated to the new system. In other cases, there are indexed data sets that will be converted and migrated for two purposes: (1) assist in locating paper records, and (2) provide the ability to backfill records in the new system in order to create a fully electronic record. All library tables from the current systems will be migrated or recreated in the new EVRS.

Attachment A provides further information on the various systems that contain data and the types of records and images to be converted and migrated to the new system.

Event data and images will be converted during their corresponding implementation phase.

Milestone 5 Activities - The software vendor must:

I. Develop a Data Conversion and Migration Plan

Submit a **Data Conversion and Migration Plan** that describes the process used to convert and move data from the existing systems to the PR EVRS, and the process that the vendor and Puerto Rico will use to confirm that the data has been accurately converted and migrated

The plan will include:

1. Data conversion and migration objectives;

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2. A data dictionary;
3. Tools and techniques used in the data conversion and migration processes;
4. Roles and responsibilities for data conversion and migration including Puerto Rico roles and responsibilities;
5. Data conversion and migration strategies and methodologies;
6. Strategy for migrating all images;
7. Final list of data to be converted and migrated;
8. Data issues and resolutions; and,
9. Data validation methodology, including but not limited to providing Puerto Rico with:

   a. Total records successfully converted and subsequently migrated;
   b. Total records not successfully converted: provide a detailed listing of these records for analysis by Puerto Rico staff to determine possible record corrections;
   c. Total records only partially converted; provide a detailed listing of these records for analysis by Puerto Rico staff to determine possible record corrections;
   d. Recommendations regarding solutions of partial or not converted records;
   e. Summary of problems encountered and steps to resolve these problems;
   f. Tools to validate any hidden fields; and,
   g. Exports that can be used for data validation by the Puerto Rico staff.

II. **Develop Data Conversion and Migration Programs**

Develop the necessary programs to convert all legacy data files and reference tables to populate the PR EVRS database, including any cross-walking required to comply with the EVRS database design, NCHS codes (including FIPS codes), Puerto Rico, and municipality-specific codes.

III. **Successfully Convert the Data**

Test the data conversion programs and produce data validation reports and exports as many times as required to ensure successful import and that the files can continue to be imported from the legacy systems after data conversion is complete. Data conversion programs must be fully tested prior to the beginning of User Acceptance Testing (UAT) so that users can work with a populated database during UAT.

IV. **Successfully Migrate Images**

Migrate the images from the current EVRS to the new EVRS and ensure that all images are properly linked to the corresponding records.

V. **Repeat for Phases 2 and 3**

Repeat the data conversion activities listed above for Phases 2 and 3 of the project.

Milestone 5 Deliverables:

Deliverable Number	Description of Deliverable
MS5-A	Data Conversion Plan and Migration Plan
MS5-B	Successful conversion of all legacy data files and reference tables for Phase 1
MS5-C	Successful migration of all images during Phase 1
MS5-D	Successful conversion of all legacy data files, images, and reference tables for Phase 2
MS5-E	Successful conversion of all legacy data files, images, and reference tables for Phase 3

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3.3.6. Milestone Six (6) – User Acceptance Testing (UAT)

The objective of this Milestone is to fully exercise the configured solution through various scenarios and to take corrective action as needed to assure that the system satisfies all the functionality as agreed between Puerto Rico and the software vendor during the JAD sessions and as documented in the Gap Analysis Deliverable and subsequent configuration sessions.

Milestone 6 Activities - The software vendor must:

I. **UAT Defect Tracking Plan**

Provide a written methodology detailing how defects found during the UAT will be reported and tracked.

II. **UAT Test Plan**

The Puerto Rico project team will draft the UAT plan. The software vendor will be required to review, provide comments, and sign off on the UAT Plan. The plan will include:

1. An overview of the UAT exercise, including scope, stakeholder involvement, and timeframes;
2. UAT Entrance and Exit Criteria;
3. UAT Procedures;
4. UAT Training Plan and Schedule; and
5. UAT On-Site and Off-Site Support Procedures.

III. **UAT Test Scripts**

The vendor will provide test scripts to Puerto Rico that include the basic navigation steps to complete each test. Puerto Rico will utilize these scripts to create more detailed scripts that test all scenarios discussed during the JAD sessions.

IV. **Provide Load Testing**

The vendor will provide a plan on how they will conduct automated performance testing of the system. The plan will include the automated tool to be used, the scenarios to be simulated, and the reports that will be provided to Puerto Rico. Puerto Rico will work with the vendor to identify the scenarios and transactions to be simulated, determine the total number of concurrent transactions to mimic peak system usage, and agree upon acceptable levels of performance as part of the planning process prior to the automated testing. The vendor will conduct the testing and review the results with Puerto Rico. Based on performance results Puerto Rico and the vendor will work together to optimize the performance of the system.

V. **UAT On-Site Activities**

User Acceptance Testing will be conducted in an iterative fashion until all configuration issues are resolved to Puerto Rico's satisfaction. The software vendor should plan on at least 1 on-site visit of 4 days to provide assistance during UAT for each Phase of the project.

1. The software vendor must provide training to selected Puerto Rico staff and stakeholders prior to beginning UAT for each module. UAT training includes application training and UAT procedure training for reporting and tracking defects. Training will be conducted in person at the Demographic Registry.
2. Provide on-site assistance during the first week of UAT for each module to observe the testing and provide additional training as required to ensure testers are using the software correctly.

VI. **Provide Frequent Updates to Resolve Defects**

Any necessary revisions to the system or the data conversion programs must be completed by the software vendor. Testing will be done in an iterative fashion, performing as much testing as possible between revisions and then reiterating the preparation and testing as needed until all results are satisfactory to Puerto Rico.

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VII. **Complete All UAT Activities for Phases 2 and 3**

Repeat the UAT-related tasks described above for Phases 2 and 3 of the project, maintaining the same standards of validation, support, and documentation.

Milestone 6 Deliverables:

Deliverable Number	Description of Deliverable
MS6-A	UAT Defect Tracking Plan
MS6-B	Review and Sign off on UAT Test Plan for Phase 1
MS6-C	Provide basic test scripts for each module
MS6-D	1 On-site trip for 4 days each to assist with UAT during Phase 1
MS6-E	Puerto Rico acceptance of Phase 1 modules
MS6-F	1 On-site trip for 4 days to assist with UAT during Phases 2 and 3
MS6-G	Puerto Rico acceptance of Phase 2 and 3 modules

3.3.7. Milestone Seven (7) – Training

The purpose of this milestone is to develop staff to provide on-going training to external and internal stakeholders. Puerto Rico will use a Train-the-Trainer approach for on-going training. The objective of this milestone is to provide the Puerto Rico trainers with the necessary training and support materials to effectively conduct PR EVRS training on an on-going basis. All training for this milestone will be provided by the software vendor and will be conducted onsite at the Demographic Registry.

Milestone 7 Activities - The software vendor must:

I. **Provide a Comprehensive Training Packet**

Provide a comprehensive training packet in electronic format for use by the identified trainers. This material will be provided in English and Spanish.

The training packet will include a training plan, course outlines, training exercises and other materials for delivering training on the use of the software including the Administrator functions. Specifically, the training packet will include, by type of training and user group:

1. A description of training sessions to include:
   a. Session goals;
   b. User profile and prerequisites;
   c. Business functions and processes covered in the session;
   d. Examples of practical exercises to be used during the session; and
   e. Hours required for each session.
2. Course outlines and training materials with time allocations for each topic;
3. Method by which training will be conducted;
4. Training exercises that support the course outlines;
5. Metrics for measuring effectiveness of overall training; and
6. An on-line testing method that can be administered to new users, by user group, that must be successfully passed before the user is granted access to the production system.

II. **Train Puerto Rico Trainers on PR EVRS Application**

Provide application training for the Puerto Rico trainers using the above-developed training materials.

III. **Train Puerto Rico Staff on PR EVRS Application Administration**

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Provide application administrator training for a maximum of three (3) Vital Records business staff.

IV. **Train Puerto Rico Staff on PR EVRS System Administration**

Provide training for a maximum of three (3) OIAT staff that includes:

1. Process associated with receiving, testing, and installing patches and upgrades; and
2. Procedures to ensure coordination between the vendor and OIAT to maintain servers at an appropriate release level for the application.

V. **Complete the Activities for Phases 2 and 3**

Repeat the tasks described above for Phases 2 and 3 of the project.

Milestone 7 Deliverables:

Deliverable Number	Description of Deliverable
MS7-A	Comprehensive Application Training Packet for Phase 1
MS7-B	Application Training for Puerto Rico trainers for Phase 1
MS7-C	Application Administrator and Technical Training for the Puerto Rico OIAT and Business staff for Phase 1
MS7-D	Comprehensive Application Training Packet for Phase 2
MS7-E	Application Training for Puerto Rico trainers for Phase 2
MS7-F	Application Administrator and Technical Training for the Puerto Rico OIAT and Business staff for Phase 2
MS7-G	Comprehensive Application Training Packet for Phase 3
MS7-H	Application Training for Puerto Rico trainers for Phase 3
MS7-I	Application Administrator and Technical Training for the Puerto Rico OIAT and Business staff for Phase 3

3.3.8. Milestone Eight (8) – Documentation

The objective of this Milestone is to provide Puerto Rico with online help and user documentation that provides a comprehensive understanding of the system from both a technical and functional perspective. The documentation must be provided in both English and Spanish. Once the system has been modified and configured, the software vendor must provide Puerto Rico with customized online help and user documentation in electronic format that incorporates all the system modifications and configurations that were made for Puerto Rico.

Milestone 8 Activities - The software vendor must:

I. **Provide a customized set of User Documentation**

Before going live, the software vendor must provide a customized set of documentation that reflects all the modifications and configurations for the system. This documentation will be provided in both English and Spanish. Since the system will be implemented in three (3) phases, the operating procedures must be augmented for each phase, as necessary.

II. **Provide a customized set of Technical Documentation**

The software vendor must provide the documentation required to maintain technical and functional system integrity. Include both business-specific processes and system support processes. This documentation will be provided in both English and Spanish.

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Since the system will be implemented in three (3) phases, the operating procedures must be augmented for each phase, as necessary.

VI.   Complete the Activities for Phases 2 and 3

Repeat the tasks described above for Phases 2 and 3 of the project.

Milestone 8 Deliverables:

Deliverable Number	Description of Deliverable
MS8-A	User Documentation for Phase 1
MS8-B	Technical Documentation for Phase 1
MS8-C	User and Technical Documentation for Phase 2
MS8-D	User and Technical Documentation for Phase 3

3.3.9.Milestone Nine (9) – Parallel Pilot

The objective of this milestone is to determine if the system performs adequately in a simulated live environment from both a workflow and load-balancing perspective. The system must pass this Milestone to be approved for production. The parallel pilot will include all system functions. The parallel pilot will include the incorporation of all the stakeholder groups involved in the process.

Milestone 9 Activities - The software vendor must:

I.   Assist Puerto Rico with Pilot Implementation Plan
Puerto Rico will prepare the Pilot Implementation Plan with assistance from the software vendor.   The software vendor must sign off on the plan. This plan will include, but is not limited to the following:
1. An overview of the pilot exercise, including scope, stakeholder involvement, and timeframes;
2. Pilot Entrance and Exit Criteria;
3. Pilot Operating Procedures including Help Desk procedures;
4. Pilot Training Plan and Schedule; and
5. Pilot On-Site and Off-Site Support Procedures.

II.   Provide Remote Assistance during Parallel Pilot

The software vendor must provide remote assistance to Puerto Rico and select stakeholders during the parallel pilot. Remote assistance must be directly with the software vendor's project team, and response times may not be more than 60 minutes from the time a call is placed by the Puerto Rico team to the software vendor, within normal working hours, as mutually agreed in the parallel pilot plan. Remote assistance will include:

1. Assisting users with understanding the functionality and practical use of the system;
2. Identifying defects in the system;
3. Resolving defects in the system;
4. Evaluating system effectiveness against the established pilot goals and exit criteria;
5. Revising pilot procedures as needed; and,
6. Reviewing and evaluating the results of the parallel pilot

III.   Complete the Activities for Phases 2 and 3

Repeat the tasks described above for Phases 2 and 3 of the project.

Milestone 9 Deliverables:

Deliverable Number	Description of Deliverable
MS9-A	Signature on the Phase 1 Pilot Plan

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Deliverable Number	Description of Deliverable
MS9-B	Provide Remote Assistance during Phase 1 Pilot
MS9-C	Sign-off of successful Phase 1 Pilot
MS9-D	Complete the above tasks for Phases 2 and 3

3.3.10. Milestone Ten (10) – Production Implementation

The objective of this milestone is to place the successfully piloted system into production, monitor its operation under full production load, and dynamically fine-tune it to ensure that the system continues to satisfy the functionality and performance defined by Puerto Rico.

Milestone 10 Activities - The software vendor must:

I. **Go Live Implementation Plan**

The software vendor must assist Puerto Rico with developing the Go Live Implementation Plan. The software vendor must sign off on the Go Live Implementation Plan. This plan will include, but is not limited to, the following:

1. Go / No Go Criteria;
2. Go Live Procedures;
3. Roll-back criteria and procedures;
4. Training Plan and Schedule;
5. On-Site Support Procedures;
6. Help Desk Procedures; and
7. Off-Site Support Procedures.

II. **Prepare for Implementation**

The software vendor must prepare for the implementation of the production system for both internal and external stakeholders. Specific tasks include:

1. Provide any additional training to Puerto Rico or stakeholders as identified during the parallel pilot.
2. Assist Puerto Rico with the implementation of the production environment;
3. Make any agreed-upon changes to the system that were identified as a result of the parallel pilot; and
4. Conduct the final conversion and migration of the data, reference tables, and image files.

III. **Provide On-Site Assistance During Go Live**

The software vendor must provide on-site support to Puerto Rico during the first five (5) working days of go-live in the production environment. After the first five (5) working days in production, and upon consent of Puerto Rico, the software vendor's project team may provide support remotely. If support is supplied remotely, it must be directly with the software vendor's project team for 30 days from the date of sign-off of go-live. Response times may not be more than 30 minutes from the time a call is placed by the Puerto Rico project team to the software vendor, within normal working hours, as mutually agreed in the go-live plan. On-site and remote assistance will include:

1. Assisting users with understanding the functionality and practical use of the system;
2. Identifying defects in the system; and
3. Evaluating the system's effectiveness against the established go-live criteria.

IV. **Complete the Activities for Phases 2 and 3**

Repeat the tasks described above for Phases 2 and 3 of the project.

Milestone 10 Deliverables:

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Deliverable Number	Description of Deliverable
MS10-A	Signature on Go-Live Implementation Plan Phase 1
MS10-B	Provide On-Site Assistance During Go Live for Phase 1
MS10-C	Complete the above deliverables for Phase 2 and3.

3.3.11. Milestone Eleven (11) – System Warranty

The objective of this Milestone is to define the system warranty period.

Milestone 11 Activities - The software vendor must:

I. **Provide Warranty Period**

The warranty period will begin on the first production date after Puerto Rico has formally accepted and signed off of the production system (Milestone 10). The warranty will be a one (1) year warranty period after each phase has been accepted by Puerto Rico. The warranty period is provided for no additional charge. Formal acceptance and sign off is defined as:

1. Completion of all system documentation and operating procedures;
2. Completion of all training;
3. Implementation of the automated environment;
4. Testing, conversion, and installation of each phase of the system, and sufficiently monitored to validate all production cycles; and
5. Final approval and acceptance by Puerto Rico at the completion of each phase of the system.

II. **Warranty Period Support Services**

The software vendor must provide, during the warranty period, support services that include:

1. Unlimited phone and online support;
2. Bug fixes;
3. Updates and upgrades;
4. Access to technical support, including release support; and
5. Links for downloading new versions and patches to previous versions.

III. **Release Notes**

The software vendor will provide documentation describing the items addressed by each new release provided to Puerto Rico, and including documentation sufficient to inform Puerto Rico as to how to use the changed items.

IV. **Support Hours**

The software vendor must provide warranty period support Monday through Friday from 7:30 a.m. to 6:00 p.m. AST time for all workdays and mutually agreed upon holidays for Puerto Rico.

V. **Complete the Activities for Phases 2 and 3**

Repeat the tasks described above for Phases 2 and 3 of the project.

Milestone 11 Deliverables:

Deliverable Number	Description of Deliverable
MS11-A	System Warranty Support for Phase 1
MS11-B	System Warranty Support for Phase 2
MS11-C	System Warranty Support for Phase 3

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3.3.12. Milestone Twelve (12) – System Maintenance Support

The objective of this milestone is to provide Puerto Rico with system maintenance support on a yearly basis following the end of the warranty period.

Milestone 12 Activities - The software vendor must:

I. **Provide an Annual Software Maintenance Agreement**
Provide an annual agreement that covers repair of any defects to the PR EVRS, as per the Approved Gap Analysis deliverable and all approved change orders as well as defects in any enhancements included in software releases provided by the software vendor. This maintenance agreement will be renewable yearly for seven years. In addition, annual maintenance will include:
1. Periodic enhancements to the system that the software vendor provides to all implementations;
2. Necessary updates that allow Puerto Rico to continue meeting NCHS and/or CDC reporting requirements. If these updates are required by all jurisdictions in which the software vendor's software is implemented, the software vendor will provide the new functions without charge to Puerto Rico; and
3. Provide an annual agreement for help desk support (2nd level) Monday through Friday, 7:30 AM – 6 PM AST time, excluding Puerto Rico and Federal holidays.

II. **Maintain the Application**
While Azure and Puerto Rico will maintain the servers on both the hosted site and in OIAT, the vendor will ensure that the application is maintained adequately in both locations. This will include:
1. Coordinating with OIAT on all server updates and patches to ensure the application is not negatively impacted;
2. Ensuring any patches to the application are applied in coordination with OIAT and the Demographic Registry system administrator

III. **Complete the Activities for Phases 2 and 3**
Repeat the tasks described above for Phases 2 and 3 of the project

Milestone 12 Deliverables:

Deliverable Number	Description of Deliverable
MS12-A	System Maintenance Support for Phase 1 modules
MS12-B	System Maintenance Support for Phase 2 modules
MS12-C	System Maintenance Support for Phase 3 modules

3.4. Responsibilities

The vendor's project staff will collaborate, in accordance with the stated Milestone Deliverables, with the PRDOH Demographic Registry and its selected Project Manager to plan, manage, and administer project-related activities from the start of the project until the contract is closed or no longer renewed.

Role	Responsibilities
Software Vendor Project Sponsor	The software vendor will provide a senior executive who will serve as the point of escalation for the project. This person will work collaboratively with the PRDOH Project Sponsor to resolve project issues that are beyond the scope of the project managers.
Software Vendor Project Manager	The Software Vendor Project Manager is responsible for ensuring that the vendor delivers the software project on time, within scope, and within budget. The software vendor project manager will be responsible

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Role	Responsibilities
	for directly managing the software project team and ensuring the quality of their work. The software vendor project manager is responsible for working collaboratively with the PR Project Manager to ensure effective project delivery, issue resolution, and risk management. The Software Project manager will meet regularly and one-on-one with the PR Project Manager to coordinate project tasks and provide status updates.

3.5. Vendor's Qualifications and Experience

3.5.1. Vendor's Qualifications

The ideal vendor may possess the following qualifications:

I. Five years (5) of vital records systems experience implementing electronic vital records systems (EVRS) within the United States. A complete EVRS is defined as a complete NCHS/VSCP standards-compliant system for birth, death, and fetal death modules and point of sale integrated with the registration modules.

II. Experience with FHIR and other interoperability software between vital records, government agencies, and public entities.

III. Participates in the NVSS Community of Practice

IV. Sufficient vital records and knowledgeable staff to successfully implement the EVRS within the given timeframes.

V. Two (2) references from U.S. jurisdictions for a governmental agency system implementation. Ideally, one (1) of the references is from a vital records implementation.

3.5.2. Vendor's Personnel Qualifications and Experience

3.5.2.1. Key Staff Qualifications

The software vendor's key personnel preferably demonstrate the following qualifications:

I. The Project Manager
  a. Three (3) years of experience managing vital records, healthcare, public health, or other governmental agency software implementations;
  b. Experience with Project Management Institute (PMI) methodologies and MS Project
  c. Preferably holds a PMP or CMC certificate

II. Data Conversion Lead
  a. Three (3) years of experience working with vital records, public health, health care, or other data-driven government agency data migrations

III. Configuration Lead(s)
  a. Three (3) years of experience working with vital records, public health, health care, or other government agency system implementations.

3.5.2.2. Substitution of Personnel

The Vendor agrees and understands that Puerto Rico DOH's agreement to the contract is predicated in part on the utilization of the specific individual(s) and/or personnel qualifications identified in the bid. Therefore, the Vendor agrees that no substitution of such specific key individual(s) and/or personnel qualifications shall be made without the prior written approval of Puerto Rico DOH. The Vendor further agrees that any substitution made pursuant to this paragraph must be equal to or better than originally proposed and that Puerto Rico DOH's approval of a substitution shall not be construed as an acceptance of the substitution's performance potential. Puerto Rico DOH agrees that an approval of a substitution will not be unreasonably withheld.

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3.5.2.3. Resumes and References for Project Staff

The Vendor must submit a resume for each person being proposed for the project. The resumes must include relevant experience, education, and projects completed and currently assigned to; indicate the role of the staff member and the percentage of time allocated to the project. Please list one reference, preferably from a vital records implementation, with contact information for each staff member being proposed, indicating the work performed and the dates that the staff member was assigned to the project.

3.5.2.4. Subcontractors

The Contractor is solely responsible for executing the scope of work as outlined in the RFP. The Contractor will bear full responsibility for the actions and work conducted by its subcontractors. All terms, conditions, and requirements of the contract shall apply without qualification to any services performed or goods provided by any subcontractor. If the Contractor intends to use subcontractors, the Contractor must identify in the proposal the names of the subcontractors, the responsibilities of the subcontractors, and the specific tasks and percentages of the tasks that the subcontractors will perform.

All proposals must include the following information regarding proposed subcontractors:

I. Complete name of the subcontractor;
II. Complete address of the subcontractor;
III. The responsibilities of the subcontractor;
IV. The specific tasks and percentage of the given task the subcontractor will be performing;
V. Evidence that the subcontractor meets the qualification requirements as stated in Section 3.5.2.1 if required by the work to be performed
VI. Evidence that the subcontractor holds a valid Puerto Rico business license; and
VII. A written statement, signed by each proposed subcontractor, which clearly verifies that the subcontractor is committed to render the services required by the contract.

Failure to provide this information as part of the RFP response may result in the proposal being deemed non-responsive and rejected. The substitution of one subcontractor for another may be made only at the discretion and prior written approval of the project director. The contractor is liable and responsible for all subcontractor work. All issues dealing with the subcontractor are the responsibility of the contractor.

3.5.2.5. Sourcing from Overseas

All contracted services must be provided within Puerto Rico or the continental United States. Vendors are required to indicate in their proposal the specific location where the contracted services will be carried out.

In the event that the Vendor or subcontractor intends to perform work for a limited period of time outside of the United States during the contract period, the Vendor must notify the Puerto Rico Department of Health in writing 60 days before the event. This notification should include the reason the work will be performed outside of the United States, the desired new location, details about the work to be performed, and the percentage of work that will be affected. The Department of Health must approve any changes before the relocation of the work. Failure to obtain approval from the Puerto Rico Department of Health may result in the termination of the contract.

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3.5.3. Vendor's Proof of Insurance

Upon request, the Vendor shall present and maintain during the period of the contract:

I. Commercial General Insurance with limits of $1,000,000 / $2,000,000 in aggregate including:
   a. Bodily Injury and Property Damage
   b. Personal and Advertising Injury
   c. Product and Completed Operations
   d. Medical Payments
II. Professional Liability Insurance with limits of $300,000

3.6. Rights and Access Provisions for Licensing, Data Ownership, and Software Usage

3.6.1. Licensing and Rights Agreement

Ownership of the EVRS – Licensing Agreement

I. The contractor agrees that, in addition to all other rights outlined in this section, Puerto Rico shall have a nonexclusive, royalty-free, and irrevocable license to reproduce or otherwise use and authorize others to use all software, procedures, files and other documentation comprising the EVRS at any time during the period of the contract and thereafter.
II. The contractor agrees to deliver such material to Puerto Rico within 20 business days from receipt of the request by Puerto Rico. Such a request may be made by Puerto Rico at any time prior to the expiration of the contract. The license shall include, but not be limited to:
   a. All EVRS and supporting programs in the most current version;
   b. All scripts, programs, transaction management, or database synchronization software and other system instructions for operating the system in the most current version;
   c. All data files in the most current version;
   d. User and operational manuals and other documentation;
   e. System and program documentation describing the most current version of the system, including the most current versions of source and object code;
   f. Training programs for Puerto Rico DOH and other designated Puerto Rico DOH staff, their agents, or designated representatives, in the operation and maintenance of the system;
   g. All performance-enhancing operational plans and products, exclusive of equipment; and
   h. All specialized or specially modified operating system software and specially developed programs, including utilities, software, and documentation used in the operation of the system.
III. Ongoing upgrades of the application software must be provided through the end of the contract.
IV. Any other specialized software not covered under a public domain license to be integrated into the system must be identified as to its commercial source, and the cost must be identified in the Cost Proposal.
V. Puerto Rico may, as its option, purchase commercially available software components itself rather than through the Vendor.
VI. The Vendor must convey to Puerto Rico, upon request and without limitation, copies of all interim work products, system documentation, operating instructions, procedures, data processing source code and executable programs that are part of the system, whether they are developed by the employees of the contractor or any subcontractor as part of this contract or transferred from another public domain system or contract.
VII. The provision of this section related to Ownership of the EVRS must be incorporated into any subcontract that relates to the development, operation, or maintenance of any part of the system.

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3.6.2. Ownership of Information and Data

Puerto Rico shall also have unlimited rights to use, disclose, or duplicate, for any purpose whatsoever, all information and data developed, derived, documented, installed, improved, or furnished by the contractor under this contract. All files containing any EVRS information are the sole and exclusive property of the Puerto Rico Department of Health. The vendor agrees not to use information obtained for any purposes not directly related to this contract without prior written permission from the Department of Health. The Vendor agrees to abide by all federal and Commonwealth confidentiality requirements.

3.6.3. Guaranteed Access to Software

Puerto Rico Department of Health shall have full and complete access to all source code, documentation, utilities, software tools, and other similar items used to develop/install the proposed EVRS or may be useful in maintaining or enhancing the equipment and EVRS after it is operating in a production environment. For any of the above-mentioned items not turned over to Puerto Rico DOH upon completion of the installation, the contractor must provide a guarantee to Puerto Rico DOH of uninterrupted future access to, and license to use, those items. The guarantee must be binding on all agents, successors, and assignees of the contractor and subcontractor. Puerto Rico DOH's access to source code may be protected by the use of a third-party escrow account. If an escrow account is used, the terms must include at a minimum:

I. Update of the source code in escrow as often as required for the source code to reflect the current version of each application of the software licensed by Puerto Rico DOH, but not less than annually.
II. Puerto Rico DOH has the right to view or access the source code to:
    a. Verify the source code's completeness and readability of the media;
    b. Obtain a copy of the source code in the event of a filing of Bankruptcy where the vendor is no longer able to provide acceptable service;
    c. Obtain a copy of the source code if the vendor ceases to do business completely or to do business in the vital records marketplace.

The guarantee must be binding on all agents, successors, and assignees of the Vendor and subcontractors.

Puerto Rico Department of Health reserves the right to consult legal counsel as to the sufficiency of the licensing agreement and guarantee of access offered by the contractor.

3.7. Conflict of Interest

The Contractor is prohibited from knowingly hiring any professional personnel who are currently employed by the Commonwealth and providing services related to this contract or services that are similar in nature to the contract's scope, both during the contract period and any extensions. Additionally, the Contractor must not employ any former Commonwealth employee who was involved in the creation of this contract until at least two years after their employment with the State has ended.

4. GENERAL REQUIREMENTS

4.1. Contractor's Certification Regarding Lobbying

The Contractor certifies that no Federal nor State appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, a member of the Executive Branch of the government of the Commonwealth of Puerto Rico, an officer or employee of Congress, an officer or employee of the Executive Branch of the government of the Commonwealth of Puerto Rico, or an employee of a member of Congress, or employee of a member of the Executive Branch of the government of the Commonwealth of Puerto Rico in connection with the awarding of any Federal or State contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, or the extension, continuation, renewal, addendum, or modification of any Federal or State contract, grant, loan, or cooperative agreement.

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The Contractor certifies that no funds under this contract shall be used to pay for any activity to support or defeat the enactment of legislation before Congress, or any State or local legislature or legislative body. The Contractor shall not use any funds under this contract to pay for any activity to support or defeat any proposed or pending regulation, administrative action, or order issued by the executive branch of any State or local government.

The Contractor certifies that no funds under this contract shall be used to pay the salary or expenses of the Contractor, or an agent acting for the Contractor who engages in any activity designed to influence the enactment of legislation or appropriations proposed or pending before the Congress, or any State, local legislature or legislative body, or any regulation, administrative action, or Executive Order issued by the executive branch of any State or local government.

The above prohibitions include any activity to advocate or promote any proposed, pending, or future Federal, State, or local tax increase, or any proposed, pending or future requirement or restriction on any legal consumer product, including its sale or marketing, including but not limited to the advocacy or promotion of gun control.

If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any Federal contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying" in accordance with its instructions.

The Contractor shall require that the language of this section be included in the award documents for all subawards at all levels (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of the fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering this transaction imposed by 31 U.S.C. § 1352. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

4.2. Contractor's Certification Regarding Drug Free Workplace

The Contractor certifies it shall provide a drug-free workplace in accordance with the Drug Free Workplace Act of 1988, 41 U.S.C. Chapter 81, and all applicable regulations. The Contractor is required to report any conviction of employees providing services under this contract under a criminal drug statute for violations occurring on the Contractor's premises or off the Contractor's premises while conducting official business. The Contractor shall report any conviction to the Department within five (5) working days after the conviction. Submit reports to:

> Puerto Rico Department of Health
> Demographic Registry
> PO Box 11854
> San Juan, PR 00910-1854

4.3. Contractor's Certification Regarding Environmental Tobacco Smoke

The Pro-Children Act of 1994, (Public Law 103-227, 20 U.S.C. §§ 6081-6084), requires that smoking not be permitted in any portion of any indoor facility owned or leased or contracted for by an entity and used routinely or regularly for the provision of health, day care, early childhood development services, education or library services to children under the age of 18, if the services are funded by Federal programs either directly or through State or local governments, by Federal grant, contract, loan, or loan guarantee. The Pro-Children Act also applies to children's services that are provided in indoor facilities that are constructed, operated, or maintained with such federal funds. The Pro-Children Act

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does not apply to children's services provided in private residences, portions of facilities used for inpatient drug or alcohol treatment, service providers whose sole source of applicable Federal funds is Medicare or Medicaid, or facilities where WIC coupons are redeemed. Failure to comply with the provisions of the Pro-Children Act may result in the imposition of a civil monetary penalty of up to $1,000 for each violation and/or the imposition of an administrative compliance order on the responsible entity.

The Contractor certifies that it will comply with the requirements of the Pro-Children Act and will not allow smoking within any portion of any indoor facility used for the provision of services for children as defined by the Pro-Children Act.

The Contractor agrees that it will require that the language of this certification be included in any subcontract or subaward that contains provisions for children's services and that all subrecipients shall certify accordingly. Failure to comply with the provisions of the Pro-Children Act law may result in the imposition of a civil monetary penalty of up to $1,000 per day.

4.4. Contractor's Certification Regarding Non-Discrimination

The Contractor shall comply with all federal and state statutes, regulations, and executive orders relating to nondiscrimination and equal employment opportunity to the extent applicable to the contract. These include, but are not limited to:

a. Title VI of the Civil Rights Act of 1964 (P.L. 88-352, 42 U.S.C. § 2000d et seq.) which prohibits discrimination based on race, color, or national origin (this includes individuals with limited English proficiency) in programs and activities receiving federal financial assistance and Title VII of the Act which prohibits discrimination based on race, color, national origin, sex, or religion in all employment activities;

b. Equal Pay Act of 1963 (P.L. 88 -38, as amended, 29 U.S.C. § 206 (d));

c. Title IX of the Education Amendments of 1972, as amended (20 U.S.C §§ 1681-1683 and 1685-1686), which prohibits discrimination on the basis of sex;

d. Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794) and the Americans with Disabilities Act of 1990, as amended by the ADA Amendment Act of 2008 (42 U.S.C. 12101 et seq.) as implemented by all applicable regulations;

e. The Age Discrimination Act of 1975, as amended (42 U.S.C. 6101-6107), which prohibits discrimination on the basis of age;

f. Equal Employment Opportunity – E.O. 11246, as amended;

g. The requirements of any other nondiscrimination federal and state statutes, regulations and executive orders which may apply to the services provided via the contract.

4.5. Contractor's Certification Regarding Whistleblower Protections

The Contractor shall comply with the provisions of 41 U.S.C. 4712 states that an employee of a Contractor, subcontractor, grantee, or subgrantee may not be discharged, demoted, or otherwise discriminated against as a reprisal for "whistleblowing". In addition, whistleblower protections cannot be waived by any agreement, policy, form, or condition of employment.

The Contractor's employees are encouraged to report fraud, waste, and abuse. The Contractor shall inform their employees in writing that they are subject to federal whistleblower rights and remedies. This notification must be in the predominant native language of the workforce.

The Contractor shall include this requirement in any agreement made with a subcontractor or subgrantee.

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4.6. Clean Air Act and Water Pollution Control Act

The Contractor shall comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251 et seq.).

4.7. Business Associate Provisions

Health Insurance Portability and Accountability Act of 1996, as amended - The commonwealth agency and the Contractor are both subject to and must comply with provisions of the Health Insurance Portability and Accountability Act of 1996 (HIPAA), as amended by the Health Information Technology for Economic and Clinical Health Act (HITECH) (PL-111-5) (collectively, and hereinafter, HIPAA) and all regulations promulgated pursuant to authority granted therein. The Contractor constitutes a "Business Associate" of the jurisdiction agency. Therefore, the term "contractor" as used in this section shall mean "Business Associate."

The Contractor agrees that for purposes of the Business Associate Provisions contained herein, terms used but not otherwise defined shall have the same meaning as those terms defined in 45 CFR Parts 160 and 164 and 42 U.S.C. §§ 17921 et. seq., including, but not limited to the following:

a. "Access", "administrative safeguards", "confidentiality", "covered entity", "data aggregation", "designated record set", "disclosure", "hybrid entity", "information system", "physical safeguards", "required by law", "technical safeguards", "use" and "workforce" shall have the same meanings as defined in 45 CFR 160.103, 164.103, 164.304, and 164.501 and HIPAA.

b. "Breach" shall mean the unauthorized acquisition, access, use, or disclosure of Protected Health Information which compromises the security or privacy of such information, except as provided in 42 U.S.C. § 17921. This definition shall not apply to the term "breach of contract" as used within the contract.

c. "Business Associate" shall generally have the same meaning as the term "business associate" at 45 CFR 160.103, and in reference to the party to this agreement, shall mean the Contractor.

d. "Covered Entity" shall generally have the same meaning as the term "covered entity" at 45 CFR 160.103, and in reference to the party to this agreement, shall mean the jurisdiction agency.

e. "Electronic Protected Health Information" shall mean information that comes within paragraphs (1)(i) or (1)(ii) of the definition of Protected Health Information as specified below.

f. "Enforcement Rule" shall mean the HIPAA Administrative Simplification: Enforcement; Final Rule at 45 CFR Parts 160 and 164.

g. "HIPAA Rules" shall mean the Privacy, Security, Breach Notification, and Enforcement Rules at 45 CFR Parts 160 and 164.

h. "Individual" shall have the same meaning as the term "individual" in 45 CFR 160.103 and shall include a person who qualifies as a personal representative in accordance with 45 CFR 164.502 (g).

i. "Privacy Rule" shall mean the Standards for Privacy of Individually Identifiable Health Information at 45 CFR Part 160 and Part 164, Subparts A and E.

j. "Protected Health Information" as defined in 45 CFR 160.103, shall mean individually identifiable health information:

a. Except as provided in paragraph (b) of this definition, that is: (i) Transmitted by electronic media; or (ii) Maintained in electronic media; or (iii) Transmitted or maintained in any other form or medium.

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b. Protected Health Information excludes individually identifiable health information in (i) Education records covered by the Family Educational Rights and Privacy Act, as amended, 20 U.S.C. 1232g; (ii) Records described at 20 U.S.C. 1232g(a)(4)(B)(iv); and (iii) Employment records held by a covered entity (commonwealth agency) in its role as employer.

k. "Security Incident" shall be defined as set forth in the "Obligations of the Contractor" section of the Business Associate Provisions

l. "Security Rule" shall mean the Security Standards for the Protection of Electronic Protected Health Information at 45 CFR Part 164, Subpart C.

m. "Unsecured Protected Health Information" shall mean Protected Health Information that is not secured through the use of a technology or methodology determined in accordance with 42 U.S.C. § 17932 or as otherwise specified by the Secretary of Health and Human Services.

The Contractor agrees and understands that wherever in this document the term Protected Health Information is used, it shall also be deemed to include Electronic Protected Health Information.

The Contractor must appropriately safeguard Protected Health Information that the Contractor receives from or creates or receives on behalf of the commonwealth agency. To provide reasonable assurance of appropriate safeguards, the Contractors shall comply with the business associate provisions stated herein, as well as the provisions of the Health Insurance Portability and Accountability Act of 1996 (HIPAA), as amended by the Health Information Technology for Economic and Clinical Health Act (HITECH) (PL-111-5), and all regulations promulgated pursuant to authority granted therein.

The jurisdiction agency and the Contractor agree to amend the contract as is necessary for the parties to comply with the requirements of HIPAA and the Privacy Rule, Security Rule, Enforcement Rule, and other rules as later promulgated (hereinafter referenced as the regulations promulgated thereunder). Any ambiguity in the contract shall be interpreted to permit compliance with the HIPAA Rules.

Permitted Uses and Disclosures of Protected Health Information by the Contractor:

a. The Contractor may not use or disclose Protected Health Information in any manner that would violate Subpart E of 45 CFR Part 164 if done by the commonwealth agency, except for the specific uses and disclosures in the contract.

b. The Contractor may use or disclose Protected Health Information to perform functions, activities, or services for, or on behalf of, the commonwealth agency as specified in the contract, provided that such use or disclosure would not violate HIPAA and the regulations promulgated thereunder.

c. The Contractor may use Protected Health Information to report violations of law to appropriate Federal and State authorities, consistent with 45 CFR 164.502(j)(1), and shall notify the commonwealth agency by no later than ten (10) calendar days after the Contractor becomes aware of the disclosure of the Protected Health Information.

d. If required to properly perform the contract and subject to the terms of the contract, the Contractor may use or disclose Protected Health Information if necessary for the proper management and administration of the Contractor's business.

e. If the disclosure is required by law, the Contractor may disclose Protected Health Information to carry out the legal responsibilities of the Contractor.

f. If applicable, the Contractor may use Protected Health Information to provide Data Aggregation services to the commonwealth agency as permitted by 45 CFR 164.504(e)(2)(i)(B).

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g. The Contractor may not use Protected Health Information to de-identify or re-identify the information in accordance with 45 CFR 164.514(a)-(c) without specific written permission from the commonwealth agency to do so.

h. The Contractor agrees to make uses and disclosures and requests for Protected Health Information consistent with the commonwealth agency's minimum necessary policies and procedures.

Obligations and Activities of the Contractor:

1. The Contractor shall not use or disclose Protected Health Information other than as permitted or required by the contract or as otherwise required by law, and shall comply with the minimum necessary disclosure requirements set forth in 45 CFR § 164.502(b).

2. The Contractor shall use appropriate administrative, physical, and technical safeguards to prevent use or disclosure of the Protected Health Information other than as provided for by the contract. Such safeguards shall include, but not be limited to:

    a. Workforce training on the appropriate uses and disclosures of Protected Health Information pursuant to the terms of the contract;

    b. Policies and procedures implemented by the Contractor to prevent inappropriate uses and disclosures of Protected Health Information by its workforce and subcontractors, if applicable;

    c. Encryption of any portable device used to access or maintain Protected Health Information or use of equivalent safeguard;

    d. Encryption of any transmission of electronic communication containing Protected Health Information or use of equivalent safeguard; and

    e. Any other safeguards necessary to prevent the inappropriate use or disclosure of Protected Health Information.

3. With respect to Electronic Protected Health Information, the Contractor shall use appropriate administrative, physical and technical safeguards that reasonably and appropriately protect the confidentiality, integrity and availability of the Electronic Protected Health Information that Contractor creates, receives, maintains or transmits on behalf of the commonwealth agency and comply with Subpart C of 45 CFR Part 164, to prevent use or disclosure of Protected Health Information other than as provided for by the contract.

4. In accordance with 45 CFR 164.502(e)(1)(ii) and 164.308(b)(2), the Contractor shall require that any agent or subcontractor that creates, receives, maintains, or transmits Protected Health Information on behalf of the Contractor agrees to the same restrictions, conditions, and requirements that apply to the Contractor with respect to such information.

5. By no later than ten (10) calendar days after receipt of a written request from the commonwealth agency, or as otherwise required by state or federal law or regulation, or by another time as may be agreed upon in writing by the commonwealth agency, the Contractor shall make the Contractor's internal practices, books, and records, including policies and procedures and Protected Health Information, relating to the use and disclosure of Protected Health Information received from, created by, or received by the Contractor on behalf of the commonwealth agency available to the commonwealth agency and/or to the Secretary of the Department of Health and Human Services or designee for purposes of determining compliance with the HIPAA Rules and the contract

6. The Contractor shall document any disclosures and information related to such disclosures of Protected Health Information as would be required for the commonwealth agency to respond to a request by an individual for an accounting of disclosures of Protected Health Information in accordance with 42 USCA

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§17932 and 45 CFR 164.528. By no later than five (5) calendar days of receipt of a written request from the commonwealth agency, or as otherwise required by state or federal law or regulation, or by another time as may be agreed upon in writing by the commonwealth agency, the Contractor shall provide an accounting of disclosures of Protected Health Information regarding an individual to the commonwealth agency. If requested by the commonwealth agency or the individual, the Contractor shall provide an accounting of disclosures directly to the individual. The Contractor shall maintain a record of any accounting made directly to an individual at the individual's request and shall provide such record to the commonwealth agency upon request

7. In order to meet the requirements under 45 CFR 164.524, regarding an individual's right of access, the Contractor shall, within five (5) calendar days following a commonwealth agency request, or as otherwise required by state or federal law or regulation, or by another time as may be agreed upon in writing by the commonwealth agency, provide the commonwealth agency access to the Protected Health Information in an individual's designated record set. However, if requested by the commonwealth agency, the Contractor shall provide access to the Protected Health Information in a designated record set directly to the individual for whom such information relates.

8. At the direction of the commonwealth agency, the Contractor shall promptly make any amendment(s) to Protected Health Information in a Designated Record Set pursuant to 45 CFR 164.526

9. The Contractor shall report to the commonwealth agency's Security Officer any security incident immediately upon becoming aware of such incident and shall take immediate action to stop the continuation of any such incident. For purposes of this paragraph, security incident shall mean the attempted or successful unauthorized access, use, modification, or destruction of information or interference with system operations in an information system. This does not include trivial incidents that occur on a daily basis, such as scans, "pings," or unsuccessful attempts that do not penetrate computer networks or servers or result in interference with system operations. By no later than five (5) days after the Contractor becomes aware of such an incident, the Contractor shall provide the commonwealth agency's Security Officer with a description of any remedial action taken to mitigate any harmful effect of such incident and a proposed written plan of action for approval that describes plans for preventing any such future security incidents.

10. The Contractor shall report to the commonwealth agency's Privacy Officer any unauthorized use or disclosure of Protected Health Information not permitted or required as stated herein immediately upon becoming aware of such use or disclosure and shall take immediate action to stop the unauthorized use or disclosure. By no later than five (5) calendar days after the Contractor becomes aware of any such use or disclosure, the Contractor shall provide the commonwealth agency's Privacy Officer with a written description of any remedial action taken to mitigate any harmful effect of such disclosure and a proposed written plan of action for approval that describes plans for preventing any such future unauthorized uses or disclosures.

11. The Contractor shall report to the commonwealth agency's Security Officer any breach immediately upon becoming aware of such an incident and shall take immediate action to stop the continuation of any such incident. By no later than five (5) days after the Contractor becomes aware of such incident, the Contractor shall provide the commonwealth agency's Security Officer with a description of the breach, the information compromised by the breach, and any remedial action taken to mitigate any harmful effect of such incident and a proposed written plan for approval that describes plans for preventing any such future incidents.

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12. The Contractor's reports required in the preceding paragraphs shall include the following information regarding the security incident, improper disclosure/use, or breach (hereinafter "incident"):

     a. The name, address, and telephone number of each individual whose information was involved if such information is maintained by the Contractor;

     b. The electronic address of any individual who has specified a preference of contact by electronic mail;

     c. A brief description of what happened, including the date(s) of the incident and the date(s) of the discovery of the incident;

     d. A description of the types of Protected Health Information involved in the incident (such as full name, Social Security Number, date of birth, home address, account number, or disability code) and whether the incident involved Unsecured Protected Health Information; and

     e. The recommended steps individuals should take to protect themselves from potential harm resulting from the incident.

13. Notwithstanding any provisions of the Terms and Conditions attached hereto, in order to meet the requirements under HIPAA and the regulations promulgated thereunder, the Contractor shall keep and retain adequate, accurate, and complete records of the documentation required under these provisions for a minimum of six (6) years as specified in 45 CFR Part 164.

14. The Contractor shall not directly or indirectly receive remuneration in exchange for any Protected Health Information without a valid authorization.

15. If the Contractor becomes aware of a pattern of activity or practice of the commonwealth agency that constitutes a material breach of contract regarding the commonwealth agency's obligations under the Business Associate Provisions of the contract, the Contractor shall notify the commonwealth agency's Security Officer of the activity or practice and work with the commonwealth agency to correct the breach of contract.

16. The Contractor shall indemnify the commonwealth agency from any liability resulting from any violation of the Privacy Rule or Security Rule or Breach arising from the conduct or omission of the Contractor or its employee(s), agent(s) or subcontractor(s). The Contractor shall reimburse the commonwealth agency for any and all actual and direct costs and/or losses, including those incurred under the civil penalties implemented by legal requirements, including but not limited to HIPAA as amended by the Health Information Technology for Economic and Clinical Health Act, and including reasonable attorney's fees, which may be imposed upon the commonwealth agency under legal requirements, including but not limited to HIPAA's Administrative Simplification Rules, arising from or in connection with the Contractor's negligent or wrongful actions or inactions or violations of this Agreement.

4.7.1. Obligations of the Commonwealth Agency

1. The commonwealth agency shall notify the Contractor of limitation(s) that may affect the Contractor's use or disclosure of Protected Health Information, by providing the Contractor with the commonwealth agency's notice of privacy practices in accordance with 45 CFR 164.520.

2. The commonwealth agency shall notify the Contractor of any changes in, or revocation of, authorization by an Individual to use or disclose Protected Health Information.

3. The commonwealth agency shall notify the Contractor of any restriction to the use or disclosure of Protected Health Information that the commonwealth agency has agreed to in accordance with 45 CFR 164.522.

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4. The commonwealth agency shall not request the Contractor to use or disclose Protected Health Information in any manner that would not be permissible under HIPAA and the regulations promulgated thereunder.

5. Expiration/Termination/Cancellation - Except as provided in the subparagraph below, upon the expiration, termination, or cancellation of the contract for any reason, the Contractor shall, at the discretion of the commonwealth agency, either return to the commonwealth agency or destroy all Protected Health Information received by the Contractor from the commonwealth agency, or created or received by the Contractor on behalf of the commonwealth agency, and shall not retain any copies of such Protected Health Information. This provision shall also apply to Protected Health Information that is in the possession of a subcontractor or agents of the Contractor.

6. In the event the commonwealth agency determines that returning or destroying the Protected Health Information is not feasible, the Contractor shall extend the protections of the contract to the Protected Health Information for as long as the Contractor maintains the Protected Health Information and shall limit the use and disclosure of the Protected Health Information to those purposes that made return or destruction of the information infeasible. If at any time it becomes feasible to return or destroy any such Protected Health Information maintained pursuant to this paragraph, the Contractor must notify the commonwealth agency and obtain instructions from the commonwealth agency for either the return or destruction of the Protected Health Information.

7. Breach of Contract – In the event the Contractor is in breach of contract with regard to the business associate provisions included herein, the Contractor agrees that in addition to the requirements of the contract related to cancellation of contract, if the commonwealth agency determines that cancellation of the contract is not feasible, the Department may elect not to cancel the contract, but shall report the breach of contract to the Secretary of the Department of Health.

5. PROPOSAL GUIDELINES AND CONTENT

5.1. Statement of Intention to Submit a Response

Vendors are requested to **inform the Solicitation Coordinator**, as identified in **Section 1.5: RFP Communications**, of their intention to submit a response by sending a simple email or written communication. This statement or notice should include the following details:

a. Name of the business or individual (as applicable)
b. Name and title of the contact person
c. Mailing address, telephone number, facsimile number, and email address of the contact person

Submitting a Statement of Intention to Submit a Response does not create any obligations and is not a mandatory requirement for submitting a response. However, it aids in facilitating communication regarding any amendments or notifications related to the RFP. It is the responsibility of vendors to regularly monitor the official posting site of the RFP for any posted amendments or notifications, regardless of whether they have submitted a Statement of Intention to Submit a Response.

5.2. Proposal Submission

Proposals are required to be submitted by each Vendor as detailed in section **1.7: Proposal Submission Instructions**; no later than the submission deadline time and date detailed in section **1.4: RFP Process Schedule**.

5.3. RFP Communications

Vendors are required to **contact the designated Solicitation Coordinator** for all communications and questions related to this RFP as described in section **1.5: RFP Communications**.

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5.4. Amendments to the RFP

Puerto Rico Department of Health reserves the right to officially amend RFP after issuance. In the event of an RFP amendment, the PR DOH will communicate it to vendors who have submitted a Statement of Intention to Submit a Response. Vendors are required to address the revised RFP, including all its attachments, when preparing their response. It shall be the sole responsibility of the Vendor to monitor the website for such amendments.

5.5. Cancelation of the RFP

Puerto Rico Department of Health retains the exclusive authority to cancel the RFP or to cancel and reissue the RFP, at its discretion, in accordance with the applicable laws and regulations, at any given point in time.

5.6. Right of Rejection

Vendors must comply with all the terms of the RFP. The Solicitation Coordinator may reject any proposal that does not comply with all the material and substantial terms, conditions, and performance requirements of the RFP.

Minor informalities that:

a. do not affect responsiveness;
b. are merely a matter of form or format;
c. do not challenge the relative standing or otherwise prejudice other offers;
d. do not change the meaning or scope of the RFP;
e. are trivial, negligible, or immaterial in nature;
f. do not reflect a material change in the work; or
g. do not constitute a substantial reservation against a requirement or provision;

may be waived by the procurement officer.

PRDOH reserves the right to refrain from making an award if it determines that to be in its best interest.

A proposal from a debarred or suspended Vendor shall be rejected. All vendors must disclose all contracts current or past, that they have held with the Commonwealth of Puerto Rico. Failure to do so will result in disqualification.

5.7. Proposal Format

Vendors must sign the RFP cover page and, if applicable, the cover page of each addendum thereto in order to demonstrate acceptance by the Vendor of all RFP terms and conditions. Failure to do so may result in rejection of the bid.

The signed cover page from the original RFP and all signed addendums should be placed at the beginning of the bid. These forms must include an original signature (preferably signed in blue ink), no stamped signatures. The signature must be that of an individual legally authorized to sign contracts for the agency.

To facilitate the evaluation process, the Vendor is encouraged to submit bid information by sections that correspond with the individual evaluation categories described herein. The Vendor is cautioned that it is the Vendor's sole responsibility to submit the necessary information. PR DOH is under no obligation to solicit any information if it is not included in the bid. The Vendor's failure to submit information with the bid, including pricing and renewal information, may cause an adverse impact on the evaluation of the bid.

The bid should be page numbered. The bid should be typed.

In preparing a bid, the Vendor should be mindful of document preparation efforts for imaging purposes and storage capacity. The Vendor should limit bid content to items that provide substance, quality of content, and clarity of information.

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Any information submitted with the bid, regardless of the format or placement of such information, may be considered in making decisions related to the responsiveness and merit of a bid and the award of a contract.

All bids shall be considered an open record after the bids are opened and subject to the Freedom of Information Act (FOIA). Therefore, the Vendor is advised not to include any information that the Vendor does not want to be viewed by the public.

The Vendor is cautioned when submitting pre-printed terms and conditions or other types of material to make sure such documents do not contain other terms and conditions that conflict with those of the RFP and its contractual requirements. The Vendor agrees that in the event of conflict between any of the Vendor's terms and conditions and those contained in the RFP, the RFP shall govern. Taking exception to Puerto Rico DOH's terms and conditions may render a Vendor's bid non-responsive and remove it from consideration for award.

The Vendor hereby covenants that at the time of the submission of the bid, the Vendor has no other contractual relationship that would create any actual or perceived conflict of interest. The Vendor further agrees that during the term of the contract, neither the Vendor nor any of its employees shall acquire any other contractual relationships that create such a conflict.

Vendors must submit proposals in two (2) distinct parts: technical and cost, as stated in section **1.7: Proposal Submission Instructions**. Each part must include and be organized in the following manner:

Proposal Part	Template Response	Evaluation
Technical Proposal	Exhibit A: Submittal Documents	
Components:	Signed Cover Sheet Signed Addendums Table of Contents Executive Summary Subcontractor Letters	Mandatory
Technical Proposal	Exhibit B: Vendor Qualifications and Experience	
Components:	Company Overview Vendor Qualification (Section 3.5.1) Existing Business Relationships with Puerto Rico Business Disputes References	15 points
Technical Proposal	Exhibit C: Vendor Organization & Staffing	
Components:	Corporate Organization Chart Project Organization Chart Roles and Responsibilities Chart Initial Staffing Plan Key Staff Resumes and References (Section 3.5.2.3 Resumes and References for Project Staff) Subcontract Information (Section 3.5.2.4 Subcontractors)	15 points
Technical Proposal	Exhibit D: Mandatory Requirements	

Components:	Attestations
	  a. Attestation of Compliance with Corporate and Staffing Requirements
	  b. Attestation to Compliance with Scope of Work
	  c. Attestation to Compliance with Terms and Conditions
	  d. Attestation to Software Terms and Conditions
	  e. Attestation to Compliance with Vital Records Experience
	Project Summaries
	Corporate References
		Mandatory

Technical Proposal	Exhibit E: Degree of Fit Matrices	
Components:	Response to Degree of Fit Matrices	100 points

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Proposal Part	Template Response	Evaluation
Cost Proposal	Exhibit F: Cost Proposal	
Components:	Table of Contents Executive Summary Cost Proposal Workbook	40 points
Demonstration		
Components:	Demonstration of EVRS	30 points

VENDORS SHALL NOT INCLUDE THE COST PROPOSAL OR ANY OTHER PRICING INFORMATION IN THE PROPOSAL RESPONSE. PROPOSALS CONTAINING SUCH PRICE INFORMATION IN THE PROPOSAL RESPONSE SHALL BE REJECTED AS NON-RESPONSIVE TO THE RFP. ALL OFFICIAL COST PROPOSALS MUST BE SEALED AND SUBMITTED SEPARATELY FROM THE PROPOSAL RESPONSE.

5.8. Proposal Content

The following provides a brief description of Puerto Rico DoH expectations regarding what should be included in each section of the RFP response. Vendors are encouraged to pay specific attention to "will", "shall" and "must" statements as these must be included in the response. Proposals will be evaluated based on the criteria set forth in the following sections.

Technical Proposal Exhibit A – Submittal Information

1. Cover Page - The Cover Sheet identifies the name and number of the RFP. It must also include the complete name and address of the Vendor's firm and the name, mailing address, and telephone number of the person who can bind the Vendor. The Cover Page must be signed by the person who can legally bind the Vendor. **Vendor must complete the provided form titled Exhibit A: Cover Sheet.**
2. RFP Addendum(s) – A signed copy of each addendum to this RFP.
3. Table of Contents - The Table of Contents itemizes the contents by section, subsection, and page numbers for facilitation of the evaluators' reading the proposal.
4. Executive Summary - The Executive Summary is a summarization of the contents of the Technical Proposal. The purpose of the Executive Summary is to provide the proposal evaluators with a broad but clear understanding of the entire proposal. The executive summary must confirm that the Vendor will comply with all provisions in this RFP. The executive summary should not exceed three pages.
5. Sub-Contractor Letters (if applicable) – A written statement, signed by each proposed subcontractor, which clearly verifies that the subcontractor is committed to rendering the services required by the contract.

Technical Proposal Exhibit B – Vendor Qualifications and Experience

1. Company Overview - An overview of the company and specific experience in providing work of similar size and scope. The vendor must include: (a) a list of the three (3) most relevant vital records, public health, healthcare or other governmental agency projects including: jurisdiction or entity, project start and finish dates, contract amount, scope of work, and client contact; (c) a list of failed projects, suspensions, debarments, and significant litigation.
2. Vendor Qualifications – A narrative or table that provides the details regarding mandatory qualifications as outlined in **Section 3.5: Vendor's Qualifications and Experience** of this RFP.
3. Existing Business Relationships with Puerto Rico - a list of all Puerto Rico government entities for which supplies or services have been provided at any time during the past three years, if any.
4. Business Disputes – Business disputes are considered projects in which the Vendor has chosen to stop work for a client, or the client has directed the Vendor to stop work. The Vendor must provide a narrative description of each dispute, the state contact, and the current status of the dispute.
5. References - This section will include (a) a summary of each project for which a reference is provided; (b) the actual reference provided by the client. If subcontractors were used for any of portion of the project, they must be identified and the services they provided must

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also be identified. **References are to be completed in the provided form titled PR RFP Exhibit B: Business References**.

Technical Proposal Exhibit C – Vendor Organization Structure and Staffing

1. Corporate Organization Chart – Vendors must provide a corporate organization chart.
2. Project Organization Chart - Vendors must provide an organizational chart that depicts the organizational structure of the project team, specific to the Commonwealth of Puerto Rico EVRS Project. The organizational chart must specify the personnel assigned to accomplish the work called for in this RFP, including subcontractors, if used; illustrate the lines of authority; designate the individual responsible and accountable for the completion of each component and deliverable of the RFP.
3. Roles and Responsibilities Chart - Vendors must provide a narrative description of the roles and responsibilities of the Vendor project team.
4. Initial Staffing Plan – Vendors must provide an initial staffing plan that identifies each person, including subcontractors, who will work on the contract. The following information must be provided about each person listed:
    a. Name
    b. Title
    c. Location(s) where work will be performed
    d. Work tasks and percent of the work to be performed by the individual
5. Key Staff Resumes and References – Vendors must provide resumes and references for Key staff as specified in **Section 3.5.2.3: Resumes and References for Project Staff**.
6. Subcontract Information – Vendors must provide information on any subcontractors they intend on the contract as outlined in **Section 3.5.2.4: Subcontractors**.

Technical Proposal Exhibit D – Mandatory Requirements

1. Attestations – Vendors must review and sign each attestation.
    a. Attestation of Compliance with Corporate and Staffing Requirements
    b. Attestation to Compliance with Scope of Work
    c. Attestation to Compliance with Terms and Conditions
    d. Attestation to Software Terms and Conditions
2. Project Summaries – Vendors must provide a project summary of each project for which they are submitting a reference. The information provided must include: entity, jurisdiction or agency, project start and finish dates, contract amount, scope of work, and state contact.
3. Corporate References – Vendors must provide references as per the instructions **in Section 3.5.1**.

Technical Proposal Exhibit E - Degree of Fit Matrices

Exhibit E is comprised of the following three (3) matrices that must be completed by Vendors:
- Exhibit E.1 Degree of Fit Business Requirements
    o Excel workbook contains 18 sheets
- Exhibit E.2 Degree of Fit General Requirements
    o Excel workbook contains 1 sheet
- Exhibit E.3 Degree of Fit Forms Requirements
    o Excel workbook contains 1 sheet

These matrices are intended to serve as an evaluation tool to determine the degree of fit between the Vendors' system and Puerto Rico requirements. Vendors should review the information in **Attachments A, B, and C** carefully as these provide context and information on Puerto Rico requirements.

The answers provided in these Exhibits will be incorporated into the contract of the successful Vendor. Vendors may be asked to demonstrate responses during demonstrations.

The MS Excel workbooks are password-protected except for the fields for the Vendor's responses. **DO NOT MANIPULATE THE SPREADSHEETS**. Doing so may result in disqualification. When returning the MS Excel spreadsheets, do not protect the file or the fields. The guidelines for completing the Degree of Fit Matrices can be found in the first sheet of every Excel spreadsheet above-mentioned.

Cost Proposal – Exhibit F

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1. Table of Contents - The Table of Contents itemizes the contents by section, subsection, and page numbers for facilitation of the evaluators' reading the proposal.
2. Executive Summary – The Executive Summary should provide a summary of the Cost Proposal. The Executive Summary must be limited to 2 pages and should provide any information that may be useful in understanding the Cost Proposal. Exceptions to terms and conditions, assumptions, or constraints are not allowed and will result in the disqualification of the Vendor.
3. Cost Workbook – Attachment F must be completed by each Vendor.

5.9 Proposal Format Style

   a. Font: Arial, 12-point
   b. One-inch margins
   c. Letter Paper size (8.5" x 11"), portrait orientation

5.10   Changes and Withdrawal to Proposals

The vendor assumes full responsibility for any errors or omissions in their response. It is strictly prohibited for the vendor to make any alterations or revisions to the response documents after the specified submission deadline mentioned in section **1.4: RFP Process Schedule**.

A vendor has the option to retract a submitted response before the specified submission deadline mentioned in section **1.4: RFP Process Schedule** by submitting a written request signed by an authorized representative of the vendor. In such cases, the vendor is eligible to submit a new response at any time before the submission deadline mentioned in section **1.4: RFP Process Schedule.** However, after the submission deadline, the vendor can only withdraw the entire response or a portion of it under exceptional circumstances where enforcing the response would place an unreasonably burdensome hardship on the vendor.

5.11 Multiple Proposals

It is prohibited for a vendor to submit multiple responses in varying formats or scopes, and they cannot submit separate bids as both a principal and subcontractor. In the event that a vendor does submit more than one proposal, PR DoH retains the right, as stated in section **5.6: Right to Rejection**, to reject all of the proposals.

6. EVALUATION PROCESS

All bids will be reviewed and scored by an evaluation committee.

Puerto Rico DoH reserves the right to request clarification of any portion of the Vendor's response to verify the intent of the Vendor. The Vendor is cautioned, however, that its response may be subject to acceptance or rejection without further clarification.

When evaluating a bid, Puerto Rico DoH reserves the right to consider relevant information and facts, whether gained from a bid, from a Vendor, from a Vendor's references, or from any other source.

After determining that a bid satisfies the mandatory requirements stated in the RFP, the evaluator(s) shall use both objective analysis and subjective judgment in conducting a comparative assessment of the bid in accordance with the evaluation criteria stated below. The contract shall be awarded to the bid that best meets the needs of the Department of Health Demographic Registry, regardless of price.

6.1. Evaluation Criteria and Weightage

Bid evaluation will be based on a 200-point total to be applied as follows:

Vendor Qualifications, Experience, and References (Exhibit B)	15 points
Vendor Organization & Staffing (Exhibit C)	15 points
Solution Degree of Fit (Exhibit E)	100 points
Cost (Exhibit F)	40 points
Demonstration	30 points

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6.2. Evaluation Methodology for Degree of Fit Matrices

Based on demonstrations provided by the major Vital Records system vendors, attendance at NAPHSIS conferences, and a thorough understanding of NAPHSIS use cases and the Model Law, Puerto Rico believes any Vital Records vendor can deliver a Core/base system that supports standard functionality.

Puerto Rico requires the Puerto Rico specific requirements to be included as part of this implementation project. Puerto Rico specific business rules are listed in **Section 7.2 Puerto Rico Narratives and Requirements**. Puerto Rico specific forms and reports are listed in **Section 7.4 Puerto Rico Forms, Reports, and Exports**. We recognize that some requirements may need to be configured to Puerto Rico's specification.

If you are unable to provide any of the following Puerto Rico specific functional requirements, please copy and paste the specific rule in the provided cells at the top of each corresponding spreadsheet. The Vendor Response will auto-populate with the response "Unable to provide," indicating the Vendor is unable to provide the functionality as defined in the Puerto Rico specific requirement. It is recommended, but not required, for the Vendor to provide a comment for any requirements they are unable to provide.

Bonus requirements are requirements that would be nice to have in the system, but are not required to support Puerto Rico's business. Bonus requirements are provided in **Exhibits E.1: Degree of Fit Business Requirements and E.2: Degree of Fit General Requirements** and require a response from the proposer. Bonus forms, reports, and exports/imports are provided in **Exhibit E.3 Degree of Fit Forms Requirements** and require a response from the proposer.

All Degree of Fit Matrices are designed to automatically calculate a score based on the vendor's response to each requirement. The table below lists the response options and point values based on whether the requirement is considered Puerto Rico specific or bonus.

Response Option	Point Value
Puerto Rico Specific Requirements	
Unable to Provide (automatically determined when a requirement is added to the matrix)	-2
No Answer	0
Bonus Requirements	
Yes, Can Provide	1
No, Cannot Provide	0
No Answer	-1

6.3. Proposal Evaluation Methodology

The following table provides an overview of the evaluation methodology that will be used by the committee:

Evaluators should use the guidelines listed below to assign scores. Each evaluator must be consistent from one Respondent to another and apply the same criteria to each.	
Score	**Description**
0	Respondent has not addressed any of the requests and/or has provided a response that is limited in the scope, value, or incomplete. Response did not provide a description of how the State's needs would be met.
1	Respondent has provided some details on how the request would be met. Response does not clearly indicate if all the needs of the State will be met.
2	Respondent has provided an adequate description of how the request would be met. Response indicates adequate ability to serve the needs of the State.
3	Respondent has provided good and complete description of how the request would be met. Response clearly demonstrates a high degree of ability to serve the needs of the State.

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4	**Respondent has provided a clear and compelling description of how each request would be met, with relevant supporting materials. Respondents' proposed approach frequently goes above and beyond the minimum requirements and indicates superior ability to serve the needs of the State.**

6.4 Vendor EVRS Presentations and Demonstrations

The top two (2) vendors will be invited to participate in a two and a half (2.5) hour TEAMS meeting to demonstrate their solution and to discuss the project. Key staff are required to be at the demonstrations. The agenda is itemized below.

1. Introductions – 5 minutes
2. Presentation by the Vendor of Response, including: - 30 minutes
   a. Overview of the Company
   b. Overview of Qualifications
   c. Overview of organizational structure and key staff
3. Presentation of the Proposed Core / Base System - 1 hour
   a. Death and POS
   b. Birth / Fetal Death
   c. Interoperability
4. Questions and Answers – 45 minutes

7. ATTACHMENTS

7.1. Attachment A: Information on Puerto Rico Demographic Registry Data

7.1.1. Data Conversion Activities

Data conversion is the process of transferring data from a current storage system and application to a new one while making appropriate transformations so the data fits the new database structure. Puerto Rico is transitioning from a combination of paper and electronic processes with the implementation of the EVRS. The Vital Information Tracking Application (VITA) and *Registro Demográfico* data entry system will be the primary sources of death data, *Registro Demográfico* will be the primary source of all other data for migration. While Mainframe data does exist, Puerto Rico believes that all this data has in fact been converted and exists in the *Registro Demográfico* system.

Following is a description of the various data sources maintained at the Demographic Registry organized by vital event and a suggested strategy for approaching data migration in each case.

7.1.2. Death Data

There are four sets of death data that Puerto Rico has captured in the current system over time.

1. "Basic Data" format is demographic data that were data entered into the Mainframe from 1996 – 1998. "Basic Data" also include demographic data from some original paper records that were data entered into the Mainframe. "Basic Data" records go back as far as 1885 but may not include a complete data set for any year prior to 1996. All Mainframe data were migrated to a server in 2012 and incorporated into the legacy system, *Registro Demográfico*.
2. "Old Pages" format (1998 US Standard Certificate) took effect in January 1999 through December 2014.
3. "New Pages" format (2003 US Standard Certificate) took effect in January 2015 – January 2021.
4. VITA has been in use since January 2021.

"Basic Data" and "Old Pages" have the same structure, the only difference is that some data fields are not used. "New Pages" have a different set of reference tables/dropdowns and new fields.

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All data from the legacy system, *Registro Demográfico*, were migrated to the current EDRS (VITA) for the implementation in January 2021. Although the fields collected in VITA replicate the fields collected on the "New Pages," the data structure us entirely different.

7.1.3. Birth Data

There are three sets of birth data that Puerto Rico has captured in the *Registro Demográfico* system over time.

1. "Basic Data" format was data entered into the Mainframe from 1987 – 2005. "Basic Data" also includes data from original paper records that were data entered into the Mainframe. "Basic Data" records go back as far as 1880 but may not include a complete data set for any year prior to 1987.
2. "Old Pages" format (2003 US Standard Certificate) took effect in January 1, 2006 through June 30, 2015. This certificate is known as the Revised Certificate.
3. "New Pages" format (2003 US Standard Certificate) took effect as of event date July 1, 2015 – present. This certificate is known as the Revised, Revised Certificate.

The Mainframe was migrated to a server in 2012. The current system, *Registro Demográfico*, was implemented in 2011. 100% of the mainframe birth data, including Basic Data and Old Pages, was successfully migrated and is now accessible through *Registro Demográfico*. Basic and Old Pages have the same structure, the only difference is that some data fields are not used. New pages have different reference tables/dropdowns and new fields.

Following changes in policy, additional data entry pages and data fields were added to the *Registro Demográfico* birth module. A set of adoption screens, separate from the pages used when registering a birth, were implemented September 21, 2015. Additional new screens were added for data entry and registration of births with same sex parents, the pages were implemented July 2020. Prior to implementing the same sex pages, birth registrations with same sex parents were registered with one parent and the record updated to add the second parent on the adoption screens.

7.1.4. Point of Sale Data

The *Registro Demográfico* system does not include a standard point of sale module, rather point of sale activities are performed through each individual event module. All information from point-of-sale screens is captured in a series of data tables to document issuance, security paper inventory, and voided security paper.

Payment is not tracked in the *Registro Demográfico* system. Funds are documented on paper reports. Cumulative financial reports are available in Excel format from 2010-present. In 2025, Puerto Rico created a Power App to help track security paper associated

The EDRS was implemented without a POS module. To accommodate PR's need to track point of sale activities, minimal information for issuance was captured directly in the EDRS. These data will need to be migrated, so they are linked with the death record but are recorded in the POS module for accurate financial reporting. Security paper inventory is also excluded from the EDRS. Security paper used for death was not tracked electronically from 2021-2025. The Demographic Registry has maintained paper invoices from paper delivery during this period. In 2025, PR created a Power App to help track security paper allocation and assignment for death issuance. Security paper used for birth continues to be tracked in the *Registro Demográfico* system.

7.1.5. Fetal Death Data

There are three sets of fetal death data that Puerto Rico has captured in the Registro Demográfico system over time.

1. "Basic Data" format was data entered into the Mainframe from 1996-2014 and then the Registro Demográfico system from 2015 to present. "Basic Data" format is used for events prior to 1997. "Basic Data" includes data from paper records that were data entered.
2. "Old Pages" format took effect January 1, 1997 through December 31, 2015.

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3. "New Pages" format (2003 US Standard Certificate) took effect as of event date January 1, 2016 – present.

The current system, Registro Demográfico, was implemented at the start of 2012. 100% of the mainframe fetal death data, including Basic Data and Old Pages, was successfully migrated and is now accessible through Registro Demográfico. Basic and Old Pages have the same structure, the only difference is that some data fields are not used. New pages have different reference tables/dropdowns and new fields.

7.1.6. Marriage Data

There are two sets of marriage data that Puerto Rico has captured in the *Registro Demográfico* system over time.

1. "Basic Certifications," also known as Marriage Basic (MADEP), format is used to data enter records for events prior to 2001. Basic certifications data go as far back as 1885. The format has fewer fields and validations than the current layout.
2. "Current Certifications," also known as Marriage (MATRI), format took effect January 1, 2001 and remains in use.

Marriage records are maintained in a single database table connected to five supplemental data tables and four linking tables that are used for all events in the *Registro Demográfico* system.

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7.1.7. Death Systems, Data Formats and Certificate Forms Timeline

Death Systems, Data Formats and Certificate Formats Timeline

| | 1885 - 1931 | 1932 – 1998 | 1999 - 2014 | 2015 - Present |

Systems
- SuperMicar, literals in English and Spanish, coded COD Implemented 1999
- Mainframe Death Module Implemented 1996 — 2012
- Registro Demografico Implemented 2015
- VITA Imp. 2021

Data Formats
- Migrated to VITA
- Basic Data 1932-1995
- Basic Data 1995-1998
- Old Pages 1999-2014
- New Pages 2015-2021
- VITA 2021-present
- COD Photocopy Only 1885-1960
- COD Manually Coded by Nosologist 1994-**TBD**
- SuperMicar COD Codes Uploaded to Mainframe **DATES TBD**
- COD Literals Only 2015-2021
- COD Lit. & Codes 2021-present

Certificate Formats
- Revised Certificate 2009-2014
- Revised, revised Certificate 2015-present

Legend: 100% Paper | SuperMicar | Mainframe | Registro Demografico | VITA

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7.1.8. Birth Systems, Data Formats and Certificate Forms Timeline

Birth Systems, Data Formats and Certificate Formats Timeline

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7.1.9. Fetal Death Systems, Data Formats and Certificate Forms Timeline

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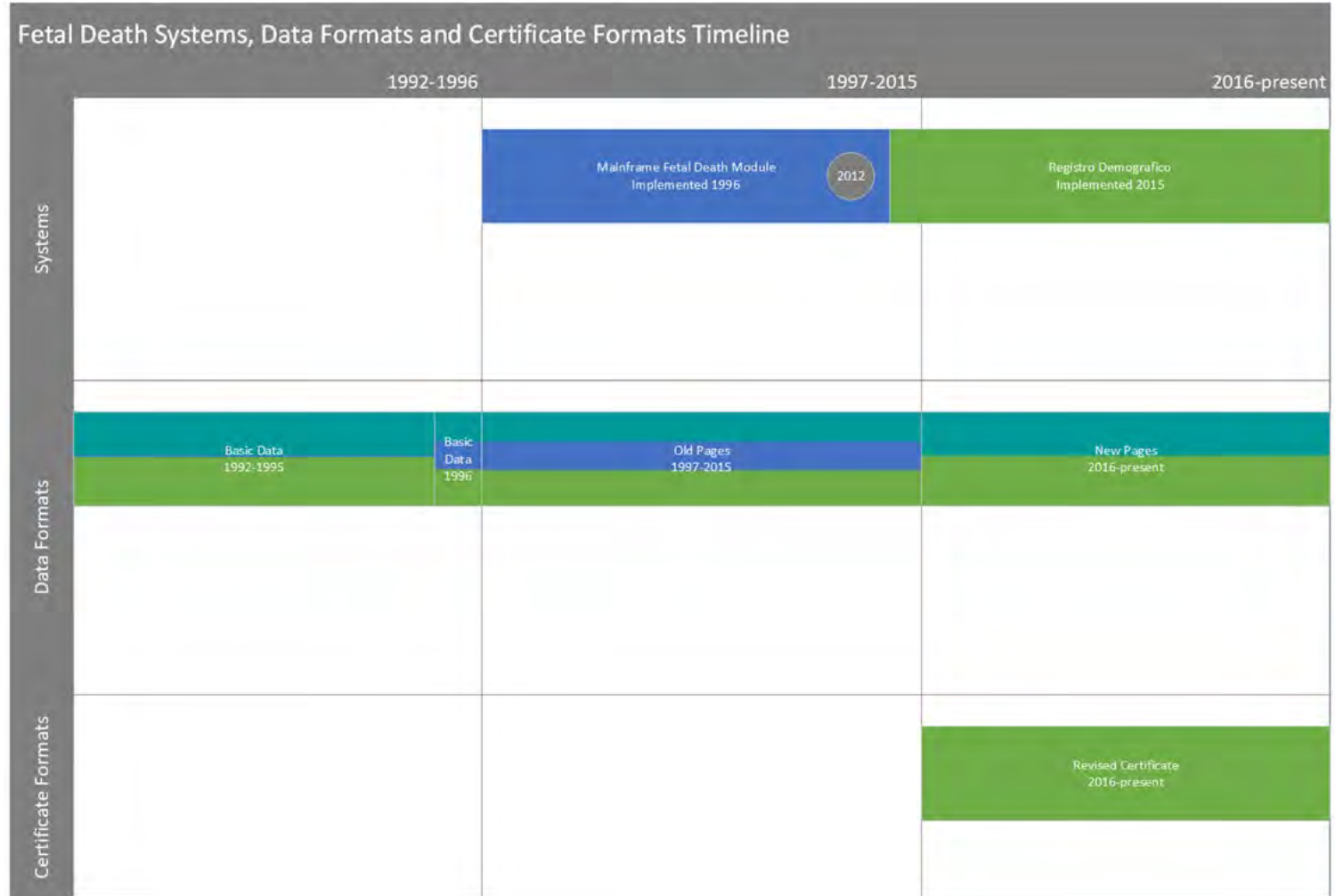
7.1.10. Marriage Systems and Data Formats Timeline

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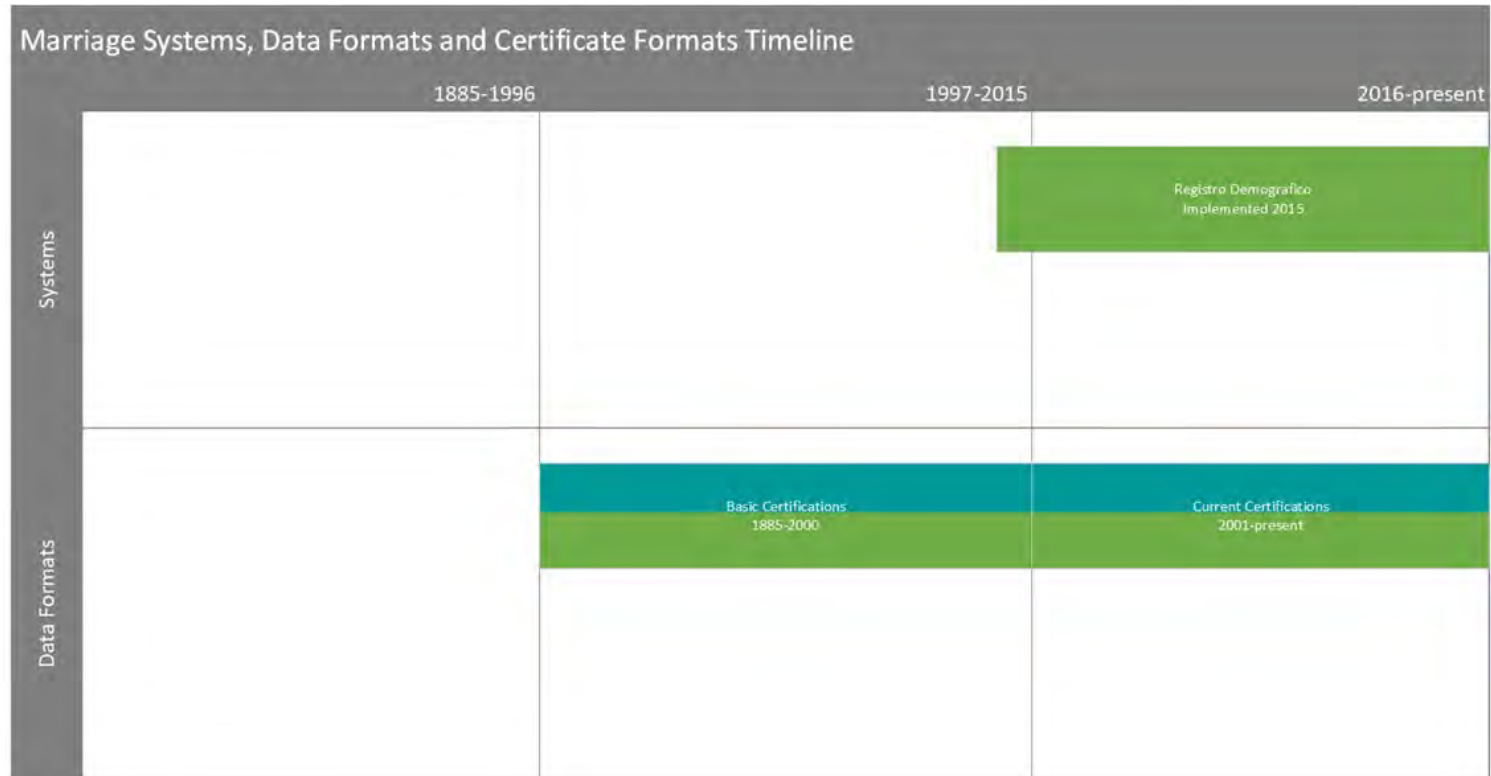
7.1.11. Industry and Occupation

Industry and occupation are a pair of fields with unique considerations for Puerto Rico due to the fact that Spanish is the primary language. The National Institute for Occupational Safety and Health (NIOSH), responsible for coding industry and occupation on vital records, has historically been unable to accept data that was not in English. To continue providing industry and occupation information, the Demographic Registry implemented drop-down lists for the industry and occupation fields reported on vital records. The drop-down lists were based on the standard coding list of industries and occupations provided by NIOSH.

7.1.12. Industry and Occupation Funeral Home Training

During registration of paper certificates, funeral home directors were trained to write a numeric code for industry and occupation on the certificate. A code book was provided to the funeral directors by the Registry for reference. The code book is available in Appendix A. Once the paper certificate was received for data entry, the code would be used by data entry staff to select the appropriate value from the drop-down list.

At go-live for the EDRS, the funeral home system users were trained to use the drop-down lists on electronic records. The drop-down lists display the numeric code and literal description. The training materials for training funeral home users in industry and occupation are available in Appendix B.

7.1.13. Industry and Occupation Evolution of Drop-Down Lists

The drop-down lists for industry and occupation evolved over time and through system changes. In both the *Registro Demográfico* system and EDRS, the numeric codes and literal descriptions are maintained in separate database fields. The codes and literals are displayed in the application interface using concatenation logic.

Below are the various drop-down lists along with the events and timeframes of use.

7.1.14. Industry and Occupation Crosswalk for Migration

At go-live with the EDRS, there was a configuration error that combined the values from the 'old pages' and 'new pages' drop-down lists. Records were filed with the combined list until a large configuration update was implemented on March 3, 2023. The use of the combined list has created data quality issues for the Demographic Registry. To resolve the issues, the Registry would like to convert as many 'old pages' values to the 'new pages' values as possible. The Registry has created a crosswalk of 'old pages' and 'new pages' values that can be mapped. The crosswalk, along with a comprehensive list of the file numbers to be corrected, is provided in 7.1.37. Crosswalk.

7.1.15. Funeral Director Paper Certificate Training Materials in Completing Industry and Occupation Fields

51a y 52 Ocupación Usual del Fallecido e Industria *(Ocupation and Industry)*

Estas preguntas tienen que ser contestadas para todos los fallecidos de 14 años de edad en adelante.

Escriba la información, aunque la persona fallecida hubiese estado retirada, incapacitada o institucionalizada al momento de la muerte.

No deje en blanco estos encasillados.

Si la persona fallecida era menor de 14 años de edad, escriba **"Menor"** en el encasillado 51a y también en el encasillado 52.

Si la persona fallecida tuvo muchas ocupaciones diferentes, puede hacer las siguientes preguntas para poder obtener mejor información:

- ¿En qué ocupación el fallecido trabajó por más tiempo?

- ¿Qué tipo de trabajo el fallecido realizó la mayor parte de su vida?

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- Si el fallecido tuvo varios trabajos durante su vida, ¿en qué trabajo estuvo por más tiempo?

Las preguntas 51 y 52 son útiles al estudiar la mortalidad relacionada a las ocupaciones y en la identificación de riesgos asociados a los trabajos.

51a. Ocupación Usual del Fallecido (Indique el tipo de trabajo realizado la mayor parte de su vida laboral. NUNCA ESCRIBA "Retirado" ni "Desempleado".)

Escriba la ocupación usual de la persona fallecida. Esto significa el tipo de trabajo en que la persona estuvo involucrada la mayor parte del tiempo de su vida productiva. No es necesariamente el trabajo de mayor remuneración económica ni el trabajo considerado el de mayor prestigio, si no aquella ocupación, que represente el mayor número de años trabajados.

Por ejemplo, la ocupación usual puede ser maestros, trabajadores de orden público, cocineros, trabajadores agrícolas, secretarios o ingenieros, por ejemplo.

Si la persona que murió estaba dedicada al trabajo de la casa/hogar, pero en algún momento trabajó fuera de la casa durante los años de vida productiva, anote dicha ocupación.

Si la persona era una persona dedicada al trabajo de la casa/hogar durante la mayor parte de su vida, o nunca trabajó fuera de la casa, escriba **"Ama/o de casa".**

Escriba **"Estudiante"** si la persona fallecida era estudiante al momento de la muerte, y nunca estuvo de forma regular empleado o nunca trabajó a tiempo completo durante su vida trabajadora.

Si la persona fallecida estaba incapacitada o institucionalizada al momento de fallecer, escriba la ocupación que tuvo si trabajó alguna vez. Si nunca trabajó escriba **"Nunca Trabajó"**.

En caso de que la persona fallecida no fuese ni estudiante ni amo/a de casa, y nunca trabajó durante su vida, escriba **"Nunca Trabajó"**.

Si no se conoce la ocupación usual del fallecido, escriba **"Desconocido"**.

Para seleccionar la ocupación adecuada, <u>debe referirse a la **Tabla A** en el apéndice de este manual</u>. Sólo debe seleccionar una ocupación de las incluidas en la Tabla A. Cuando entreviste al informante, revise la lista de ocupaciones, y a base de la descripción de la ocupación que le indique el informante, escoja y anote el código de la ocupación en el encasillado.

Por ejemplo: si la persona fallecida era maestro de escuela, escriba el código "25-2000" que corresponde a "Maestros de Educación Preescolar, Primaria, Secundaria y Especial". Si la persona fallecida era contador, escriba el código "13-2000" que corresponde a "Especialistas Financieros".

51b. Fecha en que trabajó por última vez

Escriba la fecha completa en la que la persona fallecida trabajó por última vez. Si el informante sólo puede precisar el mes y año, o el año solamente, escriba dichos datos.

Si el informante no sabe, escriba **"Desconocido".**

Si no hay un informante u otra fuente confiable de esta información, escriba **"No es obtenible"**.

51c. Cuántos años trabajó en esa ocupación

Escriba la cantidad de años que la persona fallecida trabajó en la ocupación indicada en la pregunta 51a.

Si el informante no sabe, escriba **"Desconocido".**

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Si no hay un informante u otra fuente confiable de esta información, escriba **"No es obtenible"**.

52. Tipo de industria o negocio

Escriba el tipo de negocio o industria con la cual la ocupación indicada en la pregunta 51a está relacionada. No escriba los nombres de la compañía, firma o de la organización.

Si la ocupación de la persona fallecida durante los años de vida productiva fue "amo/a de casa" y se registró "amo/a de casa" en la pregunta 51a, entonces escriba **"Hogar propio"**.

Si la persona fallecida era un estudiante al momento de la muerte y se escribió "Estudiante" como la ocupación usual del fallecido en la pregunta 51a, escriba el tipo de escuela, como por ejemplo: **"escuela superior"** o **"universidad"** en la pregunta 52 según corresponda el caso.

Si la persona fallecida estaba incapacitada o institucionalizada al momento de fallecer, nunca pudo trabajar, escriba **"Nunca Trabajó"** (al igual que en la 51a).

En caso de que la persona fallecida no fuese ni estudiante ni amo/a de casa, y nunca trabajó durante su vida, escriba "Nunca Trabajó" (al igual que en la 51a).

Si no se conoce, escriba **"Desconocido"**.

Para seleccionar la industria adecuada, <u>debe referirse a la **Tabla B** en el apéndice de este manual</u>. Sólo debe seleccionar una industria de las incluidas en la Tabla B. Cuando entreviste al informante, revise la lista de industrias, y a base de la descripción de la ocupación que le indique el informante, escoja y confirme con el informante con cuál industria estaba relacionada la ocupación. Anote el código de la industria que muestre la Tabla B.

Por ejemplo: si la persona fallecida era maestro de escuela, el código de industria correspondiente es "611" que corresponde a "Servicios educativos". Si la persona fallecida era contador, escriba el código "541" que corresponde a "Servicios profesionales, científicos y técnicos".

Esta información es útil para estudiar las muertes relacionadas a los trabajos y poder identificar cualquier riesgo nuevo. Por ejemplo, la conexión entre enfermedad pulmonar y cáncer de pulmón y la exposición al asbesto en trabajos como la fabricación de barcos o en la construcción fue descubierta analizando este tipo de información en los certificados de defunción.

Tabla A - Definiciones de las Clasificaciones Ocupacionales (SOC)

11-00 Ocupaciones Gerenciales

    11-10 Altos Ejecutivos

    11-20 Gerentes de Publicidad, Mercadeo, Promociones, Relaciones Públicas y Ventas

    11-30 Gerentes de Operaciones Especializadas

    11-90 Otras Ocupaciones Gerenciales

13-00 Ocupaciones Relacionadas con Operaciones Comerciales y Financieras

    13-10 Especialistas en Operaciones Comerciales

    13-20 Especialistas Financieros

15-00 Ocupaciones Relacionadas con las Ciencias Matemáticas y de la Computación

    15-11 Ocupaciones Relacionadas con la Computación

    15-20 Ocupaciones Relacionadas con las Ciencias Matemáticas

17-00 Ocupaciones Relacionadas con la Arquitectura y la Ingeniería

    17-10 Arquitectos, Agrimensores y Cartógrafos

    17-20 Ingenieros

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17-30 Delineantes, Técnicos en Ingeniería y Técnicos en Cartografía

19-00 Ocupaciones Relacionadas con las Ciencias Biológicas, Físicas y Sociales

19-10 Científicos Especializados en Ciencias Biológicas

19-20 Científicos Físicos

Tabla A - Definiciones de las Clasificaciones Ocupacionales (SOC)

19-30 Científicos Sociales y Trabajadores Relacionados

19-40 Técnicos en Ciencias Biológicas, Físicas y Sociales

21-00 Ocupaciones Relacionadas con Servicios Comunitarios y Sociales

21-10 Consejeros, Trabajadores Sociales y Otros Especialistas en Servicios Comunitarios y Sociales

21-20 Trabajadores Religiosos

23-00 Ocupaciones Relacionadas con el Derecho

23-10 Abogados, Jueces y Trabajadores Relacionados

23-20 Trabajadores de Asistencia Legal

25-00 Ocupaciones Relacionadas con la Educación, Capacitación y Bibliotecología

25-10 Profesores de Nivel Postsecundario

25-20 Maestros de Educación Preescolar, Primaria, Secundaria y Especial

25-30 Otros Maestros e Instructores

25-40 Archiveros, Curadores y Técnicos de Museo

25-90 Otras Ocupaciones Relacionadas con la Educación, Capacitación y Bibliotecología

27-00 Ocupaciones Relacionadas con las Artes, Diseño, Entretenimiento, Deportes y Medios de Difusión

27-10 Trabajadores de Arte y Diseño

27-20 Animadores e Intérpretes Artísticos, Deportistas y Trabajadores Relacionados

27-30 Trabajadores de Medios de Difusión y Comunicación

27-40 Trabajadores de Equipos de Medios de Difusión y Comunicación

29-00 Ocupaciones Profesionales y Técnicas Relacionadas con el Cuidado de la Salud

29-10 Profesionales de Diagnóstico y Tratamiento Médico

29-20 Tecnólogos y Técnicos de Salud

29-90 Otras Ocupaciones Profesionales y Técnicas Relacionadas con el Cuidado de la Salud

31-00 Ocupaciones de Apoyo Relacionadas con el Cuidado de la Salud

31-10 Auxiliares de Enfermería, Psiquiatría y Atención en el Hogar

31-20 Asistentes y Auxiliares de Terapia Ocupacional y de Fisioterapeutas

31-90 Otras Ocupaciones de Apoyo Relacionadas con el Cuidado de la Salud

33-00 Ocupaciones Relacionadas con Servicios de Protección

33-10 Supervisores de Trabajadores de Servicios de Protección

33-20 Trabajadores de Extinción y Prevención de Incendios

33-30 Trabajadores del Orden Público

33-90 Otros Trabajadores de Servicios de Protección

35-00 Ocupaciones Relacionadas con la Preparación y Servicio de Comidas

Tabla A - Definiciones de las Clasificaciones Ocupacionales (SOC)

35-10 Supervisores de Trabajadores de Preparación y Servicio de Comidas

35-20 Cocineros y Trabajadores de Preparación de Comidas

35-30 Trabajadores de Servicio de Comidas y Bebidas

35-90 Otros Trabajadores Relacionados con la Preparación y Servicio de Comidas

37-00 Ocupaciones de Limpieza y Mantenimiento de Edificios y Áreas Verdes

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37-10 Supervisores de Trabajadores de Limpieza y Mantenimiento de Edificios y Áreas Verdes

37-20 Trabajadores de Limpieza de Edificios y de Control y Exterminación de Plagas

37-30 Trabajadores de Mantenimiento de Áreas Verdes

39-00 Ocupaciones Relacionadas con el Cuidado y Servicio Personal

39-10 Supervisores de Trabajadores de Ocupaciones Relacionadas con el Cuidado y Servicio Personal

39-20 Trabajadores de Cuidado y Servicio de Animales

39-30 Asistentes de Establecimientos de Entretenimiento y Trabajadores Relacionados

39-40 Trabajadores de Servicios Fúnebres

39-50 Trabajadores de Servicios de Apariencia Personal

39-60 Maleteros, Botones y Porteros

39-70 Guías de Excursiones y Viajes

39-90 Otros Trabajadores de Ocupaciones Relacionadas con el Cuidado y Servicio Personal

41-00 Ventas y Ocupaciones Relacionadas

41-10 Supervisores de Trabajadores de Ventas

41-20 Trabajadores de Ventas Minoristas

41-30 Representantes de Venta de Servicios

41-40 Representantes de Ventas Mayoristas y de Productos Manufacturados

41-90 Otros Trabajadores de Ventas y Ocupaciones Relacionadas

43-00 Ocupaciones de Oficina y de Apoyo Administrativo

43-10 Supervisores de Empleados de Oficina y de Apoyo Administrativo

43-20 Operadores de Equipos de Comunicaciones

43-30 Empleados de Oficina de Servicios Financieros

43-40 Empleados de Oficina de Información y Registro

43-50 Trabajadores de Registro, Programación, Despacho y Distribución de Material

43-60 Secretarios y Asistentes Administrativos

43-90 Otros Empleados de Oficina y de Apoyo Administrativo

45-00 Ocupaciones Relacionadas con la Agricultura, la Pesca y la Silvicultura

45-10 Supervisores de Trabajadores de Ocupaciones Relacionadas con la Agricultura, la Pesca y la Silvicultura

Tabla A - Definiciones de las Clasificaciones Ocupacionales (SOC)

45-20 Trabajadores Agrícolas

45-30 Trabajadores de Pesca y Caza

45-40 Trabajadores Forestales, de Conservación y de Tala Forestal

47-00 Ocupaciones Relacionadas con la Construcción y la Extracción

47-10 Supervisores de Trabajadores de Ocupaciones Relacionadas con la Construcción y la Extracción

47-20 Trabajadores de Oficios de Construcción

47-30 Ayudantes de Oficios de la Construcción

47-40 Otros Trabajadores de la Construcción y Trabajadores Relacionados

47-50 Trabajadores de Ocupaciones Relacionadas con la Extracción

49-00 Ocupaciones Relacionadas con la Instalación, Mantenimiento y Reparación

49-10 Supervisores de Trabajadores de Ocupaciones Relacionadas con Instalación, Mantenimiento y Reparación

49-20 Mecánicos, Instaladores y Reparadores de Equipos Eléctricos y Electrónicos

49-30 Mecánicos, Instaladores y Reparadores de Vehículos y Equipo Móvil

49-90 Otras Ocupaciones Relacionadas con la Instalación, Mantenimiento y Reparación

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51-00 Ocupaciones Relacionadas con la Producción

51-10 Supervisores de Trabajadores de Ocupaciones Relacionadas con la Producción

51-20 Ensambladores y Fabricadores

51-30 Trabajadores Relacionados con el Procesamiento de Alimentos

51-40 Trabajadores Relacionados con la Producción, Metal y Plástico

51-50 Trabajadores de Imprenta

51-60 Trabajadores Textiles, de Indumentaria y Accesorios

51-70 Trabajadores de Ebanistería y Carpintería

51-80 Operadores de Planta y Sistema

51-90 Otras Ocupaciones Relacionadas con la Producción

53-00 Ocupaciones Relacionadas con el Transporte y con el Traslado de Materiales

53-10 Supervisores de Trabajadores de Ocupaciones Relacionadas con Transporte y con Traslado de Materiales

53-20 Trabajadores de Transporte Aéreo

53-30 Operadores de Vehículos de Motor

53-40 Trabajadores de Transporte Ferroviario

53-50 Trabajadores de Transporte por Agua

53-60 Otros Trabajadores Relacionados con el Transporte

53-70 Trabajadores Relacionados con el Traslado de Materiales

55-00 Ocupaciones Específicas de las Fuerzas Armadas

Tabla A - Definiciones de las Clasificaciones Ocupacionales (SOC)

55-10 Oficiales Superiores de las Fuerzas Armadas de Operaciones Especiales y Tácticas

55-20 Supervisores Directos de Personal Militar Enlistado

55-30 Especialistas en Operaciones Tácticas y Aéreas /Armas y Miembros de Tripulación

Tabla B – Industria (NAICS 2012)

110 Agricultura, cría y explotación de animales, aprovechamiento forestal, pesca y caza

111 Agricultura

112 Cría y explotación de animales

113 Aprovechamiento forestal

114 Pesca, caza y captura

115 Otros servicios relacionados con las actividades agropecuarias y forestales

210 Minería

211 Extracción de petroleo y gas

212 Minería de minerales metálicos y no metálicos, excepto petróleo y gas

213 Servicios de apoyo relacionados con la minería

220 Generación, transmisión y distribución de energía eléctrica, suministro de agua y de gas por ductos al consumidor final

221 Generación, transmisión y distribución de energía eléctrica, suministro de agua y de gas por ductos al consumidor final

230 Construcción

236 Construcción de edificios

237 Construcción de ingeniería pesada y civil

238 Contratistas especializados para la construcción

310 Industrias manufactureras

311 Alimentos

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312 Bebidas y productos de tabaco

313 Manufactura de tejidos

314 Productos textiles

315 Ropa

316 Cuero y productos relacionados

321 Productos de madera

322 Productos de papel

323 Impresión y actividades relacionadas

324 Productos de petróleo y carbón

325 Químicos

Tabla B – Industria (NAICS 2012)

326 Productos de goma y plástico

327 Productos a base de minerales no metálicos

331 Productos de metal primario

332 Productos fabricados de metal

333 Maquinaria

334 Computadoras y equipo electrónico

335 Equipo, enseres y componentes eléctricos

336 Equipo de transportación

337 Muebles y productos relacionados

339 Industrias manufactureras misceláneas

420 Comercio al por mayor

423 Bienes duraderos

424 Bienes no duraderos

425 Mercados electrónicos, agentes y corredores

440 Comercio al por menor

441 Distribuidores de piezas y de vehículos de motor

442 Mueblerías y establecimientos de accesorios para el hogar

443 Tiendas de equipo y enseres electrónicos

444 Distribuidores de materiales de construcción, equipo y accesorios para jardinería

445 Tiendas de bebidas y comestibles

446 Tiendas dedicadas a la venta de productos para el cuidado personal y de la salud.

447 Estaciones de gasolina

448 Tiendas de ropa y accesorios

451 Tiendas de artículos deportivos, de entretenimiento, libros y música

452 Tiendas de mercancía general

453 Tiendas de artículos misceláneos

454 Venta al detal sin local

480 Transportes, correos y almacenamiento

481 Transportación aérea

483 Transportación marítima

484 Transportación de carga por carretera

485 Transportación de pasajeros por carretera

486 Transportación por tuberías

487 Transportación turística

488 Servicios de apoyo relacionados con la transportación

Tabla B – Industria (NAICS 2012)

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492 Servicio de mensajería

493 Almacenaje

510 Información en medios masivos

511 Publicación (excepto por internet)

512 Grabación de películas y sonido

515 Medios de difusión (excepto por internet)

517 Telecomunicaciones

518 Proveedores de servicio de internet, portales de búsqueda y servicios de procesar información

519 Otros servicios de información

520 Servicios financieros y de seguros

521 Banca central y Autoridades Monetarias

522 Instituciones de crédito y actividades relacionadas

523 Valores, contratos de bienes y otras inversiones financieras y actividades relacionadas

524 Corredores de seguros y actividades relacionadas

525 Fondos, fideicomisos y otras actividades financieras

530 Bienes raíces y arrendamiento

531 Bienes raíces

532 Servicios de arrendamiento

533 Alquiler de bienes intangibles no financiables (excepto aquellos con derechos de autor)

540 Servicios profesionales, científicos y técnicos

541 Servicios profesionales, científicos y técnicos (eje. Servicios de: legales-notaria, contabilidad-contribuciones, arquitectos, ingeniería, diseño-gráfico-computadoras-interiores,

científicos investigación y desarrollo, publicidad y mercadeo, entre otros.)

550 Administración de Empresas y Compañías

551 Administración de empresas y de compañías

560 Servicios de apoyo a los negocios y manejo de desechos y servicios de remediación

561 Servicios administrativos y de apoyo

562 Servicios de manejo de desperdicios y de descontaminación

610 Servicios educativos

611 Servicios educativos

620 Servicios de salud y de asistencia social

621 Servicios ambulatorios para el cuidado de la salud (eje. oficinas médicas, laboratorios,

centros radiológicos)

622 Hospitales

Tabla B – Industria (NAICS 2012)

623 Casas de convalescencia

624 Ayuda social

710 Servicios de esparcimiento culturales y deportivos, y otros servicios recreativos

711 Producción de espectáculos artísticos, deportivos e industrias relacionadas

712 Museos, lugares históricos e instituciones similares

713 Industrias de diversión, de juegos de azar y de recreación

720 Servicios de alojamiento temporal y de preparación de alimentos y bebidas

721 Alojamiento

722 Lugares de servicio de alimentos y bebidas

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810 Otros servicios excepto actividades gubernamentales

811 Reparación y mantenimiento

812 Servicios para el cuidado personal y de lavandería

813 Organizaciones religiosas, caritativas, cívicas, profesionales y relacionadas

920 Administración Públca- Actividades legislativas, gubernamentales, de impartición de justicia y de organismos internacionales y extraterritoriales

921 Servicios de apoyo al poder ejecutivo, legislativo y gubernamental

922 Servicios de justicia, orden público y seguridad

923 Administración de recursos humanos

924 Administración de programas de calidad ambiental

925 Administración de programas de vivienda, planificación urbana y desarrollo comunitario

926 Administración de programas para el desarrollo económico

927 Investigación del Espacio y Tecnología

928 Seguridad Nacional y Asuntos Internacionales

7.1.16. Funeral Home Users VITA EDRS Training Materials in Completing Industry and Occupation Fields

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7.1.17. Registro Demográfico 'Old Pages' Drop-Downs

Occupation – 'Old Pages'		
ID	**Spanish Description**	**English Description**
000	PROFESIONAL O TRABAJO TECNICO	TECHNICAL WORKER
075	MÉDICO	MEDICAL DOCTOR
100	AGRICULTOR	FARMER
200	SUPERVISOR(A)	SUPERVISOR
300	CHOFER O CONDUCTOR	DRIVER OR DRIVER
315	CONTRATISTA	CONTRACTOR
320	EMPLEADO GENERAL	GENERAL EMPLOYEE
321	EMPLEADO GENERAL RESTAURANT	GENERAL EMPLOYEE RESTAURANT
330	OPERADOR EQUIPO PESADO	HEAVY EQUIPMENT OPERATOR
340	MECANICO	MECHANICAL
350	EMPLEADO DE ALMACEN	WAREHOUSE EMPLOYEE
360	OFICINISTA O RECEPCIONISTA	OFFICER OR RECEPTIONIST
375	PROGRAMADOR O DATA ENTRY	PROGRAMMER OR DATA ENTRY
380	RETIRADO O INCAPACITADO	REMOVED OR DISABLED
400	VENDEDOR(A)	SALESWOMAN
500	OBRERO O ALBAÑIL	WORKER OR MASONRY
700	AMA DE LLAVES	HOUSEKEEPER
85	PROFESIONAL O TRABAJO TECNICO	PROFESSIONAL OR TECHNICAL WORK
900	MESERO (A)	WAITER
902	ABOGADO	ATTORNEY
907	COMERCIANTE	BUSINESSMAN
908	CAJERO(A)	CASHIER
909	GERENTE	MANAGER
910	CONTABLE	ACCOUNTANT
911	SECRETARIA	SECRETARY
912	EJECUTIVO	EXECUTIVE
913	BANQUERO	BANKER
914	MILITAR	MILITARY
915	DENTISTA	DENTIST
917	MAESTRA(O)	TEACHER
918	PROFESOR(A)	PROFESSOR
919	ASISTENTE DE MAESTRO(A)	TEACHER ASSISTANT
920	HANDYMAN	HANDYMAN
921	GUARDIA DE SEGURIDAD	SECURITY GUARD
922	JARDINERO	GARDENER
923	SERVICIO AL CLIENTE	CUSTOMER SERVICE
924	TECNICO SOCIOPENAL	SOCIOPENAL TECHNICIAN
925	EMPLEADA DOMESTICA	DOMESTIC EMPLOYEE
926	GUARDIA PENAL	PENAL GUARD
927	ENFERMERA(O)	NURSE
928	TECNÓLOGO MÉDICO	MEDICAL TECHNOLOGIST
929	POLICIA	POLICE

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Occupation – 'Old Pages'		
ID	**Spanish Description**	**English Description**
930	BOMBERO	FIREMAN
931	OFICIAL DE CUSTODIA	CUSTODY OFFICER
932	EMPLEADO MANTENIMIENTO	EMPLOYEE MAINTENANCE
933	COCINERO O CHEF	COOK OR CHEF
934	INGENIERO	ENGINEER
DDD	DESEMPLEADO(A)	UNEMPLOYED
EEE	ESTUDIANTE	STUDENT
VVV	AMA DE CASA	Housewife
XXX	OCUPACION NO REPORTADA	OCCUPATION NOT REPORTED

Industry – 'Old Pages'		
ID	**Spanish Description**	**English Description**
100	GOBIERNO	GOVERNMENT
200	EMPRESA PRIVADA	PRIVATE COMPANY
300	POR SU CUENTA	ON YOUR OWN
400	VOLUNTARIO	VOLUNTARY
EEE	INSTITUTO Ó UNIVERSIDAD	INSTITUTE OR UNIVERSITY
HHH	EN EL HOGAR	IN THE HOME
VVV	NO APLICA	NO APPLICABLE
XXX	DESCONOCIDO	UNKNOWN

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7.1.18. Registro Demográfico New Pages Drop-Downs

Occupation – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
1100	Ocupaciones Gerenciales	Management Occupations
1110	Altos Ejecutivos	Senior Executives
1120	Gerentes de Publicidad, Mercadeo, Promociones, Relaciones Públicas y Ventas	Advertising, Marketing, Promotions, Public Relations and Sales Managers
1130	Gerentes de Operaciones Especializadas	Specialized Operations Managers
1190	Otras Ocupaciones Gerenciales	Other Management Occupations
1300	Ocupaciones Relacionadas con Operaciones Comerciales y Financieras	Occupations Related to Commercial and Financial Operations
1310	Especialistas en Operaciones Comerciales	Business Operations Specialists
1320	Especialistas Financieros	Financial Specialists
1500	Ocupaciones Relacionadas con las Ciencias Matemáticas y de la Computación	Occupations Related to Mathematical and Computer Sciences
1511	Ocupaciones Relacionadas con la Computación	Computer Related Occupations
1520	Ocupaciones Relacionadas con las Ciencias Matemáticas	Occupations Related to Mathematical Sciences
1700	Ocupaciones Relacionadas con la Arquitectura y la Ingeniería	Occupations Related to Architecture and Engineering
1710	Arquitectos, Agrimensores y Cartógrafos	Architects, Surveyors and Cartographers
1720	Ingenieros	Engineers
1730	Delineantes, Técnicos en Ingeniería y Técnicos en Cartografía	Draftsmen, Engineering Technicians and Cartography Technicians
1900	Ocupaciones Relacionadas con las Ciencias Biológicas, Físicas y Sociales	Occupations Related to Biological, Physical and Social Sciences
1910	Científicos Especializados en Ciencias Biológicas	Specialized Scientists in Biological Sciences

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Occupation – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
1920	Científicos Físicos	Physical Scientists
1930	Científicos Sociales y Trabajadores Relacionados	Social Scientists and Related Workers
1940	Técnicos en Ciencias Biológicas, Físicas y Sociales	Technicians in Biological, Physical and Social Sciences
2100	Ocupaciones Relacionadas con Servicios Comunitarios y Sociales	Occupations Related to Community and Social Services
2110	Consejeros, Trabajadores Sociales y Otros Especialistas en Servicios Comunitarios y Sociales	Counselors, Social Workers and Other Specialists in Community and Social Services
2120	Trabajadores Religiosos	Religious Workers
2300	Ocupaciones Relacionadas con el Derecho	Law Related Occupations
2310	Abogados, Jueces y Trabajadores Relacionados	Lawyers, Judges and Related Workers
2320	Trabajadores de Asistencia Legal	Legal Aid Workers
2500	Ocupaciones Relacionadas con la Educación, Capacitación y Bibliotecología	Occupations Related to Education, Training and Library Science
2510	Profesores de Nivel Postsecundario	Postsecondary Level Teachers
2520	Maestros de Educación Preescolar, Primaria, Secundaria y Especial	Preschool, Primary, Secondary and Special Education Teachers
2530	Otros Maestros e Instructores	Other Teachers and Instructors
2540	Archiveros, Curadores y Técnicos de Museo	Archivists, Curators and Museum Technicians
2590	Otras Ocupaciones Relacionadas con la Educación, Capacitación y Bibliotecología	Other Occupations Related to Education, Training and Library Science
2700	Ocupaciones Relacionadas con las Artes, Diseño, Entretenimiento, Deportes y Medios de Difusión	Occupations Related to the Arts, Design, Entertainment, Sports and Broadcast Media
2710	Trabajadores de Arte y Diseño	Art and Design Workers
2720	Animadores e Intérpretes Artísticos, Deportistas y Trabajadores Relacionados	Entertainers and Artistic Interpreters, Athletes and Related Workers

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Occupation – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
2730	Trabajadores de Medios de Difusión y Comunicación	Media and Communication Workers
2740	Trabajadores de Equipos de Medios de Difusión y Comunicación	Media and Communication Equipment Workers
2900	Ocupaciones Profesionales y Técnicas Relacionadas con el Cuidado de la Salud	Professional Occupations and Techniques Related to Health Care
2910	Profesionales de Diagnóstico y Tratamiento Médico	Medical Diagnosis and Treatment Professionals
2920	Tecnólogos y Técnicos de Salud	Technologists and Health Technicians
2990	Otras Ocupaciones Profesionales y Técnicas Relacionadas con el Cuidado de la Salud	Other Professional and Technical Occupations Related to Health Care
3100	Ocupaciones de Apoyo Relacionadas con el Cuidado de la Salud	Support Occupations Related to Health Care
3110	Auxiliares de Enfermería, Psiquiatría y Atención en el Hogar	Nursing, Psychiatry and Home Care Aides
3120	Asistentes y Auxiliares de Terapia Ocupacional y de Fisioterapeutas	Assistants and Auxiliaries of Occupational Therapy and Physiotherapists
3190	Otras Ocupaciones de Apoyo Relacionadas con el Cuidado de la Salud	Other Support Occupations Related to Health Care
3300	Ocupaciones Relacionadas con Servicios de Protección	Occupations Related to Protective Services
3310	Supervisores de Trabajadores de Servicios de Protección	Protective Services Worker Supervisors
3320	Trabajadores de Extinción y Prevención de Incendios	Extinction and Fire Prevention Workers
3330	Trabajadores del Orden Público	Public Order Workers
3390	Otros Trabajadores de Servicios de Protección	Other Protective Services Workers
3500	Ocupaciones Relacionadas con la Preparación y Servicio de Comidas	Occupations Related to Food Preparation and Serving

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Occupation – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
3510	Supervisores de Trabajadores de Preparación y Servicio de Comidas	Food Preparation and Service Worker Supervisors
3520	Cocineros y Trabajadores de Preparación de Comidas	Cooks and Food Preparation Workers
3530	Trabajadores de Servicio de Comidas y Bebidas	Food and Beverage Service Workers
3590	Otros Trabajadores Relacionados con la Preparación y Servicio de Comidas	Other Workers Related to Food Preparation and Serving
3700	Ocupaciones de Limpieza y Mantenimiento de Edificios y Áreas Verdes	Cleaning and Maintenance Occupations of Buildings and Green Areas
3710	Supervisores de Trabajadores de Limpieza y Mantenimiento de Edificios y Áreas Verdes	Supervisors of Cleaning and Maintenance Workers of Buildings and Green Areas
3720	Trabajadores de Limpieza de Edificios y de Control y Exterminación de Plagas	Building Cleaning and Pest Control and Extermination Workers
3730	Trabajadores de Mantenimiento de Áreas Verdes	Green Area Maintenance Workers
3900	Ocupaciones Relacionadas con el Cuidado y Servicio Personal	Occupations Related to Personal Care and Service
3910	Supervisores de Trabajadores de Ocupaciones Relacionadas con el Cuidado y Servicio Personal	Supervisors of Workers in Occupations Related to Personal Care and Service
3920	Trabajadores de Cuidado y Servicio de Animales	Animal Care and Service Workers
3930	Asistentes de Establecimientos de Entretenimiento y Trabajadores Relacionados	Entertainment Establishment Assistants and Related Workers
3940	Trabajadores de Servicios Fúnebres	Funeral Service Workers
3950	Trabajadores de Servicios de Apariencia Personal	Personal Appearance Service Workers
3960	Maleteros, Botones y Porteros	Porters, Buttons and Porters
3970	Guías de Excursiones y Viajes	Excursion and Travel Guides

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Occupation – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
3990	Otros Trabajadores de Ocupaciones Relacionadas con el Cuidado y Servicio Personal	Other Workers in Occupations Related to Personal Care and Service
4100	Ventas y Ocupaciones Relacionadas	Sales and Related Occupations
4110	Supervisores de Trabajadores de Ventas	Sales Worker Supervisors
4120	Trabajadores de Ventas Minoristas	Retail Sales Workers
4130	Representantes de Venta de Servicios	Service Sales Representatives
4140	Representantes de Ventas Mayoristas y de Productos Manufacturados	Wholesale and Manufactured Sales Representatives
4190	Otros Trabajadores de Ventas y Ocupaciones Relacionadas	Other Sales Workers and Related Occupations
4300	Ocupaciones de Oficina y de Apoyo Administrativo	Office and Administrative Support Occupations
4310	Supervisores de Empleados de Oficina y de Apoyo Administrativo	Office Employee and Administrative Support Supervisors
4320	Operadores de Equipos de Comunicaciones	Communications Equipment Operators
4330	Empleados de Oficina de Servicios Financieros	Financial Services Office Employees
4340	Empleados de Oficina de Información y Registro	Information and Registration Office Employees
4350	Trabajadores de Registro, Programación, Despacho y Distribución de Material	Registration, Programming, Dispatch and Distribution of Material Workers
4360	Secretarios y Asistentes Administrativos	Secretaries and Administrative Assistants
4390	Otros Empleados de Oficina y de Apoyo Administrativo	Other Office and Administrative Support Employees
4500	Ocupaciones Relacionadas con la Agricultura, la Pesca y la Silvicultura	Occupations Related to Agriculture, Fisheries and Forestry
4510	Supervisores de Trabajadores de Ocupaciones Relacionadas con la Agricultura, la Pesca y la Silvicultura	Supervisors of Workers in Occupations Related to Agriculture, Fisheries and Forestry
4520	Trabajadores Agrícolas	Agricultural Workers

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Occupation – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
4530	Trabajadores de Pesca y Caza	Fishing and Hunting Workers
4540	Trabajadores Forestales, de Conservación y de Tala Forestal	Forest, Conservation and Logging Workers
4700	Ocupaciones Relacionadas con la Construcción y la Extracción	Construction and Extraction Occupations
4710	Supervisores de Trabajadores de Ocupaciones Relacionadas con la Construcción y la Extracción	Supervisors of Workers in Construction and Extraction Occupations
4720	Trabajadores de Oficios de Construcción	Construction Trades Workers
4730	Ayudantes de Oficios de la Construcción	Construction Trades Helpers
4740	Otros Trabajadores de la Construcción y Trabajadores Relacionados	Other Construction Workers and Related Workers
4750	Trabajadores de Ocupaciones Relacionadas con la Extracción	Workers in Occupations Related to Extraction
4900	Ocupaciones Relacionadas con la Instalación, Mantenimiento y Reparación	Occupations Related to Installation, Maintenance and Repair
4910	Supervisores de Trabajadores de Ocupaciones Relacionadas con la Instalación, Mantenimiento y Reparación	Supervisors of Workers in Occupations Related to Installation, Maintenance and Repair
4920	Mecánicos, Instaladores y Reparadores de Equipos Eléctricos y Electrónicos	Mechanics, Installers and Repairers of Electrical and Electronic Equipment
4930	Mecánicos, Instaladores y Reparadores de Vehículos y Equipo Móvil	Mechanics, Installers and Repairers of Vehicles and Mobile Equipment
4990	Otras Ocupaciones Relacionadas con la Instalación, Mantenimiento y Reparación	Other Occupations Related to Installation, Maintenance and Repair
5100	Ocupaciones Relacionadas con la Producción	Production Related Occupations

Occupation – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
5110	Supervisores de Trabajadores de Ocupaciones Relacionadas con la Producción	Supervisors of Workers in Production-Related Occupations
5120	Ensambladores y Fabricadores	Assemblers and Manufacturers
5130	Trabajadores Relacionados con el Procesamiento de Alimentos	Food Processing Related Workers
5140	Trabajadores Relacionados con la Producción, Metal y Plástico	Workers Related to Production, Metal and Plastic
5151	Trabajadores de Imprenta	Printing Workers
5160	Trabajadores Textiles, de Indumentaria y Accesorios	Textile, Clothing and Accessories Workers
5170	Trabajadores de Ebanistería y Carpintería	Joinery and Carpentry Workers
5180	Operadores de Planta y Sistema	Plant and System Operators
5190	Otras Ocupaciones Relacionadas con la Producción	Other Occupations Related to Production
5300	Ocupaciones Relacionadas con el Transporte y con el Traslado de Materiales	Occupations Related to Transportation and Material Transfer
5310	Supervisores de Trabajadores de Ocupaciones Relacionadas con el Transporte y con el Traslado de Materiales	Supervisors of Workers in Occupations Related to Transportation and Material Transfer
5320	Trabajadores de Transporte Aéreo	Air Transport Workers
5330	Operadores de Vehículos de Motor	Motor Vehicle Operators
5340	Trabajadores de Transporte Ferroviario	Rail Transport Workers
5350	Trabajadores de Transporte por Agua	Water Transportation Workers
5360	Otros Trabajadores Relacionados con el Transporte	Other Transportation Related Workers
5370	Trabajadores Relacionados con el Traslado de Materiales	Workers Related to Moving Materials
5500	Ocupaciones Específicas de las Fuerzas Armadas	Specific Occupations of the Armed Forces

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Occupation – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
5510	Oficiales Superiores de las Fuerzas Armadas de Operaciones Especiales y Tácticas	Senior Officers of the Armed Forces of Special Operations and Tactics
5520	Supervisores Directos de Personal Militar Enlistado	Direct Supervisors of Enlisted Military Personnel
5530	Especialistas en Operaciones Tácticas y Aéreas /Armas y Miembros de Tripulación	Specialists in Tactical and Air Operations / Weapons and Crew Members
0000	Desconocido	Unknown
0100	Estudiante	Student
0101	Ama/o de casa	Homemaker
0102	Nunca trabajo	Never work
0103	Menor de 14 años	Under 14 years old

Industry – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
114	Pesca, caza y captura	Fishing, hunting and catching
115	Otros servicios relacionados con las actividades agropecuarias y forestales	Other services related to agricultural and forestry activities
210	MINERÍA (21) Minería	MINING (21) Mining
211	Extracción de petroleo y gas	Oil and gas extraction
212	Minería de minerales metálicos y no metálicos, excepto petróleo y gas	Mining of metallic and non-metallic minerals, except oil and gas
213	Servicios de apoyo relacionados con la minería	Support services related to mining

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Industry – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
220	UTILIDADES (22) Generación, transmisión y distribución de energía eléctrica, suministro de agua y de gas por ductos al consumidor final (22)	UTILITIES (22) Generation, transmission and distribution of electrical energy, water and gas supply through pipelines to the final consumer (22)
221	Generación, transmisión y distribución de energía eléctrica, suministro de agua y de gas por ductos al consumidor final	Generation, transmission and distribution of electrical energy, water and gas supply through pipelines to the final consumer
230	CONSTRUCCIÓN (23) Construcción	CONSTRUCTION (23) Construction
236	Construcción de edificios	Construction of buildings
237	Construcción de ingeniería pesada y civil	Civil and heavy engineering construction
238	Contratistas especializados para la construcción	Specialized construction contractors
310	MANUFACTURA (31-33) Industrias manufactureras	MANUFACTURE (31-33) Manufacturing industries
311	Alimentos	Foods
312	Bebidas y productos de tabaco	Beverages and tobacco products
313	Manufactura de tejidos	Fabrics manufacturing
314	Productos textiles	Textile products
315	Ropa	Clothes
316	Cuero y productos relacionados	Leather and related products
321	Productos de madera	Wood Products
322	Productos de papel	Paper Products
323	Impresión y actividades relacionadas	Printing and related activities
324	Productos de petróleo y carbón	Oil and coal products
325	Químicos	Chemicals
326	Productos de goma y plástico	Rubber and plastic products
327	Productos a base de minerales no metálicos	Non-metallic mineral based products

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Industry – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
331	Productos de metal primario	Primary metal products
332	Productos fabricados de metal	Products made of metal
333	Maquinaria	Machinery
334	Computadoras y equipo electrónico	Computers and electronic equipment
335	Equipo, enseres y componentes eléctricos	Electrical equipment, fixtures and components
336	Equipo de transportación	Transportation equipment
337	Muebles y productos relacionados	Furniture and related products
339	Industrias manufactureras misceláneas	Miscellaneous manufacturing industries
420	COMERCIO AL POR MAYOR (42) Comercio al por mayor	WHOLESALE TRADE (42) Wholesale trade
423	Bienes duraderos	Durable goods
424	Bienes no duraderos	Non-durable goods
425	Mercados electrónicos, agentes y corredores	Electronic markets, agents and brokers
440	COMERCIO AL DETAL (44-45) Comercio al por menor	RETAIL TRADE (44-45) Retail trade
441	Distribuidores de piezas y de vehículos de motor	Motor vehicle and parts dealers
442	Mueblerías y establecimientos de accesorios para el hogar	Furniture stores and home accessories stores
443	Tiendas de equipo y enseres electrónicos	Electronic stores and equipment stores
444	Distribuidores de materiales de construcción, equipo y accesorios para jardinería	Distributors of construction materials, equipment and accessories for gardening
445	Tiendas de bebidas y comestibles	Beverage and grocery stores
446	Tiendas dedicadas a la venta de productos para el cuidado personal y de la salud.	Stores dedicated to the sale of products for personal care and health.
447	Estaciones de gasolina	Gas stations
448	Tiendas de ropa y accesorios	Clothing and accessories stores

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Industry – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
451	Tiendas de artículos deportivos, de entretenimiento, libros y música	Sports, entertainment, book and music shops
452	Tiendas de mercancía general	General merchandise stores
453	Tiendas de artículos misceláneos	Miscellaneous Item Stores
454	Venta al detal sin local	Retail without premises
480	TRANSPORTACIÓN Y ALMACENAJE (48-49) Transportes, correos y almacenamiento	TRANSPORTATION AND STORAGE (48-49) Transport, mail and storage
481	Transportación aérea	Air transportation
483	Transportación marítima	Marine transportation
484	Transportación de carga por carretera	Freight transportation by road
485	Transportación de pasajeros por carretera	Transportation of passengers by road
486	Transportación por tuberías	Pipeline transportation
487	Transportación turística	Tourist transportation
488	Servicios de apoyo relacionados con la transportación	Transportation related support services
492	Servicio de mensajería	Messenger Service
493	Almacenaje	Storage
510	INFORMACIÓN (51) Información en medios masivos	INFORMATION (51) Information in the mass media
511	Publicación (excepto por internet)	Publication (except online)
512	Grabación de películas y sonido	Movie and sound recording
515	Medios de difusión (excepto por internet)	Broadcast media (except online)
517	Telecomunicaciones	Telecommunication
518	Proveedores de servicio de internet, portales de búsqueda y servicios de procesar información	Internet service providers, search portals and information processing services
519	Otros servicios de información	Other information services

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Industry – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
520	FINANZAS Y SEGUROS (52) Servicios financieros y de seguros	FINANCE AND INSURANCE (52) Financial and insurance services
521	Banca central y Autoridades Monetarias	Central banking and monetary authorities
522	Instituciones de crédito y actividades relacionadas	Credit institutions and related activities
523	Valores, contratos de bienes y otras inversiones financieras y actividades relacionadas	Securities, property contracts and other financial investments and related activities
524	Corredores de seguros y actividades relacionadas	Insurance brokers and related activities
525	Fondos, fideicomisos y otras actividades financieras	Funds, trusts and other financial activities
530	BIENES RAÍCES Y ARRENDAMIENTO (53) Servicios inmobiliarios y de alquiler de bienes muebles e intangibles	REAL ESTATE AND LEASING (53) Real estate and movable and intangible property rental services
531	Bienes raíces	Real estate
532	Servicios de arrendamiento	Leasing services
533	Alquiler de bienes intangibles no financiables (excepto aquellos con derechos de autor)	Rental of non-financeable intangible assets (except those with copyright)
540	SERVICIOS PROFESIONALES, CIENTÍFICOS Y TÉCNICOS (54) Servicios profesionales, científicos y técnicos	PROFESSIONAL, SCIENTIFIC AND TECHNICAL SERVICES (54) Professional, scientific and technical services
541	Servicios profesionales, científicos y técnicos	services professionals, scientists and technicals
550	ADMINISTRACION DE EMPRESAS Y COMPAÑÍAS (55) Corporativos	BUSINESS AND COMPANY ADMINISTRATION (55) Corporate
551	Administración de empresas y de compañías	Business and company administration
560	SERVICIOS ADMINISTRATIVOS Y DE APOYO, DE MANEJO DE DESPERDICIOS Y DEDESCONTAMINACIÓN (56)	ADMINISTRATIVE AND SUPPORT SERVICES, WASTE MANAGEMENT AND DECONTAMINATION (56)
561	Servicios administrativos y de apoyo	Administrative and support services

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Industry – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
562	Servicios de manejo de desperdicios y de descontaminación	Waste management and decontamination services
610	SERVICIOS EDUCATIVOS (61) Servicios educativos	EDUCATIONAL SERVICES (61) Educational services
611	Servicios educativos	Educational services
620	SERVICIOS PARA EL CUIDADO DE LA SALUD Y AYUDA SOCIAL (62) Servicios de salud y de asistencia social	HEALTH CARE AND SOCIAL ASSISTANCE SERVICES (62) Health and social work services
621	Servicios ambulatorios para el cuidado de la salud (eje. oficinas médicas, laboratorios, centros radiológicos)	Outpatient health care services (eg, medical offices, laboratories, radiology centers)
561	Servicios administrativos y de apoyo	Administrative and support services
562	Servicios de manejo de desperdicios y de descontaminación	Waste management and decontamination services
610	SERVICIOS EDUCATIVOS (61) Servicios educativos	EDUCATIONAL SERVICES (61) Educational services
611	Servicios educativos	Educational services
620	SERVICIOS PARA EL CUIDADO DE LA SALUD Y AYUDA SOCIAL (62) Servicios de salud y de asistencia social	HEALTH CARE AND SOCIAL ASSISTANCE SERVICES (62) Health and social work services
621	Servicios ambulatorios para el cuidado de la salud (eje. oficinas médicas, laboratorios, centros radiológicos)	Outpatient health care services (eg, medical offices, laboratories, radiology centers)
622	Hospitales	Hospitals
623	Casas de convalescencia	Convalescence Homes
624	Ayuda social	Social help
710	ARTE, ENTRETENIMIENTO Y RECREACIÓN (71) Servicios de esparcimiento culturales y deportivos, y otros servicios recreativos	ART, ENTERTAINMENT AND RECREATION (71) Cultural and sporting entertainment and other recreational services

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Industry – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
711	Producción de espectáculos artísticos, deportivos e industrias relacionadas	Production of artistic, sports and related industries shows
712	Museos, lugares históricos e instituciones similares	Museums, historical places and similar institutions
713	Industrias de diversión, de juegos de azar y de recreación	Amusement, gaming and recreation industries
720	ALOJAMIENTO Y SERVICIO DE ALIMENTOS (72) Servicios de alojamiento temporal y de preparación de alimentos y bebidas	FOOD ACCOMMODATION AND SERVICE (72) Temporary accommodation and food and beverage preparation services
721	Alojamiento	accommodation
722	Lugares de servicio de alimentos y bebidas	Food and beverage service locations
810	OTROS SERVICIOS (EXCEPTO ADMINISTRACION PUBLICA) (81) Otros servicios excepto actividades gubernamentales	OTHER SERVICES (EXCEPT PUBLIC ADMINISTRATION) (81) Other services except government activities
811	Reparación y mantenimiento	Repair and Maintenance
812	Servicios para el cuidado personal y de lavandería	Personal care and laundry services
813	Organizaciones religiosas, caritativas, cívicas, profesionales y relacionadas	Religious, charitable, civic, professional and related organizations
920	ADMINISTRACIÓN PÚBLICA (92) Actividades legislativas, gubernamentales, de impartición de justicia y de organismos internacionales y extraterritoriales	PUBLIC ADMINISTRATION (92) Legislative, governmental, law enforcement and international and extraterritorial organizations activities
921	Servicios de apoyo al poder ejecutivo, legislativo y gubernamental	Support services to the executive, legislative and governmental power
922	Servicios de justicia, orden público y seguridad	Justice, public order and security services
923	Administración de recursos humanos	Human resources management
924	Administración de programas de calidad ambiental	Administration of environmental quality programs

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Industry – New Pages		
FieldValueNCHS	**Spanish ValueDescription**	**English ValueDescription**
925	Administración de programas de vivienda, planificación urbana y desarrollo comunitario	Administration of housing, urban planning and community development programs
926	Administración de programas para el desarrollo económico	Administration of programs for economic development
927	Investigación del Espacio y Tecnología	Space Research and Technology
928	Seguridad Nacional y Asuntos Internacionales	National Security and International Affairs
000	Desconocido	Unknown
001	Estudiante	Student
002	Hogar Propio	Own Home
003	Escuela Sup/Universidad	Sup School / University
004	Nunca Trabajo	Never work
005	Menor de 14 años	Under 14 years old

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7.1.19. VITA EDRS Combined Drop-Downs

The tables below represent how the drop-down lists appeared to end users in the VITA EDRS when the legacy and new pages values were combined.

Occupation
000 - 000
075 - 075
600 - 600
750 - 750
800 - 800
920 - 920
315 - ACCOUNTANT
1120 - Advertising, Marketing, Promotions, Public Relations and Sales Managers
4520 - Agricultural Workers
5320 - Air Transport Workers
3920 - Animal Care and Service Workers
1710 - Architects, Surveyors and Cartographers
2540 - Archivists, Curators and Museum Technicians
2710 - Art and Design Workers
5120 - Assemblers and Manufacturers
3120 - Assistants and Auxiliaries of Occupational Therapy and Physiotherapists
902 - ATTORNEY
930 - BANKER
3720 - Building Cleaning and Pest Control and Extermination Workers
1310 - Business Operations Specialists
910 - BUSINESSMAN
300 - CASHIER
3700 - Cleaning and Maintenance Occupations of Buildings and Green Areas
4320 - Communications Equipment Operators
1511 - Computer Related Occupations
4700 - Construction and Extraction Occupations
4730 - Construction Trades Helpers
4720 - Construction Trades Workers
907 - COOK OR CHEF

Occupation
3520 - Cooks and Food Preparation Workers
2110 - Counselors, Social Workers and Other Specialists in Community and Social Services
360 - CUSTODY OFFICER
200 - CUSTOMER SERVICE
915 - DENTIST
5520 - Direct Supervisors of Enlisted Military Personnel
350 - DOMESTIC EMPLOYEE
1730 - Draftsmen, Engineering Technicians and Cartography Technicians
933 - DRIVER OR DRIVER
927 - EMPLOYEE MAINTENANCE
922 - ENGINEER
1720 - Engineers

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2720 - Entertainers and Artistic Interpreters, Athletes and Related Workers

3930 - Entertainment Establishment Assistants and Related Workers

3970 - Excursion and Travel Guides

925 - EXECUTIVE

3320 - Extinction and Fire Prevention Workers

100 - FARMER

4330 - Financial Services Office Employees

1320 - Financial Specialists

908 - FIREMAN

4530 - Fishing and Hunting Workers

3530 - Food and Beverage Service Workers

3510 - Food Preparation and Service Worker Supervisors

5130 - Food Processing Related Workers

4540 - Forest, Conservation and Logging Workers

3940 - Funeral Service Workers

917 - GARDENER

321 - GENERAL EMPLOYEE

932 - GENERAL EMPLOYEE RESTAURANT

3730 - Green Area Maintenance Workers

934 - HANDYMAN

929 - HEAVY EQUIPMENT OPERATOR

919 - HOUSEKEEPER

Occupation

700 - Housewife

101 - Housewife

102 - I never work

4340 - Information and Registration Office Employees

5170 - Joinery and Carpentry Workers

2300 - Law Related Occupations

2310 - Lawyers, Judges and Related Workers

2320 - Legal Aid Workers

1100 - Management Occupations

921 - MANAGER

75 - MECHANICAL

4920 - Mechanics, Installers and Repairers of Electrical and Electronic Equipment

4930 - Mechanics, Installers and Repairers of Vehicles and Mobile Equipment

2740 - Media and Communication Equipment Workers

2730 - Media and Communication Workers

2910 - Medical Diagnosis and Treatment Professionals

928 - MEDICAL TECHNOLOGIST

914 - MILITARY

5330 - Motor Vehicle Operators

909 - NURSE

3110 - Nursing, Psychiatry and Home Care Aides

931 - OCCUPATION NOT REPORTED

4500 - Occupations Related to Agriculture, Fisheries and Forestry

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1700 - Occupations Related to Architecture and Engineering

1900 - Occupations Related to Biological, Physical and Social Sciences

1300 - Occupations Related to Commercial and Financial Operations

2100 - Occupations Related to Community and Social Services

2500 - Occupations Related to Education, Training and Library Science

3500 - Occupations Related to Food Preparation and Serving

4900 - Occupations Related to Installation, Maintenance and Repair

1500 - Occupations Related to Mathematical and Computer Sciences

1520 - Occupations Related to Mathematical Sciences

3900 - Occupations Related to Personal Care and Service

3300 - Occupations Related to Protective Services

Occupation

2700 - Occupations Related to the Arts, Design, Entertainment, Sports and Broadcast Media

5300 - Occupations Related to Transportation and Material Transfer

4300 - Office and Administrative Support Occupations

4310 - Office Employee and Administrative Support Supervisors

330 - OFFICER OR RECEPTIONIST

4740 - Other Construction Workers and Related Workers

1190 - Other Management Occupations

2590 - Other Occupations Related to Education, Training and Library Science

4990 - Other Occupations Related to Installation, Maintenance and Repair

5190 - Other Occupations Related to Production

4390 - Other Office and Administrative Support Employees

2990 - Other Professional and Technical Occupations Related to Health Care

3390 - Other Protective Services Workers

4190 - Other Sales Workers and Related Occupations

3190 - Other Support Occupations Related to Health Care

2530 - Other Teachers and Instructors

5360 - Other Transportation Related Workers

3990 - Other Workers in Occupations Related to Personal Care and Service

3590 - Other Workers Related to Food Preparation and Serving

920 - PENAL GUARD

3950 - Personal Appearance Service Workers

1920 - Physical Scientists

5180 - Plant and System Operators

85 - POLICE

3960 - Porters, Buttons and Porters

2510 - Postsecondary Level Teachers

2520 - Preschool, Primary, Secondary and Special Education Teachers

5151 - Printing Workers

5100 - Production Related Occupations

2900 - Professional Occupations and Techniques Related to Health Care

918 - PROFESSIONAL OR TECHNICAL WORK

375 - PROFESSOR)

380 - PROGRAMMER OR DATA ENTRY

3310 - Protective Services Worker Supervisors

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Occupation
3330 - Public Order Workers
5340 - Rail Transport Workers
4350 - Registration, Programming, Dispatch and Distribution of Material Workers
2120 - Religious Workers
911 - REMOVED OR DISABLED
4120 - Retail Sales Workers
4100 - Sales and Related Occupations
4110 - Sales Worker Supervisors
400 - SALESWOMAN
4360 - Secretaries and Administrative Assistants
923 - SECRETARY
926 - SECURITY GUARD
1110 - Senior Executives
5510 - Senior Officers of the Armed Forces of Special Operations and Tactics
4130 - Service Sales Representatives
1930 - Social Scientists and Related Workers
924 - SOCIOPENAL TECHNICIAN
5530 - Specialists in Tactical and Air Operations / Weapons and Crew Members
1130 - Specialized Operations Managers
1910 - Specialized Scientists in Biological Sciences
5500 - Specific Occupations of the Armed Forces
100 - student
3710 - Supervisors of Cleaning and Maintenance Workers of Buildings and Green Areas
4710 - Supervisors of Workers in Construction and Extraction Occupations
4510 - Supervisors of Workers in Occupations Related to Agriculture, Fisheries and Forestry
4910 - Supervisors of Workers in Occupations Related to Installation, Maintenance and Repair
3910 - Supervisors of Workers in Occupations Related to Personal Care and Service
5310 - Supervisors of Workers in Occupations Related to Transportation and Material Transfer
5110 - Supervisors of Workers in Production-Related Occupations
3100 - Support Occupations Related to Health Care
340 - TEACHER
913 - TEACHER ASSISTANT
1940 - Technicians in Biological, Physical and Social Sciences
2920 - Technologists and Health Technicians

Occupation
5160 - Textile, Clothing and Accessories Workers
103 - Under 14 years old
912 - UNEMPLOYED
XXX - Unknown
900 - WAITER
320 - WAREHOUSE EMPLOYEE
5350 - Water Transportation Workers

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4140 - Wholesale and Manufactured Sales Representatives

500 - WORKER OR MASONRY

4750 - Workers in Occupations Related to Extraction

5370 - Workers Related to Moving Materials

5140 - Workers Related to Production, Metal and Plastic

Industry
000 - 000
046 - 046
245 - 245
246 - 246
500 - 500
600 - 600
700 - 700
800 - 800
826 - 826
856 - 856
857 - 857
867 - 867
906 - 906
721 - accommodation
72 - ACCOMMODATION AND FOOD SERVICE (72) Temporary accommodation and food and beverage preparation services
55 - ADMINISTRATION OF BUSINESSES AND COMPANIES (55) Corporate
924 - Administration of environmental quality programs
925 - Administration of housing, urban planning and community development programs
926 - Administration of programs for economic development

Industry
561 - Administrative and support services
560 - ADMINISTRATIVE AND SUPPORT SERVICES, WASTE MANAGEMENT AND DECONTAMINATION (56)
561 - Administrative and support services
560 - ADMINISTRATIVE AND SUPPORT SERVICES, WASTE MANAGEMENT AND DECONTAMINATION (56)
110 - AGRICULTURAL SERVICES (11) Agriculture, animal husbandry and exploitation, forest exploitation, fishing and hunting
11 - AGRICULTURAL SERVICES (11) Agriculture, animal husbandry and exploitation, forestry, fishing and hunting
481 - Air transportation
713 - Amusement, gaming and recreation industries
112 - Animal husbandry and exploitation
710 - ART, ENTERTAINMENT AND RECREATION (71) Cultural and sporting entertainment and other recreational services
71 - ART, ENTERTAINMENT AND RECREATION (71) Cultural and sports entertainment services, and other recreational services
445 - Beverage and grocery stores
312 - Beverages and tobacco products
515 - Broadcast media (except online)
551 - Business and company administration

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550 - BUSINESS AND COMPANY ADMINISTRATION (55) Corporate

521 - Central banking and monetary authorities

325 - Chemicals

237 - Civil and heavy engineering construction

315 - Clothes

448 - Clothing and accessories stores

334 - Computers and electronic equipment

23 - CONSTRUCTION (23) Construction

230 - CONSTRUCTION (23) Construction

236 - Construction of buildings

623 - Convalescence Homes

522 - Credit institutions and related activities

444 - Distributors of construction materials, equipment and accessories for gardening

423 - Durable goods

Industry

611 - Educational services

61 - EDUCATIONAL SERVICES (61) Educational services

610 - EDUCATIONAL SERVICES (61) Educational services

335 - Electrical equipment, fixtures and components

425 - Electronic markets, agents and brokers

443 - Electronic stores and equipment stores

313 - Fabrics manufacturing

111 - farming

52 - FINANCE AND INSURANCE (52) Financial and insurance services

520 - FINANCE AND INSURANCE (52) Financial and insurance services

114 - Fishing, hunting and catching

720 - FOOD ACCOMMODATION AND SERVICE (72) Temporary accommodation and food and beverage preparation services

722 - Food and beverage service locations

311 - Foods

113 - Forest use

484 - Freight transportation by road

525 - Funds, trusts and other financial activities

337 - Furniture and related products

442 - Furniture stores and home accessories stores

447 - Gas stations

452 - General merchandise stores

221 - Generation, transmission and distribution of electrical energy, water and gas supply through pipelines to the final consumer

100 - GOVERNMENT

620 - HEALTH CARE AND SOCIAL ASSISTANCE SERVICES (62) Health and social work services

62 - HEALTH CARE AND SOCIAL HELP SERVICES (62) Health and social assistance services

622 - Hospitals

923 - Human resources management

4 - I never work

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VVV - IN THE HOME

51 - INFORMATION (51) Information in mass media

510 - INFORMATION (51) Information in the mass media

EEE - INSTITUTE OR UNIVERSITY

Industry
524 - Insurance brokers and related activities
518 - Internet service providers, search portals and information processing services
922 - Justice, public order and security services
532 - Leasing services
316 - Leather and related products
333 - Machinery
310 - MANUFACTURE (31-33) Manufacturing industries
31-33 - MANUFACTURING (31-33) Manufacturing industries
483 - Marine transportation
492 - Messenger Service
21 - MINING (21) Mining
210 - MINING (21) Mining
212 - Mining of metallic and non-metallic minerals, except oil and gas
453 - Miscellaneous Item Stores
339 - Miscellaneous manufacturing industries
441 - Motor vehicle and parts dealers
512 - Movie and sound recording
712 - Museums, historical places and similar institutions
928 - National Security and International Affairs
424 - Non-durable goods
327 - Non-metallic mineral based products
324 - Oil and coal products
211 - Oil and gas extraction
300 - ON YOUR OWN
519 - Other information services
81 - OTHER SERVICES (EXCEPT PUBLIC ADMINISTRATION) (81) Other services except government activities
810 - OTHER SERVICES (EXCEPT PUBLIC ADMINISTRATION) (81) Other services except government activities
115 - Other services related to agricultural and forestry activities
621 - Outpatient health care services (eg, medical offices, laboratories, radiology centers)
2 - Own Home
322 - Paper Products
812 - Personal care and laundry services

Industry
486 - Pipeline transportation
331 - Primary metal products
323 - Printing and related activities
200 - PRIVATE COMPANY
711 - Production of artistic, sports and related industries shows
332 - Products made of metal
54 - PROFESSIONAL, SCIENTIFIC AND TECHNICAL SERVICES (54) Professional, scientific and technical services

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540 - PROFESSIONAL, SCIENTIFIC AND TECHNICAL SERVICES (54) Professional, scientific and technical services

920 - PUBLIC ADMINISTRATION (92) Legislative, governmental, law enforcement and international and extraterritorial organizations activities

511 - Publication (except online)

531 - Real estate

530 - REAL ESTATE AND LEASING (53) Real estate and movable and intangible property rental services

53 - REAL ESTATE AND LEASING (53) Real estate and rental services of movable and intangible property

813 - Religious, charitable, civic, professional and related organizations

533 - Rental of non-financeable intangible assets (except those with copyright)

811 - Repair and Maintenance

44-45 - RETAIL TRADE (44-45) Retail trade

440 - RETAIL TRADE (44-45) Retail trade

454 - Retail without premises

326 - Rubber and plastic products

523 - Securities, property contracts and other financial investments and related activities

541 - services professionals, scientists and technicals

624 - Social help

927 - Space Research and Technology

238 - Specialized construction contractors

451 - Sports, entertainment, book and music shops

493 - Storage

493 - Storage

446 - Stores dedicated to the sale of products for personal care and health.

1 - student

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7.1.20. Crosswalk

Occupation Crosswalk		
Code - Spanish Description (Picklist)	**Code - English Description (Picklist)**	**CROSSWALK value - New list (1/1/2015)**
000 - PROFESIONAL O TRABAJO TECNICO	000 - TECHNICAL WORKER	Not Available
075 - MÉDICO	075 - MEDICAL DOCTOR	2910 - Medical Diagnosis and Treatment Professionals
100 - AGRICULTOR	100 - FARMER	4500 - Occupations Related to Agriculture, Fisheries and Forestry
200 - SUPERVISOR(A)	200 - SUPERVISOR	Not Available
300 - CHOFER O CONDUCTOR	300 - DRIVER OR DRIVER	5300 - Occupations Related to Transportation and Material Transfer
315 - CONTRATISTA	315 - CONTRACTOR	Not Available
320 - EMPLEADO GENERAL	320 - GENERAL EMPLOYEE	Not Available
321 - EMPLEADO GENERAL RESTAURANT	321 - GENERAL EMPLOYEE RESTAURANT	3590 - Other Workers Related to Food Preparation and Serving
330 - OPERADOR EQUIPO PESADO	330 - HEAVY EQUIPMENT OPERATOR	5300 - Occupations Related to Transportation and Material Transfer
340 - MECANICO	340 - MECHANICAL	4900 - Occupations Related to Installation, Maintenance and Repair
350 - EMPLEADO DE ALMACEN	350 - WAREHOUSE EMPLOYEE	5190 - Other Occupations Related to Production
360 - OFICINISTA O RECEPCIONISTA	360 - OFFICER OR RECEPTIONIST	4300 - Office and Administrative Support Occupations
375 - PROGRAMADOR O DATA ENTRY	375 - PROGRAMMER OR DATA ENTRY	1500 - Occupations Related to Mathematical and Computer Sciences
380 - RETIRADO O INCAPACITADO	380 - REMOVED OR DISABLED	Not Available
400 - VENDEDOR(A)	400 - SALESWOMAN	4100 - Sales and Related Occupations

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| 500 - OBRERO O ALBAÑIL | 500 - WORKER OR MASONRY | 4720 - Construction Trades Workers |

Occupation Crosswalk		
Code - Spanish Description (Picklist)	Code - English Description (Picklist)	CROSSWALK value - New list (1/1/2015)
700 - AMA DE LLAVES	700 - HOUSEKEEPER	3700 - Cleaning and Maintenance Occupations of Buildings and Green Areas
85 - PROFESIONAL O TRABAJO TECNICO	85 - PROFESSIONAL OR TECHNICAL WORK	Not Available
900 - MESERO (A)	900 - WAITER	3590 - Other Workers Related to Food Preparation and Serving
902 - ABOGADO	902 - ATTORNEY	2310 - Lawyers, Judges and Related Workers
907 - COMERCIANTE	907 - BUSINESSMAN	1310 - Business Operations Specialists
908 - CAJERO(A)	908 - CASHIER	4120 - Retail Sales Workers
909 - GERENTE	909 - MANAGER	1100 - Management Occupations
910 - CONTABLE	910 - ACCOUNTANT	1320 - Financial Specialists
911 - SECRETARIA	911 - SECRETARY	4360 - Secretaries and Administrative Assistants
912 - EJECUTIVO	912 - EXECUTIVE	1110 - Senior Executives
913 - BANQUERO	913 - BANKER	1320 - Financial Specialists
914 - MILITAR	914 - MILITARY	5500 - Specific Occupations of the Armed Forces
915 - DENTISTA	915 - DENTIST	2900 - Professional Occupations and Techniques Related to Health Care
917 - MAESTRA(O)	917 - TEACHER	2500 - Occupations Related to Education, Training and Library Science
918 - PROFESOR(A)	918 - PROFESSOR	2500 - Occupations Related to Education, Training and Library Science
919 - ASISTENTE DE MAESTRO(A)	919 - TEACHER ASSISTANT	2500 - Occupations Related to Education, Training and Library Science

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| 920 - HANDYMAN | 920 - HANDYMAN | 3700 - Cleaning and Maintenance Occupations of Buildings and Green Areas |
| 921 - GUARDIA DE SEGURIDAD | 921 - SECURITY GUARD | 3300 - Occupations Related to Protective Services |

Occupation Crosswalk		
Code - Spanish Description (Picklist)	Code - English Description (Picklist)	CROSSWALK value - New list (1/1/2015)
922 - JARDINERO	922 - GARDENER	3730 - Green Area Maintenance Workers
923 - SERVICIO AL CLIENTE	923 - CUSTOMER SERVICE	4100 - Sales and Related Occupations
924 - TECNICO SOCIOPENAL	924 - SOCIOPENAL TECHNICIAN	3300 - Occupations Related to Protective Services
925 - EMPLEADA DOMESTICA	925 - DOMESTIC EMPLOYEE	3720 - Building Cleaning and Pest Control and Extermination Workers
926 - GUARDIA PENAL	926 - PENAL GUARD	3300 - Occupations Related to Protective Services
927 - ENFERMERA(O)	927 - NURSE	3110 - Nursing, Psychiatry and Home Care Aides
928 - TECNÓLOGO MÉDICO	928 - MEDICAL TECHNOLOGIST	3100 - Support Occupations Related to Health Care
929 - POLICIA	929 - POLICE	3330 - Public Order Workers
930 - BOMBERO	930 - FIREMAN	3320 - Extinction and Fire Prevention Workers
931 - OFICIAL DE CUSTODIA	931 - CUSTODY OFFICER	3300 - Occupations Related to Protective Services
932 - EMPLEADO MANTENIMIENTO	932 - EMPLOYEE MAINTENANCE	3700 - Cleaning and Maintenance Occupations of Buildings and Green Areas
933 - COCINERO O CHEF	933 - COOK OR CHEF	3520 - Cooks and Food Preparation Workers
934 - INGENIERO	934 - ENGINEER	1720 - Engineers
DDD - DESEMPLEADO(A)	DDD - UNEMPLOYED	0000 - Unknown

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EEE - ESTUDIANTE	EEE - STUDENT	0100 - Student
VVV - AMA DE CASA	VVV - Housewife	0101 - Homemaker
XXX - OCUPACION NO REPORTADA	XXX - OCCUPATION NOT REPORTED	0000 - Unknown
100 - GOBIERNO	100 - GOVERNMENT	920 - PUBLIC ADMINISTRATION (92) Legislative, governmental, law enforcement and international and extraterritorial organizations activities
200 - EMPRESA PRIVADA	200 - PRIVATE COMPANY	Not Available
300 - POR SU CUENTA	300 - ON YOUR OWN	Not Available

Occupation Crosswalk		
Code - Spanish Description (Picklist)	**Code - English Description (Picklist)**	**CROSSWALK value - New list (1/1/2015)**
400 - VOLUNTARIO	400 - VOLUNTARY	Not Available
EEE - INSTITUTO Ó UNIVERSIDAD	EEE - INSTITUTE OR UNIVERSITY	003 - Sup School / University
HHH - EN EL HOGAR	HHH - IN THE HOME	002 - Own Home
VVV - NO APLICA	VVV - NO APPLICABLE	005 - Under 14 years old
XXX - DESCONOCIDO	XXX - UNKNOWN	000 – Unknown

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7.2. Attachment B: Puerto Rico Narratives and Requirements

Based on demonstrations provided by the major Vital Records system vendors, attendance at NAPHSIS conferences, and thorough understanding of NAPHSIS use cases and the Model Law, Puerto Rico believes any Vital Records vendor can deliver a Core/base system that supports standard functionality.

In addition to providing the Core/base system, Puerto Rico requires the screen and field order to align with the order of the Puerto Rico certificates and worksheets for each event. The system must support all NCHS and NAPHSIS standards for data edits/validations, including cross-field and cross-page edits. Interfaces such as SSA OVS, EVVE, and FHIR must be available.

Puerto Rico expects the vendor will configure/set up user roles, permissions, and office/facility locations to support the transition of records through Puerto Rico's workflows. Record statuses and flags must be assigned automatically, as appropriate, while the record moves through the workflows. Movement of the record through the workflows must be captured in one location, such as a record history page or audit log, where a user with permission can view all the changes and transitions on the record since it was started.

Puerto Rico encourages all proposers to review the descriptions and work flows carefully to understand the movement of records through the system as these are the minimum requirements for the Core/base system. The Puerto Rico requirements below are organized by event and workflow to provide context. If the proposer does not believe any of the Puerto Rico requirements can be met, the requirement must be copied onto the appropriate tab or sheet within Exhibit E, as an exception. Any requirements that are not on the Attachments as exceptions must be delivered by the proposer.

There are also a series of Bonus requirements. These requirements represent functionality that may exist in some systems and would be ideal but are not required for Puerto Rico's system. The proposer must provide a response to each Bonus requirement in Exhibit E.

7.2.1. Death Process and Requirements

Death records are started only at hospitals, nursing homes, by private physicians, or at the Medical Examiner's office (Forensics). A funeral home may not start a record and can only begin work on the record after medical certification.

Puerto Rico Specific Rules for Starting a Death Record	
D1	If the system finds a record that has already been started in the system but the ownership belongs to another facility or medical certifier, the system will alert the user with a message to call the Central Office if s/he requires access.
D2	The system requires the funeral director, pronouncer, and medical certifier to utilize a PIN or other unique identifier when signing or certifying a record. A checkbox is not sufficient for electronic signatures by these users.
D3	The system requires users to double key specific Jurisdiction identified death fields to ensure the accuracy of the information. If the double keying does not match the user is required to data enter the information again. Requiring double keying must be assignable at the user role level.
Puerto Rico Specific Rules for Facility Starts a Death Record	
D4	The facility queue is sortable by certifier so an administrator may quickly find their records.
Puerto Rico Specific Rules for Forensics Starts a Death Record	
D5	If Forensic starts or takes control of a record, pronouncing information and signature are not required.
D6	The system provides the user with a field to enter the Forensics case number that corresponds to the decedent record.
Rules for Forensics Taking Over a Record	
D7	If Forensics takes control of the medical portion of a record, the system notifies the funeral director, if a funeral director is assigned.

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D8	In cases where the Central Office has forwarded a record to Forensics, the original field entries are maintained in the history but the fields are cleared for Forensics.

Records are started using jurisdictionally defined information. The decedent's social security number (SSN) is one of the pieces of information that may be used to start the record so that OVS can run as soon as possible upon creating the record. The facility or medical certifier is only provided one attempt of sending the SSN through OVS; the remaining attempts are reserved for the funeral home or vital records office.

Puerto Rico Specific Rules for OVS	
D9	The user who creates the record can submit one OVS attempt on the record.

The facility designates the record to a funeral home, pronouncer and medical certifier, or Forensics if the cause of death is not natural. The pronouncer and certifier may be the same person or two different people. The pronouncer and medical certifier complete their portions of the record, VIEWS 2 runs, and the certifier certifies the cause of death (COD) with an electronic signature. Once the record is certified, the facility, morgue attendant, Forensics, or funeral home may generate the transit permit.

Puerto Rico Specific Rules for Assigning Records to Funeral Homes	
D10	If the funeral home is not known, the system sends the record to a funeral home pending queue. The queue is accessible by the facility or medical certifier associated with the record so they can keep track of which records are waiting assignment to a funeral home.
D11	The system does not allow the user to select "other" for a funeral home. The user must select the funeral home from the picklist available within the system.
D12	Unless the COD has been certified, funeral homes are restricted to read-only access to records that have been assigned to them. Once the record is certified by the medical certifier, the demographic fields are now unlocked and available for the funeral home to complete the record.
Puerto Rico Specific Rules for Medical Information, COD, and Medical Certification	
D13	The pronouncer may also be the medical certifier. If the pronouncer is also the medical certifier, then s/he can sign both the pronouncing and cause of death information with one signature.
D14	Facilities and medical certifiers may refer records to Forensics for medical certification without specifying which Pathologist will be the medical certifier. The person referring the case can enter information in a text field to assist Forensics in making a determination as to whether Forensics takes jurisdiction of the case.
D15	Time of death, may be viewed in either military or standard time, but for the purpose of tracking timeliness within the system, it is stored in military time.
D16	If a COD entry matches an entry in the "Rare Causes" table, the system displays a message indicating that the Jurisdiction requests verification of the COD entered.
D17	If the COD is considered a reportable condition, the system sends a notification to the appropriate location/registry. The notification contains the necessary decedent information to automatically update the location/registry. Reportable causes of death may be dependent on the number of occurrences within a specified time period. The causes of death that are reportable using the rapid reporting feature are defined and managed by the Jurisdiction.
D18	The system allows designated users to indicate additional causes of death which are reportable, based on a Jurisdiction-defined number of occurrences within a specified time period.

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D19	If, after registration, the cause of death changes, the system sends a notification to any stakeholder who received notification of the original cause of death through rapid reporting.
D20	All medical certifiers (medical certifiers and Forensics Pathologists) within the same facility may certify records for one another. The system captures the information for the medical certifier who certifies the record.
Puerto Rico Specific Rules for Morgue Attendants	
D21	The morgue attendant may work for one facility or multiple facilities. The morgue attendant user role allows the user to access records from multiple facilities without logging in or out, or changing facilities.
D22	The system provides a queue for records when a body has been sent to the morgue as indicated in the record by the facility user.
D23	The system provides functionality for the morgue attendant to designate a funeral home to the record.
D24	The system provides functionality for the morgue attendant to print Transit Permits.

All nursing home deaths are reviewed by Forensics prior to disposition. The funeral home sends the record to Forensics to decide if they need to investigate; if so, Forensics takes over the record, otherwise Forensics adds an ENV number and returns the record to the funeral home.

Puerto Rico Specific Rules for Deaths at a Nursing Home	
D25	The process for referring a death record for Forensics review because it was a nursing home death is different than the process used by medical certifiers and facilities to refer a record to Forensics. The system is able to accommodate multiple ways to refer records to forensics.
D26	The system provides an area for the funeral home to upload completed documentation to include when sending the record for Forensics review.
D27	Forensics may view the entire death record and supporting documentation for nursing home cases.
D28	The system provides a field for Forensics to enter an ENV number into the record. The ENV number is required before the record can be returned to the funeral home. Once Forensics adds the ENV number, ownership of the record is returned to the funeral home.
D29	When the Forensics takes over the record, ownership transfers to Forensics.
D30	The system generates an updated transit permit for transport to Forensics.

The funeral home completes the demographic information including disposition. If the decedent was embalmed, an embalmer will be responsible for attesting the record with an electronic signature. Cremation requires review and approval by Forensics. If OVS has not passed at the facility the funeral home will have four (4) more attempts to run OVS. The funeral home certifies with an electronic signature and the record is automatically registered with a National File Number.

Puerto Rico Specific Rules for Demographic Data Entry and Edits	
D31	The system allows a funeral home to make changes to fields, such as name, prior to submitting the record to the Central Office for registration. This is important because the funeral home will never start the record but is the owner of the demographic information.
D32	The system provides a manner of indicating that the decedent is homeless/transient. If the "homeless/transient" indicator is selected, the system relaxes edits on the entry of Jurisdiction-defined information.
D33	If the disposition is out of jurisdiction, additional fields are available to capture the state and/or country and final place of disposition.

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D34	"Other" is not an option for disposition.
D35	The system provides the user with a list of cemeteries and crematories to select from for cemetery burials and the ability to type in a cemetery/crematory name if not in list.
D36	The system opens a text box for the user to enter additional information in Jurisdiction-defined fields where "unknown" is selected by a user.
D37	The Jurisdiction is able to define soft edits for interrelated fields such as decedent's name, spouse's name or informant's name to ensure that spelling is the same.
Puerto Rico Specific Rules for Demographic Data Entry and Edits	
D38	The system has a hard edit requiring the informant verification form be uploaded to the electronic record before submission to the Central Office.
D39	The system provides the option for the informant to review and sign the verification form electronically with a hand-held device. Electronically-signed verification forms must be attached to the death record.
Puerto Rico Specific Rules for Embalmers	
D40	The system will capture the name and license number of an embalmer, if the body was embalmed.
D41	If the decedent was embalmed, the embalmer must electronically sign the record.
D42	The system provides the option for the embalmer to review and sign the verification form electronically with a hand-held device.
Puerto Rico Specific Rules for Forensics Acting as Funeral Home	
D43	If there is no funeral home involved in the case and Forensics is acting as such (e.g., in the case of an indigent person), Forensics will complete and sign both the demographic and medical portions of the record and submit it to the Central Office for registration. The funeral director signature is not required.

At the time of submission, the funeral home may order certified copies and disposition permits through the system. Certified copies and disposition permits ordered by the funeral home generate a request in the POS module, and POS calculates the total cost. Disposition permit fees may be paid in person at a local office, online through payment portal *Salud Digital* or payment engine provided by the Department of Treasury of Puerto Rico.

A permit is required for the disposition of human remains. Cremation approval from Forensics is required prior to registration. Disposition permits cannot be requested until the record is registered. Issuance of the permit may be approved after payment has been received.

Puerto Rico Specific Rules for Amending Disposition and Obtaining Permits	
D44	The system does not allow an amendment to disposition more than 10 days after registration.
D45	The system allows for the funeral home to request an amendment to disposition from burial to cremation within 10 days of registration. If the disposition is changed to cremation, the record must be sent to Forensics and follow the standard cremation approval workflow.
D46	The system accommodates a different template for each permit type.
Puerto Rico Specific Rules for Second Disposition	
D47	The system provides functionality to issue disposition permits for registered records even if a cremation permit has previously been issued.
D48	The second disposition is captured for issuance of a permit but does not change the final disposition on a registered record. Second disposition is not an amendment on a death record.

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D49	The system links second disposition to the original death record in a way that a user can move between the original record and the disposition form.
D50	Second Dispositions can only be created by Funeral Directors, Local and Central Office staff.
D51	Requests for second disposition permits created by a funeral home must be reviewed and approved by the Central or a local office.
D52	Permits for disposition can only be issued by users at Local or Central offices

At registration, the funeral home requests a disposition permit and can pay in person at an office, online through payment portal *Salud Digital* or payment engine provided by the Department of Treasury of Puerto Rico. If the cause of death was not certified within three (3) days of the death, an additional fee is levied when the disposition permit is purchased. When the funeral home arrives to obtain the permit, the office user will either confirm payment was completed online or will take payment via stamps. Upon receipt of payment, the permit is approved, and a copy is issued to the funeral home. The funeral home may print additional copies of the permit directly from the record once they have paid the fee.

Puerto Rico Specific Rules for Disposition Permit Purchase	
D53	The system calculates the total cost for the permit.
D54	The system calculates the time between cause of death certification and date of death. If certification occurred more than three (3) days after the death, the record is flagged for late certification. If the record is flagged for late certification, an additional fee is added to the permit cost.
D55	Payment must be receipted in the system before a disposition permit can be issued.
D56	If the disposition date on the record has passed and a permit has not been issued, the permit is flagged "Do Not Issue." Records that have not had a Disposition Permit issues and the disposition date has passed are placed in a work queue.

All cremations must be approved by Forensics. When the final disposition is cremation, the funeral home submits a cremation request to Forensics. The request is reviewed by Forensics to determine if an investigation is necessary.

During review of the record, Forensics has two options:

1. Approve the cremation request; or
2. Reject the cremation request.

When Forensics approves a cremation request, a cremation number is assigned, and the pathologist approves with an electronic signature. Once approved, the funeral home can continue with completing the death record and requesting the disposition permit.

Puerto Rico Specific Rules for Cremation	
D57	Disposition approval is required by the Forensics office when method of disposition is cremation. Only select staff within Forensics office may approve or reject cremation.
D58	Once Forensics approves a cremation request for a Forensics record, Forensics user has the ability to print a cremation permit immediately. Forensics does not pay for cremation permits.
D59	Once a cremation request has been rejected, the system requires Forensics to electronically sign the rejection. The system requires that Forensics selects a reason from a pre-defined list that includes "other" when s/he chooses not to approve cremation. If the reason is "other", the system requires Forensics to enter notes in an explanation text field if "other" was selected before rejecting cremation.

When Forensics is not satisfied with the cause of death or believes an investigation is warranted, the request for cremation will be rejected. If an investigation is necessary,

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Forensics can take over the record. If the cause of death is insufficient but there is no need for an investigation, Forensics will provide the reason for rejection in the system. The medical certifier and funeral home are notified, and the record must be updated by the medical certifier. Once the medical certifier addresses the cause of death based on Forensics' feedback, the funeral home can request cremation approval again.

Puerto Rico Specific Rules for Disposition of Remains from OOJ	
D60	The system provides functionality to issue a disposition permit for remains brought to Puerto Rico from another jurisdiction. The disposition permit for remains from OOJ are handled through the point of sale module and linked to the appropriate death record, if available.
D61	When the OOJ disposition request is started, the system searches for an existing PR death record and an existing OOS death record that was imported from STEVE. If an OOJ death record is found in the database, the system provides a way for the user to link the OOJ disposition request to the OOJ record.
D62	The fields to capture disposition from OOJ are jurisdiction-defined and configurable. The screens include a field for the Central Office user to indicate if the remains coming into Puerto Rico are ashes, or a body.
D63	An out of jurisdiction trade call is automatically indicated on disposition from OOJ registrations. The trade call funeral home will always be from outside Puerto Rico. Selection options for Puerto Rico funeral homes are disabled. Place of death will always be outside Puerto Rico. Selection options for Puerto Rico death locations are disabled.
D64	The remains from OOJ record can be updated with a Second Disposition after Cremation. If the remains will be cremated within PR, the cremation process does not require approval from Forensics.
D65	The system provides a way for the Central Office user to upload all documentation related to the disposition from OOJ.

7.2.2.Forensics – John Doe (Death)

When John Doe remains are left unclaimed by next of kin, they can be donated or cremated. The Donations Board examines the body and decides if the remains are acceptable for use. When the Donations Board accepts the remains, they are added to the death record as the funeral home and place of disposition; a transit permit can be generated.

If the Donations Board declines the remains, Forensics will cremate the body. Forensics must approve the cremation through the standard process. Forensics does not pay for cremation permits. Once the body is taken by the Donations Board or released for cremation, the record is registered.

Puerto Rico Specific Rules for Forensics John Doe Records	
D66	The system provides a way for the Forensics user to start the record if the name of the decedent is not known. The system provides an automated way of populating the name field with "unknown" and accounts for and distinguishes between the multiple "unknowns" that may occur at one time.
D67	The system allows an authorized user to change the name from "Unknown" to a proper name up until the time the record becomes certified.
D68	When the identity of the decedent is unknown, the system prompts the user to add the Donations Board to the record. Once the Donations Board is added onto the record, the Donations Board has access to the death record and acts as the Funeral Home.

7.2.3.Drop to Paper (Death)

Due to severe weather conditions or utility disruptions, such as power outages, internet access, or other utility issues, users may face unavailability of essential services at locations

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where records are entered into the EVRS system. To address these challenges, the Jurisdiction requires a drop to paper process (a paper-based process) which allows a record to be initiated in the EVRS and finalized on paper.

The medical facility staff or certifier start a record in the EVRS and prints a medical abstract. The funeral home takes the medical abstract when picking up the body. The funeral home uses the informant worksheet to collect all demographic information. The funeral home brings the medical abstract and informant worksheet to a local office for registration.

The local office takes the forms, locates the EVRS record started by the medical facility staff or certifier, and data enters the demographic information. When entering demographic information, demographic edits are relaxed. Once data entry is complete, the record is submitted to the Central Office for review and approval. Following approval, the record is registered electronically and assigned a NFN.

Puerto Rico Specific Rules for Drop to Paper	
D69	The system provides the functionality for drop to paper records started by a facility or medical certifier.
D70	Death records that are partially electronic may be data entered by a local office. The local office user must take an actionable step to mark the data entry of a drop to paper record as validated.
D71	When a local office has data entered a drop-to-paper record the system prompts the user to upload the completed informant worksheet. Local offices are required to upload the completed informant worksheet to the record.
D72	The system automatically queues validated drop to paper records for Central Office review. Registration staff at the Central Office review all drop to paper records prior to registration.
D73	During Central Office review, demographic fields may be corrected if there is a discrepancy between the electronic record and informant worksheet, but the medical fields are locked as the medical information has already been completed and signed by the medical certifier.
D74	The user is required to take an actionable step approving the drop to paper record. Upon approval, the system assigns the record the next sequential NFN for the event year.

7.2.4. Death Bonus Business Rules

Bonus rules pertaining to Death are those that the EVRS vendor may provide to Puerto Rico. Vendors must provide a response to each rule in **the workbook Exhibit E.1 (spreadsheet titled Death)**.

7.2.5. Fetal Death Process and Requirements

A fetal death is the delivery of a fetus 350 grams or more (or if weight is unknown, then after 20 weeks of gestation based upon date of last menses) with no sign of life when entirely outside the mother's body due to a spontaneous intrauterine death of a fetus. Fetal deaths are usually started at a facility and if Forensics is not involved, the medical certifier completes the medical portion, and the funeral home completes the demographic portion.

Puerto Rico Specific Rules for Starting a Fetal Death Record	
FD1	The system requires users to double key specific Jurisdiction identified fetal death fields to ensure the accuracy of the information. If the double keying does not match the user is required to enter the data again. Requiring double keying must be assignable at the user role level.
FD2	When a fetal death occurs in a moving conveyance, the place of death is reported as where the fetal death was first removed from the conveyance.
FD3	The system requires the user to select a funeral home from a list. "Other" is not an option.

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FD4	The system requires a Medical Certifier be designated on the record. The medical certifier is responsible for completing the medical information and cause of death, then certifying to the accuracy of the cause of death.

If there is concern about the cause of death, Forensics is contacted to decide if an investigation is needed and, if so, Forensics creates and completes the medical portion of the record in the system. Forensics may elect to complete the entire record, including demographic information, and submit the record for registration. If no investigation is required Forensics rejects the record back to the facility. Forensics is responsible for completing the fetal death record for any events occurring outside a facility.

Puerto Rico Specific Rules for Forensics Starts a Fetal Death Record	
FD5	If the fetal death occurred outside of a facility (i.e., a home delivery) Forensics is responsible for completing the fetal death record.
FD6	Only Forensics can register a fetal death record with a pending cause of death. When the cause of death is pending at registration, Forensics must file an amendment to add the cause of death information post-registration.

The funeral home is responsible for demographic information and disposition. Hospital disposition is not allowed in Puerto Rico. If cremation is requested, cremation approval must be obtained through Forensics following the same procedure as death records.

Puerto Rico Specific Rules for Demographic Data Entry and Edits	
FD7	Once the record is certified by the medical certifier or Forensics, the demographic fields are now unlocked and available for the funeral home to complete the record. Prior to medical certification, the funeral home can only view the record.
FD8	Hospital disposition is not an option.
FD9	Before the record can be registered, the system requires the user to upload the completed fetal death worksheet to the fetal death record.
Puerto Rico Specific Rules for Fetal Death Registration	
FD10	Reports of fetal death are completed within a Jurisdiction defined timeframe after the fetus was delivered or else goes to the late queue.
FD11	The system provides a queue for Fetal Death records with Jurisdiction defined soft edits.

7.2.6. Data Extracts Narrative and Business Rules

Standardized data extracts are required for birth, death, and fetal death modules to report data to the CDC and other partners. Data extracts can be processed in two formats. The current standard method uses the IJE format with files sent via STEVE to NCHS and other business partners. The future standard method is using FHIR messaging. Once the Jurisdiction is certified by NCHS to use FHIR messaging, records will be sent as FHIR messages to NCHS and other jurisdictions via STEVE. After a record has been exported in the IJE layout or sent via FHIR message, it is flagged as such.

Puerto Rico Specific Rules for Data Extract Formats	
DE1	Standard data extract formats, such as the IJE layout, can be modified by a user as NCHS changes the format.
DE2	The data extract contains both standard certificate information and Jurisdiction specific information in the same file. The position/location of Jurisdiction specific fields is Jurisdiction defined.
Puerto Rico Specific Rules for Flagging Records and Generating Extracts	
DE3	The flag for a specific batch of records can be reset so that the file can be included in the next extract file or FHIR transmission.

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DE4	The flag for a specific record can be reset so that the record can be included in the next extract file or FHIR transmission.
DE5	The system allows a user to generate extract files on demand based on Jurisdiction-define criteria.
DE6	When new codes are received on a record, the system needs to reflag the record to send to STEVE for everyone except NCHS.

When NCHS is the recipient of the IJE files or FHIR messages, the data will be processed. Coded race and ethnicity, as well as causes of death when appropriate, are uploaded to STEVE if the data was received via IJE file. The files are pulled from STEVE and imported into the EVRS. Imported codes are linked with the appropriate records in the EVRS. If the data was sent to NCHS by FHIR message, the codes will be returned to the Jurisdiction via FHIR message and data is automatically linked with the record in the EVRS. The coded data is viewable to select users when the record is opened in the application.

Puerto Rico Specific Rules for FHIR	
DE7	The system supports sending a record in both IJE and FHIR message at the same time, or a Jurisdiction user can switch between the IJE and FHIR message.
DE8	The system is, or will be, capable of sending FHIR messages to the STEVE API for distribution to NCHS and jurisdictional partners.
DE9	The system is, or will be, capable of receiving acknowledgement messages from NCHS in response to FHIR messages sent by the EVRS.
DE10	Acknowledgement and other transmission-related messages received by the EVRS are placed within the application in a way that a trained jurisdictional staff member can determine if there is an issue with FHIR messaging that needs to be escalated to the vendor.
DE11	The system provides the ability for the Jurisdiction to switch between recipient API endpoints.
Puerto Rico Specific Rules for Linking Coded Data	
DE12	Coding received by the system via FHIR messages are automatically linked to the record.
DE13	All codes returned from NCHS are viewable to the user, as defined by user role permissions.
DE14	The system supports import of the monthly YTD TRX update files.

When a jurisdictional business partner is the recipient of the data, IJE files will be sent via STEVE or other secure means.

All FHIR standards such as implementation guides and libraries are not yet finalized. All FHIR messaging functionality must align with the standards set by NCHS. As the standards are finalized, the EVRS must be adjusted to meet the final standards.

7.2.7. Data Extract Bonus Business Rules

Bonus rules pertaining to Data Extract are those that the EVRS vendor may provide to Puerto Rico. Vendors must provide a response to each rule in the **workbook Exhibit E.1 (spreadsheet titled Data Extract)**.

7.2.8. Birth Process and Requirements

Most births occur at a medical facility and the staff creates records with minimum information. The attendant/OBGYN and the pediatrician are responsible for the mother's medical and delivery information, and the infant's information, respectively. The attendant/OBGYN and pediatrician electronically sign their respective sections of the record.

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Puerto Rico Specific Rules for Starting a Birth Record	
B1	The system requires users to double key specific Jurisdiction identified birth fields to ensure the accuracy of the information. If the double keying does not match the user is required to enter the data again. Requiring double keying must be assignable at the user role level.
B2	The system opens a text box for the user to enter additional information in Jurisdiction-defined fields where "unknown" is selected by a user.
B3	The system provides an option to indicate that the mother refused to provide information for any given field.
Puerto Rico Specific Rules for Special Characters/Diacritical Marks	
B4	Fields for given names cannot contain symbols that have no phonetic standing on their own other than numerals used for generational identifiers or common punctuation such as hyphens or hyphenated names, apostrophes used as part of a given name or surname, commas to separate surnames from generational identifiers, and periods in generational identifiers or when an initial or abbreviation is used as part of a name.
B5	The system permits the entry of diacritical marks on the birth record and the printing of those on the birth certificate.
B6	The system will remove diacritical marks when transmitting names to SSA.
Puerto Rico Specific Rules for Social Security Number of Baby	
B7	The system may print a statement for the parents to confirm that the baby's information has been sent to SSA for assignment of a SSN.

Births that occur at a medical facility are started at the facility with minimum demographic information. If the birth is a plural birth, the system has the ability to clone the first baby record for each baby. Plural births are linked in the system.

Puerto Rico Specific Rules for Plural Delivery	
B8	The system allows user to change type of plurality (live birth/ fetal death).
B9	The system automatically links the individual records in a plural delivery and a system generated linkage number is applied to all the records of a plural delivery.
B10	The system includes a mechanism to alert users that they have additional birth records that may still be due for registration. Message is issued if user utilizes the plurality functions.
B11	The system flags unlinked plural deliveries so that they may later be linked by the Central Office.

Information is entered on the record from worksheets. The Jurisdiction allows a user at a hospital to enter information for special circumstances such as surrogate delivery and Voluntary Acknowledgement of Parentage. In case of a surrogate delivery, the birth mother's information will be captured separately from the intentional parents' information.

Puerto Rico Specific Rules for Surrogacy	
B12	The system provides a surrogacy indicator. If selected, additional pages are available to capture the information of the intentional parent (e.g., legal mother).
B13	If the surrogacy indicator is selected, the system requires the user to attach the sworn statement of the intentional parents and surrogacy contract to the record prior to submission for registration.
B14	When a facility user logs on, the system will provide a message (preferably a pop up message) indicating that there are records that are over five (5) days old.

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B15	The system has fields to capture the gender and sex of both intentional parents. The system pre-populates the gender field based on the response selected for sex, but the gender field remains enabled and can be changed to be different than sex.
B16	If the intentional parents are married at the time of the birth or complete Voluntary Acknowledgement of Parentage, both parents can be added to the record regardless of parent sex or gender.
B17	Proof of the intentional parents' marriage is required to be uploaded to the record before submission for registration if both intentional parents are to be listed on the record and a Voluntary Acknowledgement will not be completed.

The birth attendant and child's pediatrician are responsible for completing their respective sections of the birth record and certifying. Upon certification, the corresponding section of the record becomes locked to editing unless that certifier uncertifies.

Puerto Rico Specific Rules for Birth Certification	
B18	The system requires the user to assign a medical certifier to electronically sign the birth record prior to registration. Once assigned, the record is queued for the medical certifier.
B19	In addition to the medical certifier (pediatrician), an Attendant/OBGYN must also electronically certify the record prior to submitting the record to the Central Office for registration. The fields which the Attendant/OBGYN are responsible for are jurisdiction defined.
B20	Both the medical certifier (pediatrician) and Attendant/OBGYN must electronically sign the record utilizing a unique identifier such as a PIN. A checkbox is not sufficient for certification.
B21	Medical fields are locked once certified by the appropriate medical certifier (pediatrician) and Attendant/OBGYN.

A verification form is available for the parent(s) to review. The parent(s) are required to sign the verification form and the form must accompany the record for registration. Signatures may be collected on printed forms or on a hand-held device. All records are queued for review at the Central Office prior to registration. Once a record is validated, it is registered with a National File Number.

Puerto Rico Specific Rules for Worksheets and Verification Forms	
B22	The system requires the worksheet(s) to be printed and a signed copy uploaded to the birth record prior to the record being submitted for registration. A user must provide a positive indication that the verification form was signed by at least one parent.
B23	The system allows the parents to sign all verification forms electronically using a Topaz signature pad or another mobile device. The electronic verification form provides two signature locations with labels populated based on the requested parent type (mother/mother, mother/father, etc.). The system automatically captures the date and time of each signature when signed electronically.

Once the information is correct and signed, the record is submitted for registration. If the birth occurred more than thirty (30) days prior to submission of the record, the record cannot be registered until a late fee is paid.

Puerto Rico Specific Rules for Late Birth Registrations	
B24	The system does not allow a facility to enter a birth record for an infant over 30 days old.
B25	If a facility attempts to start a birth record for an infant after 30 days from the date of birth, the system alerts the user that the birth is late and must be filed with a local office and prevents the user from starting the record.

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7.2.9.Safe Haven / Foundling Birth

Safe haven and foundling infants are registered following the standard process for births at a facility. Both safe haven and foundling infants are taken into custody by Family Services. Family Services will obtain a court order for guardianship and is required to present the court order to the medical facility for registration of the infant. Given that the delivery situation and attendant are unknown in these cases, a signature is not required from the attendant/OBGYN. However, the pediatrician who examines the child is required to sign the birth record attesting to the child's medical information.

Once filed, safe haven and foundling records are flagged with a "Do Not Issue" flag.

Puerto Rico Specific Rules for Safe Haven and Foundling Records	
B26	The birth facility user has the ability to start a birth record for a foundling or safe haven infant. Foundling and Safe Haven records are able to be uniquely identified.
B27	If the record is a Foundling case, medical certification is not required from the Attendant/OBGYN.
B28	Unknown responses do not require the user to enter comments into the record.
B29	The system provides unique fields to capture the name and address of the person or institution where the child is placed for care.
B30	The system allows the user to enter the address where the child was found (i.e., 102 Main Street) or turned in.
B31	The Family Services representative acts as the Informant and signs the Verification form.
B32	The system requires a court order to be attached to the record prior to registration.
B33	The system provides the ability to capture information regarding supporting documentation.
B34	Safe Haven/Foundling records are flagged "Do Not Issue" when submitted to the Central Office for registration.
B35	The system must allow the Central office to seal a foundling or safe haven infant record if the infant is identified and a birth record is found to already exist.
B36	Only Jurisdictionally defined fields from the mother's demographic information will be extracted for statistical reporting.

7.2.10. Voluntary Acknowledgement of Parentage

Puerto Rico performs Voluntary Acknowledgement of Parentage rather than paternity acknowledgement. The process is like paternity acknowledgement but without gender limitation.   The birth mother or intentional parent may complete the voluntary acknowledgement form at the time of the birth, or it may be submitted later through an amendment process. The goal is to acknowledge parentage in the form that best suits the parents. Parents may be mother / father, mother / mother, father / father, or parent 1 / parent 2.

Voluntary Acknowledgement prior to registration must be completed at the facility. This requires the parent(s) signatures to be witnessed by an authorized individual. Authorized staff from local offices will be placed at medical facilities to support birth registration.

Puerto Rico Specific Rules for Voluntary Acknowledgement of Parentage	
B37	Regardless of the mother's marital status the system will prompt the user to indicate if the mother wishes to complete a Voluntary Acknowledgement of Parentage.
B38	The system requires the user to take an actionable step of indicating yes or no regarding completion of the Voluntary Acknowledgement of Parentage.

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B39	Parent title options are jurisdictionally defined. The parent title option chosen will show in the record and on any forms or certificates when printed.
B40	The system tracks the number of times the form is printed.
B41	When parents sign the form, the system provides the user with a way to indicate receipt of the parent's signatures in the system and fields to capture the date and time the form was signed by each parent.
B42	The system allows the parents and local authorized personnel to sign all forms required for Voluntary Acknowledgement of Parentage, including any minor forms, electronically using a Topaz signature pad or another mobile device. The system automatically captures the date and time of each signature when signed electronically.
Puerto Rico Specific Rules for Minor Parent	
B43	If either parent is a minor (younger than 21) at the time of the birth and the parents want to complete a Voluntary Acknowledgement of Parentage, the record is flagged as Minor Parent.
B44	Records flagged for minor parents are queued for a supervisor to review prior to registration. The supervisor will be responsible for working with the minor parents to obtain required documentation to establish parentage for the child.

7.2.11. Home Birth

Home birth packets are obtained from the Central Office through the Point-of-Sale module. After birth, the completed packet is returned to the Central Office. If documentation is incomplete, the request is saved for the parent(s) to return and complete the registration. The home birth request is updated with the necessary documentation and a record created. In the case of an unattended home birth, the mother may act as the Certifier and Attendant. A verification form is printed and provided to the parents for review and signature. Once the information is correct, the record can be registered.

Puerto Rico Specific Rules for Home Births	
B45	The birth record is flagged as an unattended home birth in the birth record and captures if the unattended birth was intended or not intended, but no indicator is printed on the face of the certificate.
B46	An indicator is selected if mother was the only attendant to the birth. The indicator indicates that the mother is attesting to attending the birth. When the "Mother as Certifier" indicator is selected, the mother's information is copied to the Attendant fields.
B47	For an unattended home birth, the Pediatrician's name and license are optional, and the OBGYN/Attendant and Pediatrician certifications are not required.
B48	If the birth is marked with the "Unattended Home Birth" indicator, the system requires the user to attach a Sworn Statement to the record before it can be registered.
B49	The system requires the user to print out and upload a signed copy of the home birth verification form before the record can be registered.

If the birth occurred more than thirty (30) days prior to submission of the home birth packet, a late fee is added onto the registration fee in the POS module.

Puerto Rico Specific Rules for Late Home Birth Registration	
B50	The system supports integration between the birth and POS modules to account for fees that are required for registration to be completed. The system calculates the time between birth and record completion (not registration). Completed means that all fields and edits are complete and validated and the record is in the review queue for review prior to registration.

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B51	If the birth was more than thirty (30) days before the record is completed (not registered) in the system, the system adds the late fee to the POS transaction. If all registration fees, including late fees, are not receipted in the POS transaction, the system prevents the record from being registered.

If the birth occurs in transit to a medical facility and the mother and baby were removed from the conveyance before arriving at the hospital, the birth is registered like a home birth.

7.2.12. Birth Bonus Business Rules

Bonus rules pertaining to Birth are those that the EVRS vendor may provide to Puerto Rico. Vendors must provide a response to each rule in the **workbook Exhibit E.1 (spreadsheet titled Birth)**.

7.2.13. Delayed Birth Process and Requirements

Central Office registration receives a delayed birth request and enters applicant information in the Point-of-Sale module and uploads the application and the evidentiary documents to the request. Two types of services are charged to the customer: a search fee (negative certificate) and a delayed registration fee. Upon review of the application and evidentiary documents, if eligible, the registration unit will create the delayed birth record in the Delayed Birth Module. There is workflow between the POS and Delayed Birth Modules.

Puerto Rico Specific Rules for Starting a Delayed Birth Record	
DB1	Delayed birth fees are split between the cost for a search and the cost for registration. The search fee includes issuance of a Negative Certificate and is paid prior to creating a record in the Delayed Birth module. A Negative Certificate is issued for all delayed birth requests. It is evidence that the Demographic Registry performed an appropriate search and was unable to locate a registered birth record prior to establishing a delayed birth record.
DB2	The system associates a receipt number from the point-of-sale module with the delayed birth.
DB3	When a new delayed birth certificate record is created, the system checks for an existing birth, death, or fetal death record, as well as any closed or denied delayed birth requests.
DB4	The system prevents delayed birth registration for a deceased individual without confirmation that a court order was received.
DB5	The system supports the Voluntary Acknowledgement of Parentage workflow for delayed birth registrations.

The certificate provides an abstract section for documenting the evidentiary information. The verification form is printed and sent to the parents for signature. The electronic record is placed in a pending queue. Upon receipt of the signed verification form the document is uploaded to the electronic record. The record is released for registration and a National File Number is assigned to the record. A certificate may be issued at that time.

Puerto Rico Specific Rules for Abstracting Evidence and Supporting Documentation	
DB6	The system checks the age of the person applying for a delayed birth record as age determines eligibility requirements, the type of evidence that must be submitted, and fields collected on the record. If the registrant is ten (10) years old or younger, the delayed birth screens match the facility birth screens. Delayed birth certificates for registrants more than ten (10) years of age do not require medical information.
DB7	The user selects, from a Jurisdictionally defined list, the type of proof that was submitted and must complete a select set of fields capturing details about the documentation used as evidence for registration. Multiple

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	document selections are possible. The system requires the user to upload all documentation used to validate the birth facts prior to registration.
DB8	The system requires upload of a signed Verification form prior to registration of the delayed birth. Records that are ready for registration but awaiting a signed Verification form are available to be tracked in a queue or list of records.
Puerto Rico Specific Rules for Court Orders	
DB9	If an applicant is unable to submit acceptable documentation to establish the facts of birth, the system provides a way for the Jurisdiction to indicate a court order is required and a flag may be placed on the record.
DB10	If the application requires a court order, the system prevents a user from selecting any evidentiary documents other than a court order from the dropdown list.
Puerto Rico Specific Rules for Delayed Birth Data and Extracts	
DB11	Delayed birth records are sent to NCHS in the IJE until the year of event is closed out by the Jurisdiction.

If the application for the delayed birth record is denied, the system allows the user to print a letter of denial and indicate the reason for the denial. The request is closed in POS. Closed requests can be reopened at a later date. The denial letter and any documentation provided by the requestor are returned to the requestor by mail.

Puerto Rico Specific Rules for Denied Requests and Closure	
DB12	The system provides the ability to deny a request for a delayed birth record, and for the user to close the denied request. The system prompts the user to upload any documents received from the applicant before a denied request can be closed.
DB13	A delayed birth request that is denied is retained in system with a status of "denied" and a message that the request can only be opened with appropriate documentation.
DB14	The system requires the user select a reason from the Jurisdiction defined list of reasons why the request was denied registration.
DB15	The system allows an authorized user to re-open a closed request and continue processing.
DB16	The system automatically changes the request status to "closed" after Jurisdiction defined timeframe.

7.2.14. Delayed Birth Bonus Business Rules

Bonus rules pertaining to Delayed Birth are those that the EVRS vendor may provide to Puerto Rico. Vendors must provide a response to each rule in **the workbook Exhibit E.1 (spreadsheet titled Delayed Birth)**.

7.2.15. Amendments Process and Requirements

If an error is discovered on a registered record, the record must be amended with the correct information. There are several ways an amendment can occur. All amendments require supporting documentation or a court order.

1. The customer may go to the Central Office or a local office and request an amendment.
2. The customer may send in the request or court order to the Central Office.
3. An EVRS user (birth certifier, medical certifier, Forensics, or funeral home) may initiate the change through the system (this process is described in the next section).

7.2.16. EVRS User Creates and Amendment

System end users (i.e., funeral director) may initiate amendments. System end users initiate amendment requests directly from the event record up to thirty (30) days after the record

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was registered. The user can see the current record values in a read-only format and enter the requested change.

Puerto Rico Specific Rules for Amendments Started by End Users	
AC1	All end users may request amendments through the system for their records within 30 days after the record is registered.
AC2	Field and cross-field edits during an amendment, including incorporation of VIEWS 2, are consistent with the entry of a new record. The system displays the results of the edit checks for the user.
AC3	The system requires the user to confirm that s/he is finished with the request and that the information provided is correct. Prompt could be an action such as selecting a check box. This action makes the user responsible for confirming that the request is valid. A user with permission must electronically sign the request. Once the request has a completed confirmation and electronic signature, all edit checks pass, and all required attachments are uploaded, the request is submitted to the Central Office for review.
AC4	The system allows an authorized user to cancel an amendment request that has not been submitted to the Central Office.
Puerto Rico Specific Rules for Birth Amendments	
AC5	The pediatrician and Attendant/OBGYN have distinct medical amendments that allow them to modify the fields they completed.

For death: Funeral directors may change another funeral director's records as long as they are part of the same funeral home or group. If one funeral home is bought by another, the new funeral home may assume responsibility for the records owned by the old funeral home, but this is not a guarantee. If records are transferred to the new funeral home, they will have the responsibility of changing/amending any of the old records and any record after the sale will be changed to reflect the new funeral home's information.

Puerto Rico Specific Rules for Death Amendments	
AC6	Amendments created by Forensics to update a pending cause and/or manner of death are automatically registered upon completion by the authorized user. Approval by the Central Office is not required.
AC7	There is no limit to the number of times Forensics can update death record information.
AC8	Forensics can only amend Forensics records. Authorized Central Office users can grant Forensics access to amend a registered record that was not registered by Forensics.

7.2.17. Amend a Registered Record

Customers can mail or request an amendment at a local office counter or the Central Office. Amendments require evidentiary documentation dependent on the fields being amended, or a court order. If the amendment cannot be processed, the customer is notified and has the opportunity to submit additional documentation or a court order.

Puerto Rico Specific Rules for Amendments	
AC9	Once an amendment is started in the system it is flagged with a "do not issue" flag until such time that the amendment is complete. Completion includes approved, rejected without the option to be resubmitted, or abandoned.
AC10	The system allows any data field on a record to be amended except the registration date and NFN.

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AC11	If certified copies were issued prior to the amendment, the system generates a letter to the requestor recalling the copies.
Puerto Rico Specific Rules for Amendment Fees	
AC12	There are fees associated with each type of amendment, except amendments made by Forensics.
Puerto Rico Specific Rules for Limiting Amendments	
AC13	If a particular item on a registered record has been changed once, no further changes can be made without a court order. When a second amendment is initiated on the same data element in a record, the system provides an alert that the amendment cannot be processed without a court order. The system requires the user capture the court order information for the subsequent amendments to a data field to continue with the amendment.
AC14	A court order or adoption may be filed after an amendment has been completed on the record without firing the "one amendment per data element" edit.
AC15	A designated Central Office user may override the restriction on a second amendment without a court order.

Requests received at a Demographic Registry location are started in the POS module; certified copies may be ordered at the same time. Fees for amendments are receipted on the POS request. The user can see the current record values in a read-only format and enter the requested change. The request is submitted for review and approval by the Central Office. Requests initiated at the Central Office are processed directly by the amendment unit.

Puerto Rico Specific Rules for Amendments Started at a Local Office	
AC16	Amendment requests started at a local office are initiated within the point-of-sale module for receipting and transaction management. Local office users can initiate an amendment on any record upon receipt of appropriate payment and supporting documentation from an eligible customer. The system does not allow a user at the Local office to complete an amendment.
Puerto Rico Specific Rules for Processing End User Amendments	
AC17	The system requires the Central Office to mark the amendment as "approved" or "rejected." The system will send a message to the system user once the amendment is completed, informing the user of the approval or rejection.
Puerto Rico Specific Rules for Gender Change Amendments	
AC18	During a gender change amendment, only the gender field can be changed on the record.
AC19	The system allows the gender to be different than sex on a birth record.
Puerto Rico Specific Rules for Legitimations and Adoptions Amendments	
AC20	The system allows same-sex parents on an adoption record and provides ability to include both names on birth certificate (for example, Father/Father, Mother/Mother).
Puerto Rico Specific Rules for Voluntary Acknowledgement of Parentage	
AC21	Voluntary Acknowledgement can be established through the voluntary acknowledgement of parentage form, an ASUME court order, or a standard court order. The system requires the user complete fields that correspond to the method for establishing parentage and uploads required documentation to the amendment before the amendment can be processed.

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Puerto Rico Specific Rules for Voluntary Acknowledgement Rescission	
AC22	The system allows role defined users to mark a record as a having a "Parentage Rescission." Rescission can occur within 60 days of completion with a sworn statement or notarized affidavit. After 60 days, rescission requires a court order. The system requires appropriate documentation be uploaded to the amendment based on the evidence used to process the rescission.
AC23	The system allows for court-ordered rescission of parentage and retains the court order number with the Voluntary Acknowledgement Form and birth record.
AC24	The system does not allow a Central Office user to change a record after a rescission without a new VAP or court order.
Puerto Rico Specific Rules for Reinstatements	
AC25	If a request for reinstatement is processed, the amendment is reversed in the system so the record reflects the values that existed prior to the amendment. Reinstatement requires a court order (except for VAP within 60 days). If the original record was sealed, the original record becomes the current record and the second (newer) record is sealed.
Puerto Rico Specific Rules for Rejection and Correction Cycle	
AC26	The system allows the Central Office to reject an amendment request and notify the submitting user that the requested amendment cannot be processed (ex. court order required). In this case, the rejected amendment is not queued for the submitting user.
AC27	The system allows a user to reject an amendment request back to a requestor for correction/additional information. In this case, the process for returning the record reactivates the editing feature for the record owner.
AC28	The user may select as many reasons as necessary for rejection of an amendment. Reasons may include legal impediment or missing documentation. All reasons for rejection are included in a letter or email provided to the person who submitted the amendment.
Puerto Rico Specific Rules for Abandoned Amendment Requests	
AC29	If the Central Office determines that an amendment request will not be completed, the request can be marked as abandoned by the user and the amendment would leave the queue. The system maintains abandoned requests in the system with an inactive system. Abandoned requested may be retrieved and processed by authorized users. If an amendment request is abandoned, the "Do Not Issue" flag is removed from the record.
AC30	The system abandons a request after a Jurisdiction defined period of time and the request may be retrieved.

After an amendment is completed, the record is queued for the vault to print an amendment report, the requestor (customer or end user) is notified of amendment completion, and the request is queued for issuance.

Puerto Rico Specific Rules for Footnotes	
AC31	A designated Central office user may override the system's ability to print "Amended" on a certificate.
AC32	The system prints a footnote that includes the amended item and the date amended. Any other information should not print on the certificate. The format of the footnote is defined by the Jurisdiction. The system does not print footnotes on select amendments (ex. Adoption, voluntary acknowledgement of parentage).

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AC33	The system allows authorized users to choose from a Jurisdiction defined list what is printed when medical information, including COD, is amended.

For legacy records originally filed on paper, records may not require back data entry prior to a user creating an amendment.

Puerto Rico Specific Rules for Legacy Records	
AC34	The system prompts the user to send a record for back data entry if the record is incomplete when s/he attempts to create an amendment. Records need to be complete in the system prior to an amendment being created so that all fields are available for the amendment. Once the record is backfilled during back data entry, it is returned to an appropriate queue for a user to enter the amendment information.

7.2.18. Amendments Bonus Business Rules

Bonus rules pertaining to Amendments are those that the EVRS vendor may provide to Puerto Rico. Vendors must provide a response to each rule in **the workbook Exhibit E.1 (spreadsheet titled Amendments)**.

7.2.19. Point of Sale Process and Requirements

Stamps Definition: In-person payment for services must be with stamps. Stamps are an alternative to cash payment and have a defined value (i.e., $5, $10). Unlike cash, change cannot be made for overpayment. Each stamp has a unique number, similar to money orders. When services are paid in stamps, each unique stamp number must be captured on the request. Cash is not accepted as a form of payment. In the requirements, the term cash means stamps.

The Demographic Registry offers a variety of services to the public including issuance of certificates, genealogy research, non-certified copies of records, and record registration and amendments.

Service requests may be initiated in several ways:

1. Through a walk-in request by a customer at the Central or a local office counter;
2. Through a mail request by a customer;
3. Through the Vital Records system by a user; or,
4. Through phone* or internet order website by a customer (VitalChek, Salud Digital).

*Orders are only accepted by phone at the VitalChek central processing office. Phone call orders are not accepted through the Demographic Registry in Puerto Rico.

Puerto Rico Specific Rules for Orders	
ISS1	The system assigns a Jurisdiction-defined unique system-generated sequential number to each request based on the type of request. Numbering resets at the beginning of each year.
ISS2	Request fields may differ based on request type and services purchased. The fields are Jurisdiction defined.
Puerto Rico Specific Rules for Payments	
ISS3	Fees are managed and can be configured in the system by a Jurisdiction user.
ISS4	Fees are centralized and all funds collected by the Central Office.
Puerto Rico Specific Rules for Amendment Payments	
ISS5	The system allows a user to process an amendment request even if the full amount of the fee has not yet been received.
ISS6	If an amendment is processed without collecting the full fee, the record is flagged to prevent issuance of certified copies of that record until such time as the payment is collected through the system. A dollar amount field is tied to the "Payment Owed" flag, which is cumulative based on the amount of

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	fees associated with the record; the field provides the user the ability to enter the amount due. Once the full fee has been collected, the "Payment Owed" flag is removed, and the printing of certified copies is allowed.
Puerto Rico Specific Rules for No Cost Services	
ISS7	The system allows a user to override or waive a charge for a transaction that normally has a fee, if, for some reason, the location chooses not to charge the requestor. The system requires supervisory approval of a fee override.
ISS8	If a fee is waived, the system provides a list of options for a user to choose from regarding why the fee was waived. Reasons for waiving a fee are Jurisdiction defined.
ISS9	Free copies have an indicator in the request to indicate that the certified copies are provided at no cost.
ISS10	The system will keep a running total of free copies issued per record and will place a Jurisdiction-defined limit on how many free copies each record is eligible for. When the limit of free copies per record is reached, the event record will be flagged.
ISS11	When a user attempts to provide a free copy of a record after the limit is reached, the user receives a warning on the request.
ISS12	The list of customers eligible for free copies is defined by the Jurisdiction.
Puerto Rico Specific Rules for Replacement Copies	
ISS13	The system requires supervisor approval for replacement copies.
ISS14	Replacement copies have an indicator in the request and event record to indicate that the certified copies are replacements.
ISS15	The system will record a count of copies returned by a customer when replacement copies are issued. The system will place a Jurisdiction-defined limit on how many replacement copies each customer is eligible to order within a Jurisdiction-defined period of time. A flag is placed on the record when a limit is reached.
Puerto Rico Specific Rules for Receipts	
ISS16	The system allows a user to email a receipt to the recipient.

All customers requesting a service from the Demographic Registry are subject to confirmation of eligibility. If the customer is not eligible, the reason why is captured on the request and a rejection letter is provided to the customer in person or via mail.

Puerto Rico Specific Rules for Incomplete and Denied Requests	
ISS17	If a request cannot be processed (i.e., requestor is ineligible), a user selects a reason why and enters the date documents and payment were returned to the customer. Reasons why a request cannot be processed are Jurisdiction defined.
ISS18	A letter is generated by the system informing a customer of additional requirements if the customer has not presented all materials needed to process the request. The system populates letters from requests with the personal information on the request and the information needed to process the request, including the reason why the request cannot be processed. The reason why a request cannot be processed may be confidential and, as such, is not revealed to the customer. In these cases, the reason is not printed on the letter.
ISS19	The system allows a user to open a denied request and convert it to an open request, which can be processed once missing information is received.
Puerto Rico Specific Rules for Supervisory Overrides	
ISS20	If the system user believes that the system evaluation of acceptability of the request should be overridden, there is a function to allow a supervisor to enter an approval code for the override. This includes "one time issue." The system provides a comment box for a supervisor to enter the reason for the

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	override. The system provides a daily audit trail that details the use of the "fee override" by employee.
ISS21	A supervisory override is required for changes to "do not issue" flags.

7.2.20. Counter Orders

Customers requesting services may complete a paper application and submit the application at a counter. The application is used to create a request in the POS module and the customer's eligibility is verified. If the customer is not eligible, the user prints a rejection letter and closes the request.

Puerto Rico Specific Rules for Local Office Orders	
ISS22	Local Offices only create requests for counter orders and functionality for Local Offices is more limited than the Central Office. Request screens, edits, and field options for Local Offices are Jurisdiction defined.

7.2.21. Mail Orders

Mail requests are only accepted by the Central Office and can be paid with a money order or stamps. A request is created in POS module with the services, evidentiary documentation and payment received.

Mail requests paid with a money order cannot be processed immediately because the money order must be exchanged for stamps. At the end of each business day, all money orders are collected and exchanged for stamps, just like a check can be cashed. The stamps are brought back to the Central Office and associated with the correct requests. All stamp numbers associated with a request must be added onto the request. Once the stamps are receipted, the order can be processed.

Requests paid in stamps can be processed immediately.

Puerto Rico Specific Rules for Mail Orders	
ISS23	The system allows a user to receipt cash payment received with a mail request.
ISS24	If a money order accompanies a mail order and the amount received is more than the amount due, the user flags the order. The system provides a field for a user who receipts an overage to note the overage amount.
ISS25	Money orders received with mailed requests are collected at the end of each day and exchanged for the equivalent amount in stamps (like cash). The stamps are then allocated to the requests associated with the money orders. Orders originally paid with money orders require that the user enter the number of stamps and the stamp control numbers into the request record once the exchange is completed.

If the customer is not eligible or the application is incomplete (i.e., supporting documents are not included), a rejection letter is generated through the system. The rejection letter, supporting documentation, and payment are returned to the customer to re-submit.

7.2.22. VitalChek Orders

The VitalChek application is used to process online and phone requests for certified copies of records. The customer can submit their order through the VitalChek website or through VitalChek's toll free phone number. The customer's order is uploaded to the VitalChek server. The Central office logs into VitalChek, extracts orders from VitalChek, and uploads them to the system. VitalChek remits payment to the Central Office via EFT and the system generates a receipt. Orders are fulfilled and mailed out to the customer.

Refunds on VitalChek orders are processed by VitalChek and the cost of services are refunded.

Puerto Rico Specific Rules for VitalChek Orders	

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ISS26	Orders extracted from VitalChek display the fee for services, and not what the requestor actually paid.
ISS27	All requests queued from VitalChek site are marked "paid," as the customer's card has already been charged.
ISS28	On VitalChek orders, refunds may be processed if the request cannot be processed, the associated record(s) cannot be found, or the requestor is not eligible. Refunds are for the cost of the services ordered. VitalChek service fees are not refunded. The refund is processed by VitalChek and the request in the system is marked by a user to indicate that a refund will be processed.

7.2.23. Salud Digital

Salud Digital is an online platform that allows the public to order services and pay without stamps. Orders are entered on the website. Evidentiary documentation, ID, and payment are made through the platform. Demographic Registry staff work queues in the system to process the orders. Salud Digital orders are processed at the Central Office and at selected local offices.

Orders received through Salud Digital are added to the POS module as a new request, all documentation is added to the request and the online payment method is receipted. Eligibility is confirmed in the online order and the web platform notifies the customer of the update.

If the customer is not eligible, a rejection letter is printed and mailed. The online order is updated with a rejection status and closed.

Puerto Rico Specific Rules for Salud Digital Orders	
ISS29	The system provides a method for a user to upload a batch list of orders obtained through a third party online portal.
ISS30	The system provides the user with an Online Request Queue for requests submitted online.
ISS31	The system captures the online request confirmation number in the EVRS request so that a user can look up an online order by entering a combination of the customer's confirmation number and last name.
ISS32	Orders extracted from online ordering portals display the fee for services, and not what the requestor actually paid.
ISS33	The system provides the ability to print out a receipt as part of, or in addition to, the EVRS receipt.
ISS34	The order may be mailed out to the customer or held for pickup. The system provides an indicator if the order will be picked up.

7.2.24. Fulfillment

Requests received at a counter, VitalChek, or another online web portal can be entered into the POS module and fulfilled immediately. Alternatively, requests can be worked from a queue. Mail requests cannot be fulfilled until the money order is exchanged for stamps. While the request is open, the user searches for the record(s) requested.

When a record search is performed, there are a few options about how the process will continue:

1. The record is found and the order can be processed;
2. The record is found but is flagged to prevent issuance or amendments; or
3. The record cannot be found.

Puerto Rico Specific Rules for Flags and Indicators	
ISS35	The system checks file flags and indicators on each record to determine if the issues being identified by the indicator or flag affect the user's ability to fill the request.
ISS36	When a record has an "insufficient payment" flag, an authorized user can access the notes in the system to determine if the payment to be collected is

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	different than the standard fee. If there is no note in the system for a record with an "insufficient payment" flag, the user can remove the flag.

If the record is found but cannot be issued or amended, the customer is informed and the request is held in a pending queue until the record can be processed. A letter describing what is needed is printed and provided to the customer with the next steps.

Puerto Rico Specific Rules for Unregistered Records	
ISS37	The system provides a queue for requests received for a record which has not been registered and is over a Jurisdiction-specified number of days after the event date.
ISS38	After a Jurisdiction-defined period of time (for example, 2 weeks of DOB/DOD), requests in the Pending Request Queue generate an alert that is sent to the Registration unit, informing them that the request is still awaiting registration.
ISS39	When the system determines that a record has been registered, the request that is being held moves into a queue for fulfillment.
Puerto Rico Specific Rules for Abandoned Requests	
ISS40	The system automatically abandons pending requests with no activity at the end of a Jurisdiction-defined period of time.

If there is concern that the request is fraudulent or a record is being fraudulently represented, the request and/or record can be flagged for investigation.

Puerto Rico Specific Rules for Fraud Flags	
ISS41	If the user believes the request is fraudulent, they are able to flag the request as such (for example, selecting a check box). The record is queued for the Fraud Unit to investigate. A field is available for the user to type in a reason why they are flagging the request for potential fraud.
ISS42	If a request is flagged for potential fraud, no action (ex. issuance, amendment) can be performed on the request. Users associated with the Fraud Unit can issue a verification form.
ISS43	The system has a flag that can be applied to a registered or unregistered record if there is suspicion of fraud associated with the record. When a user creates a request and associates a record with the record, if there are past requests that are flagged as potentially fraudulent, a notice is available informing the user information about prior potentially fraudulent requests. Information provided on the notice is Jurisdiction defined.

If the record is not found, the request is sent to the Vault to search for the paper certificate, if the record was filed on paper. The paper certificate, once found, is added to the system through the back data entry functionality. The back data entry process includes data entry into the system as well as adding an image of the record. If the paper certificate cannot be located, the Vault indicates this in the system. Staff will print a "No Record Found" letter to be sent to the customer with a partial refund. If the request was received by mail, all but a $2 stamp is refunded to the customer. If the request came from a counter, all but a $5 stamp is refunded to the customer.

Puerto Rico Specific Rules for No Record Found Refunds	
ISS44	If a "No Record Found" letter is issued, all but a set amount ($5 for birth, $10 for death or marriage) per registrant ordered is returned.
ISS45	If a "No Record Found" letter is issued on a mail order, an additional $2 is kept by the Central Office.

Once the record is located and can be processed, the request is fulfilled. After issuing a record, the certificate is QA'ed for print errors. When printing errors are present, the security paper is voided and the certificate is re-issued. Once a certificate is printed without

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errors, it is delivered to the customer based on the method the request was received. Any additional services on the request can be processed.

Puerto Rico Specific Rules for Printing	
ISS46	Short Forms have dynamic logic for Jurisdiction-defined fields. Short forms for issuance of birth, death, and marriage records only display field headers if there is data to print on the certificate. If no data is available to print, the form is adjusted to fill in the blank space where the header and data would be printed.
ISS47	If the name on a record is below Jurisdiction-defined number of characters, the system flags the record. This is to catch any records that may have been entered into a legacy system with partial names. If a record contains a flag that the name has been truncated, the system allows a user to view the image and type in the remainder of the name so that it may print correctly without having to create an amendment.
Puerto Rico Specific Rules for Printing Birth Records	
ISS48	The system tracks and alerts the user of birth certificates that have been printed a Jurisdiction-defined number of times within a Jurisdiction-defined period of time across all offices. The system flags a record and throws an alert when a user attempts to fulfill an order for certified copies of a birth certificate if the request exceeds a Jurisdiction-defined number of requests within a Jurisdiction-defined time period across all offices. An override is required before the request can be filled.
ISS49	The system tracks and provides an alert when more than the Jurisdiction-defined number of requests for the same birth certificate have been received across all offices.
ISS50	If a birth record is being held because it contains a flag that a voluntary acknowledgement or legitimation order is in process, the system does not allow the printing of a certified copy of the birth record. The system allows supervisory override.
Puerto Rico Specific Rules for Printing Death Records	
ISS51	The system maintains a table of ICD codes and associated written descriptions. When issuing a short form of a death record registered from January 18, 2021 to present, the literal text of the immediate cause of death is listed as the cause of death. Legacy records, registered prior to January 18, 2021, are issued with the first ICD code description on the short form.
ISS52	If a legacy record, registered prior to January 18, 2021, is amended to update the COD, all subsequently issued short forms will list the literal text of the immediate cause of death.
ISS53	Long form death issuance always includes the complete literal cause of death.
Puerto Rico Specific Rules for Printing Genealogy	
ISS54	Genealogy reports may include multiple pages such as images of original records and other supporting documents on file.
Puerto Rico Specific Rules for Printing QA and Security Paper	
ISS55	When an error is found in the printing of the record after the request has been completed (i.e., damaged security paper), a user can access the request, void the document control numbers, and reissue the record.
ISS56	The system requires a user to select from a Jurisdiction-defined drop-down list of options for the reason why a DCN has been voided. The system provides the user with a field to explain more information when a DCN was voided.
ISS57	The system requires the user to confirm that the printed security paper number matches the system assigned security paper number.

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ISS58	Request and record history capture document control numbers so each DCN captured is tied the document type issued. This is important if multiple document types were ordered in one request.
ISS59	The system automatically checks to see if the security paper number being entered is assigned to the user's location. If the system notifies a user that the security paper number is not available or assigned to the location, a user at the Central Office can make corrections using the Inventory Module before an update to that record can be completed.
Puerto Rico Specific Rules for Re-Issuance	
ISS60	The system provides the ability to void replaced copies from a previous request that have been returned, usually because an amendment has been processed and new copies are being produced.
ISS61	Users are limited to one re-issuance per certificate on an order in the case where the document control number has to be voided after issuance. If additional re-issuances are required, a supervisor must override the limit.
ISS62	Supervisors are not limited to the one re-issuance rule.
ISS63	Reprints are not included in sales reporting as a new sale.
Puerto Rico Specific Rules for Completing Requests	
ISS64	The system sends an email notification to the customer upon release of an order if an email address was provided.
ISS65	A user can reopen a closed request.
Puerto Rico Specific Rules for Returned Mail and Re-Mails	
ISS66	The system allows a closed request to be opened when a mailed certificate is returned.
ISS67	No fee is associated with a re-mail.
ISS68	The system provides a way to indicate that the request has been re-mailed.
ISS69	Only one re-mail is allowed per request.
ISS70	The system displays a prompt for the user when a re-mailed request is returned informing them this is the second return. The system allows authorized users to void inventory control numbers on returned certificates.

7.2.25. Daily Accounting

The system supports standard accounting practices including individual user drawer assignment, separation of drawers (i.e., all VitalChek orders are posted to a designated drawer separate from the counter drawers), and drawer opening and closing. Fees for services as well as methods of payment are Jurisdiction defined and configurable.

Puerto Rico Specific Rules for Daily Accounting	
A1	Transactions from online portals are listed separately by event and are counted as drawer funds. The total transaction amounts received from the online portals are balanced against payments received from the online portal Payment received through online portals may be deposited directly into the Jurisdiction account.
A2	The system allows a user to run a report on a Jurisdiction-defined timeframe to reconcile the payments received from each online portal that have been directly deposited in the Jurisdiction's account. The system generates a report showing all online portal sales for a Jurisdiction-defined period

At the end of each day, drawers are closed out and reconciled. Users validate the stamps in their drawer and a summary of security paper used during the day. If a discrepancy in either payment or security paper is found, the user will review the day's transactions, determine the differences, and make the appropriate corrections. If no discrepancies are found, the supervisor will consolidate all drawers for deposit, then verify the stamps and security paper. Once verified, the drawers are closed.

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	Puerto Rico Specific Rules for Drawer Closing
A3	A user may request the system to display current totals at any time during the day.
A4	Drawers may be closed by a user regardless of whether or not they worked with that drawer during the day.
A5	Balancing reports can be displayed or printed multiple times.
A6	The system displays a summary total of the day's transactions and the total amount collected by payment type.
A7	The system provides a field for the user to indicate they have validated cash and paper for the day.
A8	The system provides a field for the supervisor to indicate they have validated the cash and paper for the day.
A9	Both the drawer user and supervisor must indicate they have validated the cash and paper for the drawer to be closed.
A10	The system provides a way to indicate that the drawer has been reconciled and closed every time a user logs out during the day. No new transactions can be added while the user is logged out.
A11	The system allows a user to reopen a reconciled drawer in the same day to continue transactions within Jurisdiction-defined time frame (ex: 8am-4pm Monday-Friday).
A12	The system allows the closing time for drawers to occur at a user defined time during the day that may be different from "end of day".
A13	The system provides a way to check to see that all drawers have been closed.
A14	The system provides a way to indicate that the drawer has been reconciled at the end of the business day so no new transactions can be added.
A15	A user can display/print a report showing the consolidation of all payments collected by payment type for all drawers for the office.
A16	The employee who recounts the money to determine that the total balance to the consolidated report needs the same functionality to be able to scroll through transactions by drawer or print a report to spot problems and to enter corrections.
	Puerto Rico Specific Rules for Correcting Drawer Errors
A17	If the figures do not balance, the system allows a user to scroll through the day's transactions to determine the problem. Options for sorting and filtering transactions are Jurisdiction-defined.
A18	If there are errors created through normal business functions, the system allows for their correction and a reason for the change along with a comment. The system captures all changes made to drawers in an audit log.
A19	The system captures the employee ID of the person making the correction whenever a drawer correction is made.
A20	For errors that a user cannot resolve, the system requires supervisor assistance with reconciliation.
A21	The drawer may be closed even if the payments do not balance due to an over/short situation.
A22	Overages are reflected on the daily reports.
A23	Shortages are only applicable to certain payment methods. Payment methods where a shortage is acceptable are Jurisdiction defined.
A24	A shortage opens a comment box for the user to enter a justification.
A25	An overage opens a comment box for the user to enter a justification.
A26	Total sales data can be sorted by Jurisdiction defined criteria.

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At the end of each month, supervisors collect all voided security paper from their office and send the voided paper to the Central Office for reconciliation. The Finance Office reviews a report of all funds encumbered and voided security paper. All voided security paper on the report must be returned to the Central Office for destruction and are accounted for each month.

An end-of-the-month funds report is sent to the Department of Treasury and funds are deposited into a general account based on the stamps collected. This report, "Informe de Recaudos", has a specified format. Vendors are encouraged to look at the detailed requirements of this report found in the Forms and Reports Attachment D. There is only one general account where all funds are deposited and the Central Office requests disbursement.

7.2.26. Government Search Invoicing

Some government agencies have contracted with the Central Office to perform verification searches. The contracts allow for authorized user roles to perform searches of birth, death, and marriage records. Results from these searches are limited fields that are contractually defined. Every few of a record incurs a small fee. At the end of each month, the Central Office invoices the agencies for payment of the record views. Payment is remitted via EFT.

Puerto Rico Specific Rules for Government Search Invoicing	
A29	The system tracks record views in a way that can be summarized to invoice for payment.
A30	The system generates an invoice for records viewed.
A31	The invoice format for government agency views may be different than the invoice used for other billable accounts.
A32	The format of the invoice is jurisdiction defined and configurable.
A33	Accounts for viewing records may be setup as a pay down account with a balance at the start of the fiscal year.

7.2.27. Point of Sale Bonus Business Rules

Cash is not accepted as a form of payment. In the requirements, the term cash means stamps.

Bonus rules pertaining to Point of Sale and Accounting are those that the EVRS vendor may provide to Puerto Rico. Vendors must provide a response to each rule in **the workbook Exhibit E.1 (spreadsheet titled Point of Sale and Accounting)**.

7.2.28. Registration Process and Requirements

Death and marriage records are automatically registered upon submission of a complete record (all hard edits are addressed, and soft edits have validations provided). At the time of registration, a National File Number (NFN) is applied to the record. Registered records are immediately available to the Central and local offices for issuance and other services.

All birth and fetal death records are reviewed by the Central Office prior to registration. This allows the Central Office to validate the information on the records against documentation from the facility and correct any minor errors.

Puerto Rico Specific Rules for Birth and Fetal Death Registration	
R1	The system allows a user to note that they have verified out-of-range entries in such a way that these entries are accepted by NCHS without generating an error. The notations are sent accordingly in the IJE.
Puerto Rico Specific Rules for Pre-Registration Corrections	
R2	The system allows a user to correct errors on the record prior to registration. Errors are identified by comparison of the electronic record and the signed verification.

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R3	If fields in a signed section of a record require correction, the user who signed the record must make the corrections.
R4	All standard edits fire on unregistered records when corrections are being made.
R5	Edits may include changing responses to "Other" fields to meet another available option. If an authorized user updates an "Other" value, both the original value entered by the end user and the updated value are maintained in the system database along with the user ID of the person who corrected it and the reason for the change.
R6	When "other" or "unknown" is provided, the user is prompted to enter a reason before moving onto the next field.

Event records that are registered with soft edit exception flags are queued at the Central Office by type of event and exception. These queues will be Jurisdiction defined. Central Office staff will review and query these records as appropriate.

Puerto Rico Specific Rules for Special Registrations	
R7	Special registrations are started with a request in the POS module.
R8	Special registrations require a fee to be processed. The fees for special registrations are Jurisdiction defined and configurable.
Puerto Rico Specific Rules for Report of Foreign Born Adoption	
R9	The system provides data entry screens unique to the Report of Foreign Born Adoption record.
R10	The system requires a user to upload Jurisdiction defined supporting documentation to a Report of Foreign Born adoption record.
R11	The system assigns a unique number to each foreign born adoption entered. The format is Jurisdiction defined and is not equivalent to a NFN.
Puerto Rico Specific Rules for Court Order Births	
R12	The system requires a user to indicate that the original court order was received at the Central Office and that the court order be uploaded to the record before the record can be registered.
Puerto Rico Specific Rules for Resident Deaths Abroad	
R13	When notified of a death in a foreign country of a resident or someone born in the jurisdiction, a user can data enter the information into the system.
R14	The system assigns a unique number to each resident death abroad entered. The format is Jurisdiction defined and is not equivalent to a NFN.
R15	The system automatically flags all international death records as "Do not issue."
R16	The system does not generate a transit permit on an international death record.
R17	The system allows a user to generate a disposition permit for an international deaths. All rules related to Disposition Permits apply to international deaths.

7.2.29. Post Registration Process for Vital Records

After a record has been registered several processes take place. Processes include:

- Birth/Death Cross Match
- Issuance
- Amendments
- SSA Fact of Death
- SSA Enumeration at Birth
- NCHS Transmission
- Extracts for Vital Statistics

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- Reports
- Data Quality Assurance
- Registry Reporting

Puerto Rico Specific Rules for Post-Registration Exception Review	
R18	All legal fields are locked when a record is reviewed for exceptions after registration.
R19	The system requires a user to take specific action to indicate that all exceptions on a registered record have been reviewed and accepted. Upon taking the action to indicate that all exceptions have been accepted on a registered record, the corresponding exception flag is removed from the record.

7.2.30. Query Cycle Process and Requirements

Records queued with soft edit exceptions are reviewed at the Central Office. The Central Office may review verifications on the record and validate the exception or query an original owner to confirm information.

In the case of querying the record, the record is flagged and queued for the appropriate original owner. A message is sent to the original owner indicating queried records are pending review. The original owner can respond to the query through the system or can submit an amendment to correct the error. If an amendment is filed, the amendment is processed following standard amendment rules and the query flag is removed from the record.

Queried records retain their NFN, file date, and any electronic signatures.

Puerto Rico Specific Rules for Querying	
Q1	The system allows a user to query a registered record electronically through the system.
Q2	When a query is sent, the record is flagged as "query pending."
Q3	When a response is received for a query from the record originator, the record history is updated to indicate that a response has been received.
Q4	The system requires a user to select a reason when resolving a query. Options for query resolution are Jurisdiction defined.

7.2.31. Out of State Process and Requirements

Information regarding residents who give birth or die in another state may be received from the other states through the FHIR-enabled STEVE format, IJE flat file, or on paper. In addition, for non-residents who were born in the jurisdiction but die out of the Jurisdiction, information can be received in the same manner (roster records).

The system retains the state file number assigned by another state - a unique Jurisdictional file number is not assigned by the system. All out-of-state events are for statistical purposes only and can only be viewed or printed by Vital Statistics. No Jurisdictional facility may issue copies of out-of-state certificates or supply information about these records. Once in the EVRS, the records are available for the Birth Death Cross Match process.

Puerto Rico Specific Rules for Out of State Records	
OOS1	The system produces a report that confirms the total number of records contained in the OOS import file, the total number of records that were successfully uploaded, and the total number of records that failed edit checks.
OOS2	The system generates an error report for any records that do not import correctly into the system.

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OOS3	The system checks for duplicate records upon import. If the system finds a duplicate record and the record has an "updated" indicator in the import file, the new record version replaces the existing record.
OOS4	When FHIR messages are ingested, the system applies the same duplicate check, error, and report rules used when a file is imported.
OOS5	The system has a soft edit to check that residency is Puerto Rico.
OOS6	The system has a soft edit to check for a Puerto Rico resident birth.
OOS7	The system does not request an SSN for an out-of-Jurisdiction birth record.

7.2.32. Marriage and Divorce Process and Requirements

7.2.32.1. Marriage

Local offices provide instructions to applicants about the marriage process, issue the license, and register the certificate after the ceremony.

Applicants can apply for a marriage license in person at any local office or through Salud Digital. All documentation is provided and verified by the local office prior to issuance of the license and a copy of the certificate. The license and certificate are completed by the officiant and returned to a local office for registration. Staff validate that the marriage was performed by an authorized officiant within the legally required timeframe. Once verified, the certificate is registered.

Puerto Rico Specific Rules for Linking Death and Birth Records to Marriage Licenses	
MD1	A certified birth certificate is only required if the applicant was born outside the jurisdiction. The system provides cross field edit check to remind the user that the birth certificate must be scanned and attached to the record
MD2	If the applicant was born within the jurisdiction, the system allows the user to perform a birth search and link the birth record to the marriage license.
MD3	If the applicant's parent died within the jurisdiction, the system allows the user to perform a death search and link the death record to the marriage license.
MD4	If the applicant's former spouse died within the jurisdiction, the system allows the user to perform a death search and link the death record to the marriage license.
Puerto Rico Specific Rules for Minors	
MD5	If the applicant is a minor (age 18-20 years old), they must be accompanied by both parents/guardians/legal custodians.
MD6	If the applicant is not accompanied by both parents/guardians/legal custodians, they must present proof from one of the following: court order from the outstanding parent, sworn statement of approval from the outstanding parent, or death certificate for the outstanding parent. If the court order presented for a minor applicant in lieu of parental presence was issued in another jurisdiction, it must include a validation from a courthouse exequatur.
MD7	If a minor applicant has been emancipated, then additional documentation from parents/guardians/legal custodians is not required. Proof of emancipation is required.
MD8	If the applicant was emancipated within the jurisdiction, the system allows the user to perform an emancipation or marriage search and link the record to the marriage license. All emancipations are registered on a birth record, emancipation registry, or are granted by marriage.

If the marriage ceremony was performed outside the approved timeframe or the officiant was not authorized, the ceremony is invalid. The applicants must restart the process.

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Puerto Rico Specific Rules for Invalid Marriage Requests	
MD9	If the officiant is not authorized in the EVRS to perform marriage ceremonies in Puerto Rico, the user receives a notice that the record cannot be registered.
MD10	The system prevents local users from registering a marriage if the completed license is returned more than 364 days after the ceremony date.
MD11	If the certificate cannot be registered, the marriage request is closed. The license and certificate paperwork associated with the request cannot be used again in the future for registration. The system does not allow a closed marriage request to be reopened.

Valid marriage ceremonies that were not registered within one (1) year of the ceremony must be registered by the Central Office as delayed.

Puerto Rico Specific Rules for Delayed Marriage	
MD12	System shall allow entry of a Delayed Marriage.

7.2.32.2. Divorce

Divorces are processed by a courthouse or a Notary Public. Registration is done at the Central Office as an annotation to the marriage record.

A notary public can only perform a divorce if the spouses are citing mutual consent or irreconcilable differences; notary public divorces are processed as public deeds. All divorces that include disputes between spouses must be decreed by a court. Upon receipt of a public deed or divorce decree, the Central Office will search for the marriage record to annotate the divorce on the marriage record. The information from the divorce that is captured depends on whether the marriage, divorce, or both were recorded in the Jurisdiction.

1. If the divorce was completed in the Jurisdiction but the marriage performed outside the Jurisdiction, only basic information from the divorce is captured for statistical use.
2. If the divorce was completed outside the Jurisdiction but the marriage was performed within the Jurisdiction, the divorce decree must include a certification from an exequatur of a courthouse within the Jurisdiction. Once the certification and decree are provided, the divorce is annotated on the marriage record.
3. If both the divorce and marriage were performed within the Jurisdiction, the divorce is annotated on the marriage record.

Annulments are processed the same as divorces, depending on the annulment and marriage locations.

Puerto Rico Specific Rules for Divorce	
MD13	The system allows the Central Office to maintain tables of courts to facilitate data entry.
MD14	If the divorce was decreed within the jurisdiction, the system allows the user to perform a divorce search and link the previous divorce with the marriage license.
Puerto Rico Specific Rules for Divorce in Jurisdiction, Marriage OOS	
MD15	If a divorce is processed within PR, but the marriage occurred outside of PR, only basic statistical information about the divorce is recorded. The system allows the user to indicate the marriage was performed outside the jurisdiction and only statistical information is captured. Statistical information captured is Jurisdiction defined.
Puerto Rico Specific Rules for Divorce OOS, Marriage in Jurisdiction	
MD16	If the marriage was registered in PR and divorce occurred outside PR, PR will annotate the divorce on the marriage record. The system provides Jurisdiction defined data fields to document the divorce information on the marriage record.
MD17	If the divorce was decreed outside the Jurisdiction, the system requires the user to upload the courthouse exequatur certification.

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Puerto Rico Specific Rules for Divorce and Marriage in Jurisdiction	
MD18	If the marriage and divorce occurred in PR, PR will annotate the divorce on the marriage record. The system provides Jurisdiction defined data fields to document the divorce information on the marriage record.
MD19	The system requires the user to upload a public deed or divorce decree to the marriage record when the divorce information is added.
MD20	The system retains a document history list for each record that shows when the divorce was annotated on the marriage record.

7.2.33. Birth Death Cross Match Process and Requirements

Birth Death Cross Match works in two ways:

1. It runs each time a death record is registered in the system and if a match is found, the birth and death records are automatically linked. The appropriate information is automatically placed on each record without human intervention.
    Automatic matches are queued for a user to review and determine if the system-generated match is truly a match.
2. It can be initiated and run at any time through manual intervention.

All infant deaths (under 12 months of age) are placed in an Infant Death Queue. Birth Death Cross Match includes out-of-Jurisdiction death records.

Puerto Rico Specific Rules for Birth Death Cross Match	
BD1	If a match is found with an Index record, the system places a flag on the index record and queues the flagged record for the vault.
BD2	Deaths under 12 months of age are considered to be an infant death and an indicator is placed on the record for the purpose of running reports.
BD3	The Birth Death Cross Match may be scheduled to run on a Jurisdiction defined schedule.
BD4	Unmatched records are periodically re-run against the birth database in case of an addition or change in the content of the birth records. The Jurisdiction sets the length of the period where a record is in queue for automatic re-matches.

7.2.34. Birth Death Cross Match Bonus Business Rules

Bonus rules pertaining to Birth Death Cross Match are those that the EVRS vendor may provide to Puerto Rico. Vendors must provide a response to each rule in **the workbook Exhibit E.1 (spreadsheet titled BDCM)**.

7.2.35. New User Setup Process and Requirements

Potential system users reach out to the Jurisdiction and complete a user agreement form, which ideally could be done online. The signed user agreement form is submitted to the Jurisdiction. The Jurisdiction reviews the forms to confirm the person is entitled to have access to the EVRS and sets up the user's account.

If the user is a professional, their license number is used to check the professional licensing database to make sure the license exists and is not expired.

For death: Funeral directors and embalmers are separately licensed in the Jurisdiction, but it is not uncommon for someone to be dual-licensed. In this scenario, only one user account should be required with separate functionality for each user role. Each user role would be tied to the appropriate licensure.

Puerto Rico Specific Rules for Death User Setup	
NU1	In the case of funeral directors, the user may also be licensed as an embalmer. The system allows the user to submit a single account request when dual licensed.

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NU2	The system has to accommodate assigning multiple user types to an individual user (i.e. funeral director and embalmer; pediatrician and pronouncer).
NU3	The system provides fields to enter license number by user type (i.e., funeral director license number and embalmer license number).

7.2.36. New User Setup Bonus Business Rules

Bonus rules pertaining to New User Setup are those that the EVRS vendor may provide to Puerto Rico. Vendors must provide a response to each rule in **the workbook Exhibit E.1 (spreadsheet titled New User Setup)**.

7.2.37. Annotation Process and Requirements

There are two types of annotations: Alias/AKA and Emancipation. Annotations are added to a registered record and are printed on certified copies. Annotations are processed similar to amendments as they require specific supporting documentation or a court order and are added to a registered record.

Alias annotations support identification of an individual on a birth certificate if they go by names other than their birth name.

In some circumstances, emancipation is granted by Jurisdiction courts even if the juvenile was not born in the Jurisdiction. In these cases, a unique emancipation record would be created with the most basic information about the juvenile and their emancipation. Emancipation annotations allow juveniles the ability to prove they are an emancipated minor. Emancipation annotations are only printed on a birth certificate until the registrant is 21 years old.

Annotations are only processed at the Central Office. Requests are primarily received from a customer, but occasionally a court order will be submitted by a courthouse. Requests from customers go through eligibility review and require payment. Requests from a courthouse are not subject to payment before processing; they are flagged "Do Not Issue" until payment is received from a customer.

Puerto Rico Specific Rules for Orders from a Courthouse	
ANN1	The system provides a way for the user to indicate that a court order was received directly from a courthouse for processing.
ANN2	If the annotation was received directly from a court, payment is not required to process the annotation. If the annotation was from a courthouse and no payment was received for processing, the annotation is flagged "Do Not Issue".

Once the birth record is located, the annotation is added. Annotations are captured on a record as unique fields on the record. When the annotated record is issued, the annotation prints on the certified birth certificate. Emancipation annotations appear on the certified birth certificate until the registrant is 21 years old, as determined by a system calculation between the date of birth and issuance date. Copies of emancipation orders can also be issued.

Puerto Rico Specific Rules for Processing Annotations	
ANN3	Annotation screens are Jurisdiction defined. Fields for annotations are only available when an annotation is being processed. The fields are unavailable during registration or amendments.
ANN4	The system requires a court order or public deed be uploaded to the annotation.
ANN5	Annotations on registered records trigger the creation of a change history record. The fields are Jurisdiction defined and includes but are not limited to added data, date of the change, person requesting change and person approving change, if applicable.

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ANN6	Annotation records are linked to the original record.
ANN7	The system prompts the user to send a record for back data entry if the record is incomplete when s/he attempts to create an annotation. Once all information on a record is entered into the system through back data entry, the system allows the user to annotate the record.
ANN8	Once the annotation is complete, the record is queued for the vault to print a report of changes made on the record.
Puerto Rico Specific Rules for Emancipations	
ANN9	If an emancipation is processed on a birth record, the system marks the record as "emancipated."
ANN10	The system applies a unique Emancipation Number to each emancipation transaction. Emancipations are numbered beginning with 1 each year, regardless of whether there is a PR birth to link with the emancipation.
Puerto Rico Specific Rules for Alias/AKA Annotations	
ANN11	The system applies a unique Alias Number to each alias transaction. Numbers begin with 1 each year.
Puerto Rico Specific Rules for Issuance with Annotations	
ANN12	Payment must be receipted prior to issuing a certified copy of emancipation documents.
ANN13	Once an annotation is registered, the annotation prints in a designated location on certified copies of birth certificates.
ANN14	If an alias/AKA was added to a birth record, the short form is issued in a modified layout that includes a header as well as the names for the alias/AKA that was added.
ANN15	Emancipation annotations only print on certified birth certificates until the registrant is 21 years old.

If a birth record cannot be located, a distinct emancipation record is created without a birth record because the Central Office must maintain a registry. If the request is for an alias/AKA name, the request is closed and the customer instructed how to file for a delayed birth registration.

Puerto Rico Specific Rules for Emancipations without a Birth Record	
ANN16	The system supports creating emancipation records that are not linked to an existing birth record.
ANN17	Emancipations created without a birth record can be linked to a birth record if a delayed birth registration is completed at a later time.

7.2.38. Back Data Entry Process and Requirements

The Jurisdiction has a large number of records that were registered on paper and never entered into an electronic system, or only partial information was entered. To move towards standard issuance processes and limit fraud potential, these records need to be fully entered into an electronic system.

Puerto Rico Specific Rules for Back Data Entry	
BDE1	The user may view the image of a legacy record on a separate monitor screen while entering data on a different monitor screen (dual monitor screens).
BDE2	The system allows the user to update or "back fill" missing data for a legacy record in order to create a complete electronic record. Missing fields may include amendment information, dates and footnotes.
BDE3	For legacy records which have no electronic record, the system allows the user to create an electronic record.
BDE4	Record fields available during back data entry match the layout of the death certificate from the time period when the record was registered.

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BDE5	The user must take an actionable step (e.g., click a button) to release a back data entered record for issuance and amendment.

When a request for issuance or amendment is received and the electronic record does not exist or is incomplete, the record is queued for back data entry. Back data entry is only performed at the Vault because they have the original paper certificates. The Vault adds the record or backfills missing data from the paper and uploads an image of the paper certificate. The new or updated record is reviewed for accuracy and approved, then returned to the appropriate queue for request processing.

Puerto Rico Specific Rules for Issuing Back Data Entered Records	
BDE6	The system provides the user with the option of printing a legacy record of any event type in the format defined by the Jurisdiction.
BDE7	The system provides the user with the option of printing a legacy record of any event type from an image.
BDE8	Legacy records that have been backfilled can print from the image in the system or directly from the data record.
BDE9	The system allows a user to flag a legacy record as "all data entered" so that future issuance is from the electronic record instead of the record image.
BDE10	The system recognizes legacy records that have multiple pages that need to be printed on security paper; the system captures all document control numbers related to the request.
BDE11	A user may manually assign a DCN to a record, in the rare instance where a certified copy is issued manually. Records registered on paper are only maintained at the vault, which is in a separate location from any Demographic Registry offices. Standard issuance of legacy records will occur from an image or electronic record, if the electronic record is backfilled completely.

7.2.39. Maternal Death Infant Linkage Process and Requirements

Maternal deaths are an important public health issue to address; however, data quality has not always been high enough quality to support public health action. Currently, jurisdictions work with the CDC's Division of Reproductive Health (DRH) to provide death, birth, and fetal death data files through STEVE. DRH uses the data shared and performs matching to link maternal deaths to birth and/or fetal death records. As part of the data modernization initiative, NCHS has funded each jurisdiction to improve their process and capabilities for linking maternal death records with birth and fetal death records. This process is envisioned to work very similar to birth-death cross match.

When a death is registered with information indicating the death is associated with pregnancy, the system will conduct a search of birth and fetal death records to check for the decedent's name listed as the birth mother. If a match is found, and the delivery is within a specific time period, the records will be linked, and data will be added to each record. Potential maternal deaths without a linked record will be queued for review and validation. Users will have the ability to manually link records after conducting comprehensive searches. The linked records will be exported to a layout that will be defined with appropriate partners for use by public health programs involved in maternal death prevention efforts.

7.2.40. Maternal Death Infant Linkage Bonus Business Rules

Bonus rules pertaining to Maternal Death Infant Linkage are those that the EVRS vendor may provide to Puerto Rico. Vendors must provide a response to each rule in **the workbook Exhibit E.1 (spreadsheet titled Maternal Death)**.

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7.2.41. Security Paper Order, Distribution and Reconciliation Process and Requirements

Security paper and other forms are issued to specific users within the Central Office and at each of the local offices. To request resupply, a supervisor logs into the system, selects the inventory menu option, and accesses the Inventory Request Form. The requestor completes the Inventory Request Form and electronically submits the request to the inventory control person(s) at the Central Office.

Inventory control logs into the system and selects the Inventory Request queue. The request is reviewed for reasonableness. If there are questions about the request, the inventory control person(s) will contact the requestor. If there are not any questions, the inventory control person(s) fills the order and allocates the inventory. Contact may happen through the system via messaging.

The requested inventory is delivered to the requestor, with the exception of security paper. Security paper is delivered by the paper vendor directly to the requestor, all other forms are distributed by the Central Office. The requestor verifies the shipment against the invoice received at delivery. The user logs into the system and updates the order as received, enters document control numbers (DCNs), and uploads the invoice.

Puerto Rico Specific Rules for Entering Received Inventory	
INV1	The system prompts for the range of numbers to be checked out to the requestor's location.
INV2	A range can be only one number or a range of numbers.
INV3	Inventory number ranges are sequential.
INV4	Numbered inventory can be checked in by entering a beginning and ending inventory number.
INV5	The system assigns the quantity specified and the number range from an inventory manager to the specific requestor.
INV6	The system recognizes that the range includes all the numbers in between and determines the quantity accordingly.
INV7	The system allows users to designate receipt of multiple ranges of security paper numbers to account for breaks in numbering and different numbering sequences.
INV8	The requestor enters the total quantity received.
INV9	The system validates the total quantity calculated from the range of numbers entered to the quantity entered by the user to make sure they are the same.
INV10	The system requires the requestor to confirm the number received to attest to the accuracy of the information entered.
INV11	The quantity received is compared to the quantity ordered and a message is displayed if they do not match.
INV12	The requestor retrieves the original receipt in the system to check in the inventory.
INV13	Users can change either the range of numbers or the quantity and rerun the edit to determine if the two agree.
INV14	If the user determines that the discrepancy is real, the order is updated to reflect the difference.
INV15	The system alerts an inventory manager of any discrepancies between the security paper shipped to the location and the security paper received by the location.
INV16	The system checks to make sure numbers being received have not already been assigned or used by this location or any other location by checking both the inventory in stock and used inventory.

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INV17	The system alerts an inventory manager if the requestor does not mark the shipment as received within a Jurisdiction defined period of time.
INV18	The system requires the user upload the paper invoice to the order before submission to an inventory manager.
INV19	Once paper is entered by the requestor and passes system validations, the user submits the order for approval and allocation.

The system queues the order for review by the inventory control person. The inventory control person logs into the system, verifies the DCNs against the uploaded invoice, and allocates the paper to the receiving office or work unit. The supervisor is notified of paper allocation and assigns inventory to individual users.

Puerto Rico Specific Rules for Using Inventory	
INV20	The system allows an authorized user to assign inventory to individual users.
INV21	Authorized users will sign into the system at the beginning of each day and assign paper to each printer by entering the starting control number for each printer.
INV22	Authorized users will sign into the system at the end of each day and enter that security paper was removed from each printer by entering the ending control number for each printer.
Puerto Rico Specific Rules for Discrepancies and Adjustments	
INV23	If the starting or ending control number is out of sequence, the system alerts the user and prevents printing until an override is performed.
INV24	The system automatically notifies users when a discrepancy in inventory is detected.
INV25	An inventory manager can make changes to the security paper numbers assigned to locations or issuance history in order to resolve inventory issues.
INV26	All adjustments to inventory require entry of a reason. Reasons are Jurisdiction defined.
INV27	All adjustments to inventory include the ability to add a comment.
INV28	The system automatically records usage by security paper number during issuance.
Puerto Rico Specific Rules for Inventory Management	
INV29	The system has the ability for an inventory manager user to accept returned secured inventory items from one location and assign them to another.
INV30	A user can request inventory to be transferred from one location to another.
INV31	If, after comparing the physical inventory at a location to the system inventory status report and discrepancies exist, an inventory manager can adjust the system to make the electronic record match the physical inventory.
INV32	The system provides the ability for a user to analyze inventory usage across one or more locations.
INV33	The system provides the ability for an inventory manager to display the associated receipt number for numbers that have a status of "used" for any document control number.

Security paper inventory is updated automatically as it is used by individual users. Security paper inventory reports are printed on a periodic basis and inventory is reconciled by a supervisor. Any discrepancies identified by a local office are reported to the Central Office for necessary adjustments to be entered into the system.

7.2.42. Security Paper Order, Distribution and Reconciliation Bonus Business Rules

Bonus rules pertaining to Security Paper Order, Distribution and Reconciliation are those that the EVRS vendor may provide to Puerto Rico. Vendors must provide a response to each rule in **the workbook Exhibit E.1 (spreadsheet titled Inventory)**.

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7.2.43. General Requirements

Puerto Rico believes any Vital Records vendor can deliver a Core/base system that supports standard general functionality that works across all modules in the application.

The requirements below reflect rules that Puerto Rico believes are specific to their jurisdictional needs and must be provided as part of the application in addition to the application's standard/base functionality.

If you are unable to provide any of the following Puerto Rico specific requirements out of the box, please copy and paste the specific rule into **the workbook Exhibit E.2 (spreadsheet titled General)** and leave a comment explaining why. Unless stated otherwise, Puerto Rico expects all Puerto Rico specific rules to be included in the system.

There are also a series of Bonus general requirements. These requirements represent functionality that may exist in some systems and would be ideal but are not required for Puerto Rico's system. The proposer must provide a response to each Bonus requirement in Exhibit E.

7.2.44. General Puerto Rico Specific Business Rules

Application Administration	
GEN-1	A Jurisdiction Application Administrator role/profile can be established to deal with setting up, deleting, updating and unlocking user accounts. manage configuration, maintain the code and reference tables, imports, exports, and related functionality within the system. The role is the Jurisdiction only.
GEN-2	The system provides a Jurisdiction Application Administrator with the ability to designate an institution user administrator and at least one backup for each institution. The institution user administrator will be responsible for adding and removing users for their own institution.
Certificate Printing	
GEN-3	The system prints record data (ex. fields printed on issued certificates) in all upper case.
GEN-4	The standard issuance font, size, and format is Jurisdiction defined and configurable. For example, the system has a minimum issuance font size that is Jurisdiction defined to ensure very long names or facility names are legible.
GEN-5	The system stores signature image files (e.g., .jpg) for Jurisdiction officials that can be used when printing letters and certified copies. Signatures printed on certificates are Jurisdiction defined.
GEN-6	Regardless of the version of certificate in effect at the time the record was created, all short form certified copies will print in the same format (the most recent one adopted by Jurisdiction)
GEN-7	Electronically registered records are issued on the long form certificate format that was in use at the time of registration.
GEN-8	The format for printing the certificate is configurable by the Jurisdiction.
GEN-9	The system can support multiple certificates for all event types.
Configuration	
GEN-10	Control types such as dropdowns, radial buttons, and free text fields are configurable by the Jurisdiction.
GEN-11	Entries in a pre-defined list can be configured so that frequently used entries are at the top even if that is not the normal order alphabetically or numerically.
GEN-12	The system provides a data model configurable by the Jurisdiction that allows the addition of new fields to the database.
GEN-13	During an event year, new edits can be incorporated as needed but will only appear to records created after the date the new edits are implemented.

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Data, Data Formats and Tables	
GEN-14	The system includes all NCHS standard data elements.
GEN-15	The Jurisdiction has the option to keep data fields in the system even if they are dropped from the standard by NCHS.
GEN-16	The system can support multiple data formats (old versions as well as the current) for all event types.
GEN-17	The system can support screen layouts that differ based on the certificate and data formats for all event types.
GEN-18	The system maintains all lists in reference tables to ensure that the Jurisdiction can add, delete, or modify lists without programming.
GEN-19	All codes (for example: record status, marital status, ethnicity, fees, jurisdiction specific codes, etc.) used by the system are contained in tables.
GEN-20	The system automatically selects and stores the corresponding Jurisdiction or NCHS code or codes for specific literal values that are entered by a user.
GEN-21	During implementation some tables (i.e., user tables) can be populated from existing data sources such as a file from existing physician lists.
GEN-22	All names (first, middle, last, second last, generational ID) and address fields are parsed into individual fields.
GEN-23	There is no limit to the number of characters in any portion of the name.
GEN-24	The system provides functionality to allow the user to enter multiple aliases associated with a record.
GEN-25	The system includes the ability to store geocodes.
GEN-26	The system supports importing a file with geocodes and allows a user to manually enter a geocode.
GEN-27	Default values may be specific to a user role/profile or location. The use of default values is Jurisdiction defined and configurable.
GEN-28	Anytime a record is open, an authorized user can append notes that relate to the entire record. Record level notes are viewable to authorized users from all appropriate screens.
GEN-29	Who can edit or remove record level notes is set by role/profile and relationship to the note author (for example, self or supervisor).
GEN-30	Date formatting follows the NCHS standard and HL7/FHIR standard for transmission of YYYYMMDD.
GEN-31	Screens will display dates as mmddyyyy.
GEN-32	An event record includes literal values entered by system users and any subsequent codes derived from those literal values.
GEN-33	Amendments do not overwrite the original record. Changes made with amendments are captured with record history while the updated data are printed at issuance. Data prior to the amendment are available to be reinstated if an amendment is reversed.
Data Editing	
GEN-34	When processing amendments, the system prompts the user to attach the required documents. The system fires an edit message if the required evidence is not scanned and attached to the record.
GEN-35	The system performs single field, cross-field, and cross-page edits as defined by the Jurisdiction.
GEN-36	All fields involved in a cross-field or cross-page edit are displayed together so the user can see where the edit message was derived.

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GEN-37	Edit validation of the entire record for accuracy and completeness, following NCHS and Jurisdiction specified rules, is performed when the user indicates that the record is "complete."
GEN-38	Error messages generated by the system are clear, non-technical and provide information that is of real assistance to the user in correcting the error.
GEN-39	Fields are defined as numeric, alpha, alpha-numeric and hard edits ensure that the data entered in the field complies with the definition.
GEN-40	Edits can be defined as a "soft edits" which notify the user of a problem but do not force the error to be corrected. The user is allowed to proceed with the out-of-range value.
GEN-41	The results of the soft edit indicate the degree of verification. Soft edits may be "Edit passed.", "Edit failed, data queried and verified.", "Edit failed, data queried but not verified.", "Edit failed, review needed.", or "Edit failed, query needed.", or edit messages with equivalent meaning.
GEN-42	Some soft edits may be configured to require rekeying of the data.
GEN-43	If the rekeyed value is the same as the first, a flag is set to indicate that the rekeying confirmed the value to be accurate as far as the keyer knows. Rekeying of a value does not preclude out of range flags to be placed on the record.
GEN-44	For soft edits that do not trigger rekeying, the user can set the resolved flag in the record to indicate that they have been able to verify that the data that triggered the soft edit message is correct. The user can enter notes to explain the reason when a field that triggers a soft edit is verified as correct.
GEN-45	The system provides the user with a soft edit message on Jurisdiction-defined fields requesting that they enter a comment for the "unknown" value before proceeding. Soft edits for "unknown" values are defined by the Jurisdiction.
GEN-46	The system provides the user with the option to enter an explanation in a text field whenever a selectable list contains "unknown" or a similar value. The explanation field is available on Jurisdiction defined fields.
GEN-47	When appropriate, if the user selects "other," the user is guided to enter an associated literal explanation.
GEN-48	NCHS flags exist in the system to indicate overrides on specific data (e.g., soft edits), which indicates that the user has verified that the data has been validated.
GEN-49	Duplicate SSNs are allowed to exist in the converted legacy data and in new system data.
GEN-50	The system includes an English language spell check function and a spell check dictionary that incudes medical terminology. The spell check functions runs automatically behind the scenes and immediately notifies the user of misspellings. Authorized users at Puerto Rico can add words to the spell check dictionary.
GEN-51	The system includes a Spanish language spell check function. Spanish spell check with operate on Jurisdiction defined fields. Authorized users at Puerto Rico can add words to the spell check dictionary.
GEN-52	The system captures and logs the date/time and user ID on an override. The system allows a user to enter a text comment on the reason for the override.
GEN-53	When a flagged field has a relationship to another data field, the system highlights the fact that the related data must be completed. (For example, adding the "Deceased" flag on a birth record triggers a message that a Death Certificate Number should also be entered.)
Data Security	
GEN-54	The workstation computing platform does not store confidential data assets where it is not absolutely necessary to perform specific job-related duties.

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GEN-55	Confidential data assets which have been authorized to be stored on the local workstation are encrypted while stored on the workstation computing platform.
GEN-56	Some but not all Puerto Rico employees can be restricted from accessing EVRS from outside the Department of Health locations during specific periods of time in the day. Times of access are configurable.
GEN-57	If linked files are stored in system cache, the system refreshes the cached versions whenever necessary to ensure data integrity.
GEN-58	If data is stored in system cache, the cache clears at the end of each user session.
Electronic Signature	
GEN-59	The authentication process is augmented by displaying a confirmation message at the time of signing. An example of an acceptable message is: "By signing this information, I affirm under the penalty of perjury that I am the authorized (role) whose name will appear on this certificate".
GEN-60	A similar confirmation message is displayed when records that do not require an electronic signature are submitted for registration.
Event History and Request History	
GEN-61	The system maintains history of all changes to a registered record, such that at any time in the future, the information for the record can be retrieved and displayed accurately as of a point in time. The history log includes the initiating user, date started, date changed, user making the change, original value(s), and new value(s). The record history may be viewed by authorized uses directly from the event record.
GEN-62	The system maintains a history of all voided records.
GEN-63	The system maintains a history of all activities related to requests by form type (ex. Long form certification), including the number of times a document is printed, the number of copies printed, when printed and who ordered, and certificate numbers used.
GEN-64	The system provides the capability for an authorized user to view requests in different manners such as: 1) all requests, filled and open, on a particular record; 2) all requests made by a particular requestor; 3) all requests processed by a specific user; and 4) all certificates produced for a particular record.
Exports and Imports	
GEN-65	The format of the import or export is Jurisdiction defined and configurable. The system supports importing and exporting multiple file formats (i.e., text, Excel).
GEN-66	The system provides the ability for the Jurisdiction to configure new imports and exports as they become known.
GEN-67	Records that are imported are identified by source and date added.
GEN-68	When a record is selected for export the corresponding flag and date are updated in the extracted record.
GEN-69	The timing of an export can be scheduled to run at a specific time, either one time or on a recurring schedule. Scheduled exports are executed without manual intervention.
GEN-70	The system provides the ability to output data in Jurisdiction defined formats as necessary to meet a specific agency request.
GEN-71	Flag fields exist on records to inform the user whether the record has been included on a specific extract. There is one flag field on the record for each type of extract that is done. Each flag field is associated with the date when the record was extracted.
GEN-72	If the user determines that a given record has to be re-exported, the user can indicate in some way that it should be resent. Flags can be manually reset on individual records or reset for a series of records, such as a series of file

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	numbers or time frame. Resetting flags allows the record(s) to be included in the next export.
Facilities	
GEN-73	If the name of the institution is changed, the system deactivates the old facility name and applies the new facility name to records going forward from the date of the change based on Jurisdictionally defined rules. If the name of the institution is changed, the system does not change the facility name on registered records. Records are issued with the name of the facility at the time of registration.
GEN-74	An institution name change can occur without deactivating the users associated with the institution.
GEN-75	The Jurisdiction Facility Code does not change when a facility name changes.
GEN-76	If an institution changes ownership, records associated with the former facility are not automatically owned by the new facility. If an institution changes ownership and the new institution does not have ownership of the former facility's records, the records remain in the system as "orphans".
GEN-77	The system keeps a history of institution additions, deletions, and changes.
GEN-78	Institution records contain the NPI number.
File Numbers and Registration	
GEN-79	The format of the file number is Jurisdiction defined and unique by event type.
GEN-80	All sequence numbers start at 000001 at the beginning of every new data year and the sequence number is increased by one every time a file number is assigned.
GEN-81	Delayed records for birth and death are assigned the next file number in the sequence for the year that the event occurred.
GEN-82	Special indicators can be placed prior to the file number for special event records to differentiate event types. For example, for Presumptive Death the indicator could be "P" followed by the file number.
GEN-83	Reports of Foreign Birth are assigned a unique file number with Jurisdiction defined formatting and numbering. Foreign Births are not assigned an NFN.
GEN-84	A unique perpetual record ID number is assigned to each new event record that functions as an internal control mechanism within the system. This record ID is visible to users based on role/profile.
Integration and Interoperability	
GEN-85	The system includes an interface with EVVE that meets all the specifications as prescribed by NAPHSIS and includes the fact of death query. The interface between the system and EVVE is automated requiring no manual intervention.
GEN-86	The system interfaces with the STEVE thin client and/or API to automatically send and receive files to share data between STEVE and the EVRS.
GEN-87	The system includes an interface for FHIR that meets all the specifications as prescribed by NAPHSIS and NCHS. The FHIR interface is automated requiring no manual intervention. Responses received by the system are stored on the appropriate record, including codes returned by NCHS.
GEN-88	The system includes the ability to import VitalChek requests so that they can be processed as if they were entered directly into the system.
GEN-89	Legacy images are linked to records at the time of EVRS implementation and additional images can be linked to records at any time after implementation.

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GEN-90	When a record is displayed that has scanned documents attached, the screen contains an alert to the user that images exist, provided the user/role has the appropriate permissions to view the alert.
GEN-91	The system supports interoperability with data systems containing auxiliary data needed for vital records (such as EHR/EMR, funeral director systems, coroner/ME systems).
Legacy Data	
GEN-92	During data conversion/migration one or more legacy data indicators can be set based on the specific Puerto Rico-defined criteria, for example missing file date, missing sex, truncated names, missing middle name, xxx in a field.
GEN-93	The existence of a legacy data indicator can control whether certain edit messages fire.
GEN-94	The existence of legacy data indicators can control actions in the system, for example, whether issuance can occur from the electronic record or if correcting (completing/backfilling) the record is required.
Letters and Forms	
GEN-95	Multiple letter templates can be Jurisdiction configured.
GEN-96	Multiple form templates can be Jurisdiction configured.
GEN-97	Letters generated through the system can be distributed via means other than postal mail (e.g., system messaging, email)
GEN-98	Letters and other correspondence are stored with the relevant record so that the exact output can be retrieved even if it contains custom language.
GEN-99	The user can print a letter, form and/or labels on demand or in a batch.
GEN-100	The system maintains a history of all documents printed. An authorized user can print the full history of a record including the original record and all changes/amendments associated with the record.
Messaging	
GEN-101	Standard messages can be automatically created and sent by the system notifying a user to take a specific action. Wording of standard messages can be changed by the Jurisdiction Configuration Manager.
Online Help	
GEN-102	The system provides screen and field-level help that can be accessed from all screens. Depending on the nature of the screen, help provides both information for the user and more technical information for the Application Administrator. Help content includes navigation instructions, screen-sensitive conceptual overview, and step-by-step instructions for entering and managing data. The system allows the Jurisdiction to incorporate multi-media training materials into the help system.
GEN-103	The resources and support menus contain the ability to link to multiple online resources. Examples of system links include: ▪ Online death registration manual (possibly in both HTML and PDF) ▪ Statutes and regulations pertaining to death registration ▪ External resources such as NCHS, NAME (National Association of Medical Examiners) ▪ YouTube videos on death certificate instructions
GEN-104	The links contained in the resources and support menu are hyperlinks and display in a way that does not interfere with the core session operations.
GEN-105	The system includes a method of storing frequently asked questions (FAQ) for user access. Authorized users at the Jurisdiction have full rights, including add and edit rights to the FAQ repository.
GEN-106	All help content and resources are managed by the Jurisdiction Configuration Manager.
GEN-107	Help text or links to multimedia modified by the Jurisdiction are not overwritten on subsequent software upgrades.

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GEN-108	Online screen-level help is available in Spanish.
Printers	
GEN-109	The system allows the user to access and print forms and other documents multiple times.
GEN-110	All printed outputs for a specified user and transaction are packaged together and sent as a unit to the printer so that all outputs print together without interleaving documents from other users.
Queues	
GEN-111	The system includes multiple queues, each with a unique purpose. Each queue displays the number of records within the queue assigned to the logged in user.
GEN-112	Multiple authorized users may access the same queue simultaneously without being locked out. For example, the "submit for registration with exceptions" queue can be accessed by all registration users for that event.
GEN-113	As records are processed through the system they are moved automatically from queue to queue, or out of queues.
GEN-114	All records in a queue can be viewed by a user, either on a continuous screen or with pagination.
Record Access/Ownership	
GEN-115	Ownership is determined by the combination of role/profile and institutional affiliation.
GEN-116	Individuals with the same role/profile and institutional affiliation can access the same records. For example, any birth clerk within the specified institution can access a record if owned by the role/profile of "birth clerk."
GEN-117	Different sections of a single record may have different owners. Each section of the record can only have one "role/profile" owner at a time. For example, if the owner of the demographic section of a death certificate is set to the funeral director(s) at xyz funeral home, anyone with the role/profile of funeral director at xyz, and only those individuals, can enter/modify data in demographic section as an external user.
GEN-118	The owner of a section of a record can transfer their ownership of that section to another user. Transfers are not necessary between users with the same role within the institution. When a record is transferred the ownership fields in the record are updated but history maintains a record of all owners who were assigned to the record at any time.
GEN-119	In the case where section owners in a record are different, both sections of the record may be accessed and edited at the same time (i.e., medical and demographic).
GEN-120	Once submitted for registration, the ownership information for each section is maintained but the record is no longer available for editing by the owner.
GEN-121	To account for the possibility of ownership conflict, the Jurisdiction can change the ownership of any record.
GEN-122	Local offices have the ability to view all vital event records regardless of the municipality of occurrence.
GEN-123	Local offices may issue records for events that were registered throughout the Jurisdiction.
GEN-124	The system provides the ability to turn on and off the feature that allows any local office to access any record.
GEN-125	The system provides the ability to turn on and off the feature that allows a specific Local office to access any record.
GEN-126	The Central Office has the ability to specify which event types and certificate types each Local Office may issue.

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GEN-127	The system restricts end users (ex. facility staff, funeral director) from accessing records after a certain time period. End users may only records for one year after the registration date.
GEN-128	End users associated with Forensics are not restricted to access records within one year of registration.
GEN-129	End users cannot access registered migrated records. Unregistered records that are migrated will be accessible depending on the data cutover date for end users.
Record Status, Alerts and Flags	
GEN-130	The record status allows the record to move through the workflow. Statuses are behind the scenes and may or may be not visible to the user. Statuses automatically update as the record moves through the workflow.
GEN-131	Flags exist based on status, special conditions (i.e., do not issue) or data movement (i.e., reflag for export), on records. Flags may be accompanied by an alert. Standard flags are based on NAPHSIS use case models, NCHS specifications, and additional flags can be Jurisdictionally defined. Flags are table driven.
GEN-132	Alerts are a visual indicator of a flag on a record. Alerts appear to the user upon opening a record or request and require the user to take an action to continue with their intended work. Alerts may be in the form of a pop-up message. Alerts may be role/profile based.
GEN-133	An indicator is a visual cue of a special condition on a record that could be temporary or permanent with the intention to prevent staff from overlooking the status, purpose or condition of the record (i.e., visual indication that a record is delayed, record has a do not issue flag). Indicators are Jurisdictionally defined.
GEN-134	When the condition causing an automatic alert has been resolved, the alert flag is removed automatically. (For example, if the missing child alert is set based on processing an import file, the alert will also be removed by the system if the next import does not include the same child.)
GEN-135	Alerts, flags, and indicators are Jurisdictionally defined. The record can have multiples. They can be automatically assigned or removed by the system or by a user.
GEN-136	In some cases, an authorized user can override flags such as one to prevent printing when amendments are in process.
Reports	
GEN-137	The system allows the user to run reports by Jurisdiction-defined fields.
GEN-138	The system includes an ad hoc reporting tool for authorized users to create reports.
GEN-139	All reports (standard and ad hoc) can be easily modified by the Jurisdiction.
GEN-140	Reports have common formatting such as standardized headers, footers, and date and page designations.
GEN-141	At the time the report is run, filters allow users to select the records to include in the specific report.
GEN-142	All reports (standard and ad hoc) can be printed to an electronic file in Excel format, PDF, text format or other format provided in the system, with the user able to select the output type.
GEN-143	The filter criteria for all reports (standard or ad hoc) can be maintained by the Jurisdiction Configuration Manager.
GEN-144	The sort criteria on all reports (standard and ad hoc) can be maintained by the Jurisdiction Configuration Manager.

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GEN-145	The system provides authorized users with a program to create new standard reports. Reports modified or created by the Jurisdiction are not overwritten on subsequent software upgrades.
GEN-146	Users of the reporting function are prevented from including records for which they do not have authority.
Roles, Profiles and Institutional Affiliations	
GEN-147	Roles and profiles are assigned to users before they can access the system. The user's access is controlled by the role/profile that was assigned by the Application Administrator.
GEN-148	Assignment of a role/profile to an individual user include a date upon which the role becomes active and a date upon which the role becomes inactive. The begin date can be auto populated with the current date. The inactive date is not mandatory.
GEN-149	Roles and profiles may be modified to take into account any Jurisdiction specific user roles and profiles.
GEN-150	Once a user account has been established and affiliated with one institution, they may be affiliated with additional institutions (regardless of institution type) without needing to establish a separate user ID and password.
GEN-151	If the user is associated with more than one institution, the user is provided with a list from which to select the institution when they log on.
GEN-152	After a user who is affiliated with multiple institutions is signed on, the user has a quick way of changing to a new location without signing out of the system. Once the user switches their location (ex. acting as embalmer instead of funeral director), their privileges change to reflect their role/profile in the new location.
GEN-153	If a user is associated with multiple institutions, the user can be deactivated for one or multiple institutions.
GEN-154	Users who have been inactive for a Jurisdiction defined period of time are automatically deactivated.
GEN-155	Only the Jurisdiction Application Administrator can reactivate a deactivated user account regardless of location.
Searching	
GEN-156	Search parameters are configurable by the Jurisdiction Configuration Manager.
GEN-157	Search criteria are dependent upon the user role/profile authorization rights and in the context of the usage. (For example, the search criteria for an employee of a funeral establishment are different than those of a Jurisdiction user. Searches to start a record are sometimes different from general queries.)
GEN-158	When starting a record, the search checks all records regardless of institution and status to ensure that a duplicate record is not created.
GEN-159	Searches consider hyphens and apostrophes, but disregard special characters. For example, accents over vowels, like "diéresis" (ú) and "tildes" (Ñ), are disregarded for searches.
GEN-160	The display that results from a search at an institution is limited to those records associated with the institution conducting the search.
GEN-161	The system allows searches for exact matches and supports use of wild cards.
GEN-162	When appropriate, the system displays a message indicating that the search is complete and no matches were found.
GEN-163	The results of the search are returned in a list that include Jurisdiction defined fields.
GEN-164	The user is able to sort the results of a search into different orders by clicking on the column headings.

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GEN-165	The system allows the user to cancel a search request.
GEN-166	When a search list is displayed, the status of the record is displayed on the list.
GEN-167	Once the search is complete and the results are displayed, the system provides the user with an option to search again.
Security	
GEN-168	Vendor ensures all network traffic is encrypted during transfer.
GEN-169	The system does not use proprietary encryption techniques.
GEN-170	The system uses AES 256 or higher encryption.
GEN-171	The system allows data within the database to be encrypted at rest.
GEN-172	The system encrypts the connection between the application and database.
GEN-173	The standard for exchange of data within the system is a secure hypertext transport protocol or https.
GEN-174	Even though the Jurisdiction Vital Records and Statistics function is HIPAA exempt, security rules need to be robust enough to protect the data as described by HIPAA requirements.
GEN-175	The software can pass industry standard vulnerability scans prior to being installed in a production environment.
Specific Exports and Imports	
GEN-176	The system can import geocoded values for records for any event type that update the appropriate records in the system.
System Documentation	
GEN-177	Documentation is available online.
GEN-178	Documentation is specific to Puerto Rico's configuration and available in both English and Spanish.
GEN-179	End User Guides include an overview of system functionality, explanations of menu options, screen flows, field definitions and user instructions by role. Documentation also describes each standard report and explains all edits/validation checks.
GEN-180	The documentation includes a User Quick Reference Guide by role.
GEN-181	The documentation includes a System Administrator Guide. The System Administrator Guide includes instructions for all administrative functions (e.g., user management, password management, role/profile management, troubleshooting, examples, common issues, known issues, etc.), all configuration functions (e.g., changing screens, adding fields, changing edits, updating tables, etc.), and information on system messaging including how to change messages.
GEN-182	The Report Writer Guide includes guidelines for how to create new reports and make changes to reports and forms that the Jurisdiction can maintain.
GEN-183	The vendor provides technical documentation to the Jurisdiction to aid in supporting the application and databases hosted on the state cloud. The technical documentation includes an overview and operating instructions for all interfaces, and provides a high-level system architecture diagram, including recommended and minimum hardware and software specifications. Documentation contains explicit instructions on security mechanisms by role/profile and a troubleshooting guide.
Technical Specifications	
GEN-184	Virtual connections to the database are defined so that the Jurisdiction can migrate to a different database without needing to change application code.
GEN-185	The system is scalable to support the Vital Records/Statistics needs for the next 10 years, based on the anticipated number of transactions at an annual growth rate of 10%.

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GEN-186	The system is maintained and updated to allow the Jurisdiction to upgrade system software to current levels.
GEN-187	Normal day-to-day operational downtime for system patches, applying new releases or other routine activities should be scheduled for non-peak hours as described by management.
GEN-188	The system allows for the database to be hosted on the Jurisdiction cloud by the Jurisdiction.
GEN-189	The system allows the ability to replicate data to offsite back-up systems using standard database features and functions, i.e., not proprietary.
GEN-190	All data is owned by the Jurisdiction, regardless of the cloud or physical environment where it is stored. The vendor cannot share Jurisdiction data.
GEN-191	The system allows for transaction logging so that in the event of failure the system can be recovered using the last backup (including any incremental backup and transactional logs) to the point of failure using standard DB features and functions, i.e., not proprietary. The system supports daily backup.
GEN-192	The system automatically balances the load of user activity among the servers to ensure the most efficient processing time possible. If one server ceases to function the system seamlessly moves users to another back-up server without interrupting transaction activity.
GEN-193	The system is accessed via the Internet. The system is browser agnostic (accessible via Edge, Chrome, Firefox, Safari).
User Authentication	
GEN-194	The format of the user ID and password is Jurisdiction-defined.
GEN-195	Only the Jurisdiction System Administrator can unlock a user ID regardless of location.
GEN-196	Authentication to the system for both internal and external users is encrypted.
GEN-197	The system allows setup of two-factor authentication.
GEN-198	A default password is generated when a new user account is established. The system requires users to change their default password on the first log on.
GEN-199	A user's password is not available to anyone else including the Jurisdiction System Administrator.
GEN-200	The System Administrator can reset a password and force the user to establish a new password at next logon.
GEN-201	At logon, the system includes an option for users to request a password reset if the user forgot their password.
GEN-202	User passwords expire on a Jurisdiction defined schedule. The system notifies a user ahead of time that the password is expiring based on a Jurisdiction defined schedule.
GEN-203	The log on screen includes an option for the user to change their password. The system directs the user to update their email and phone number whenever the password is changed.
GEN-204	The number of times a user can attempt to logon before locking the account can be configured by the Jurisdiction.
User Interface	
GEN-205	The home page is branded with the Jurisdiction Vital Records information and the system displays the Jurisdiction approved log on banner before the user logs into the system.
GEN-206	The system protects a user from losing data entered on one tab if they move to another tab on the same record.
GEN-207	Users can begin typing the correct selection in a drop down field and the list is repositioned as the letters are typed until the correct item is displayed (i.e., predictive text).

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GEN-208	The system will ask the user if the record should be saved prior to exiting (including closing the browser) if the SAVE action has not already been taken.
GEN-209	The system provides a quick way to save an incomplete record as pending without having to display all error messages associated with the record.
GEN-210	All data entry appears in upper case throughout the system and events.
GEN-211	If the zip code crosses multiple municipalities, the system accepts the municipality as provided by the user. Zip codes do not drive municipality tables.
User Audit Logging	
GEN-212	The system maintains a history of all logons for a Jurisdictionally defined period of time.
GEN-213	The log function includes the ability to log record access even if no action was taken.
GEN-214	The user auditing data is maintained for the life of the record.
Voids and Abandonment	
GEN-215	The system provides an authorized user with a function to void a registered record. The system requires the user to enter a reason for voiding and take a positive action to confirm that s/he wishes to void the record before the void is processed.
GEN-216	The system prevents printing of a certified copy after the record is voided.
GEN-217	An authorized user can "unvoid" a record after it has been voided. Unvoiding reinstates the record as a current, active record that can be amended, corrected, and sent to data partners as needed.
GEN-218	The user can abandon an unregistered record on demand.
GEN-219	The timeframe for determining when an active, unregistered record is considered to be abandoned is Jurisdiction defined and configurable. All records that meet the timeframe are queued for the Jurisdiction to review and take a determinate action on, such as abandoning the record or maintaining the record in a pending status.
Workstation Technical Setup	
GEN-220	The system supports the use of mobile devices (for example, for funeral home signing, medical certification or a nurse completing the mother's worksheet.)
GEN-221	The system has the ability to accept scanned documentation and link to event records and requests.
GEN-222	The system provides a notification or alert of latency issues directed automatically to the system administrator with Vital Records. Latency is defined as more than a 10 second delay in screens loading.
GEN-223	Session timeout is Jurisdiction-defined.
GEN-224	The time when the timeout warning message fires is Jurisdiction-defined.

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7.3. Attachment C: Puerto Rico "To Be" Process Flows

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New User Setup

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Death Overview – Who Can Do What

March 6, 2023

Death Users

1.
Minimum Info to Create Record

- Medical Certifier

- Facility

- Forensics

2.
Cremation Approval

- Forensics

3.
Demographic Information

- Funeral Home

- Forensics

- Donations Board

4.
Medical Information

- Medical Certifier

- Forensics

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Start Death Record at a Facility
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Medical Certifier Starts Death Record (pg. 1)

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Medical Certifier Starts Death Record (pg. 2)

March 6, 2023

EVRS

a → 14. Queue Record for Funeral Home

14a. EVRS generates Transit Permit

Facility User

15. Print Transit Permit, release body to Funeral Home

Funeral Home

Go to Death Record at a Funeral Home Flow

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Death Record at a Funeral Home

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Forensics Starts Death Record

May 3, 2023

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Death at a Nursing Home

May 3, 2023

Funeral Home

1. Submit documents to Forensics for review

5. Funeral Home updates and prints transit permit

6. Funeral Home transports body

END

Forensics - Pathologist

2. Forensics reviews documents to determine if need to see body

3. See body? — Yes / No

4. Enter ENV number into record

Continue with Death at a FH

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Cremation Approval Request

May 3, 2023

Funeral Home

1. Create cremation request from record

EVRS

2a. Request queued in "cremation approval pending queue"

2b. Email Forensics of pending cremation approval

Forensics - Pathologist

3. Select record from queue and review COD

4. OK?

— No → Go to Cremation Rejection

— Yes → 5. Enter Forensics cremation number on death record

6a. PIN approval of cremation request

6b. Cremation approval populated with Forensics e-signature

Continue with Death at a FH

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Cremation Rejection

May 3, 2023

Forensics – Pathologist

1.
Reject request, enter PIN and comments

2.
Take over case?

Yes →

No ↓

3.
Take over death record in EVRS

Go to Forensics Starts Death Record (step 8)

EVRS

4a.
Message Funeral Home to notify reason for rejection

4b.
Record queued in Medical Certifier "unresolved" queue

5.
Notify medical certifier of COD errors to correct

Medical Certifier

6.
De-certify record, update COD, re-certify record

Go to Cremation Approval Request

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Forensics John Doe

March 6, 2023

Forensics - Administrator

1. Forensics completes demographic information
2. Claimed? — Yes → 3. Select Funeral Home → 4. Generate transit permit → 5. Release body
No → 7. Donation? — No → 12. Cremation
6. Submit for registration → END

EVRS

13. Queue for Pathologist

Forensics - Pathologist

14. Pathologist reviews and approves cremation

Forensics - Interviewer

15. Generate Cremation (no cost) & Transit Permit → 16. Release body for cremation

Donations Board

8. Donations Board examines body → 9. Accept? — Yes → 10. Generate Transit Permit → 11. Donation Board picks up body
No

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Drop to Paper

November 30, 2023

Facility Staff

1. Starts death record in the EVRS

3. Prints medical abstract from record in EVRS

Medical Certifier

2. Completes COD and signs medical information

Funeral Home

4. Picks up body and medical abstract

5. Collects demo information on informant worksheet

6. Takes medical abstract and informant worksheet to local office

Local Office Staff

7. Locates and opens record from paperwork

8. Data enters demographic information

9. Submits record for review and approval

EVRS

10. Record queued for review at the Central Office

Central Office Registration

11. Approves and registers record

END

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Birth-Death Cross Match (linkage)

March 6, 2023

EVRS

1. The Death Record is registered

2. Birth Death Cross-Match runs automatically

3. Match? — Yes → 4. Automatically link and mark Records

No

6. Probability Match? — Yes → 8. Queue Records for review

No → 7. Record remains in database for future Cross-Matching → End

5. Update selected fields on Birth Record and Death Record → End

13. Automatically link and mark Records through system

Central Office Registration Supervisor

9. Accept Match? — Yes

No → 10. Place in pending queue → 11. Research & resolve → 12. Match found? — No → 14. Remove from queue

Yes

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Maternal Death Linkage

November 30, 2023

EVRS

1. Death record is registered

2. Maternal death linkage runs automatically if criteria are met

3. Match?
- Yes → 4. Automatically link and mark records
- No →

5. Update selected fields on Birth / Fetal Death and Death records → END

END

6. Probability match?
- No → 7. Record remains in database for future linkage → END
- Yes → 8. Queue records for review

13. Automatically link and mark records through system

Central Office Registration Supervisor

9. Accept match?
- Yes → 13. Automatically link and mark records through system
- No → 10. Place in pending queue

10. Place in pending queue → 11. Research & resolve → 12. Match found?
- Yes → 13. Automatically link and mark records through system
- No → 14. Remove from queue → END

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Record a Birth, Fetal Death, or Death of a Puerto Rico Resident in Another State

May 4, 2023

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Data Extract

May 4, 2023

EVRS

1. Record registered and flagged for export

2a. Record exported in FHIR message format

STEVE

2b. Record sent via FHIR

2c. Record flagged as sent

9. Data sent to business partners

End

7. Record coding imported into EVRS

8. Update Database with coding

6. Receive record coding from NCHS via FHIR

STEVE

3. Receive and parse data

4. NCHS?

No

Yes

NCHS

5. Process FHIR messages

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Point of Sale: Counter Orders

May 4, 2023

Customer

1. Customer presents paper application, payment, proof of eligibility, and ID

Central or Local Issuance

2. User creates application and request in EVRS and uploads supporting documents

3. Central or local office checks eligibility

4. Eligible?

No → 5. Print rejection letter → END

Yes → 6. Payment receipted in EVRS

8. Print receipt, if desired

Go to Issuance: Fulfillment Flow

EVRS

7. System generates invoice, if desired

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Point of Sale: Mail Orders

May 5, 2023

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Point of Sale: VitalChek Orders

March 6, 2023

Customer

1.
Customer submits application, payment, proof of eligibility, and ID with VitalChek

VitalChek

2.
Order is uploaded to VitalChek server

Central Office Issuance

3.
Extract orders from VitalChek and upload to EVRS

4.
Electronic Funds Transfer (EFT) and print receipt

Go to Issuance: Fulfillment Flow

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Point of Sale: Issuance Fulfillment

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Point of Sale: Accounting

March 6, 2023

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Point of Sale: Government Search Invoicing

March 6, 2023

Customer

1. Government agency user logs into EVRS

2. Opens event module (Birth, Death, Marriage)

3. Searches for record

4a. Opens / previews record

4b. EVRS captures date/time of preview by user

5. Continue searching

7. Government agency remits payment

a

EVRS

Finance

6. End of month, Finance generates invoice

a

8. Finance marks invoice paid, adds payment details

9. Runs monthly reconciliation

10. Notifies government agency of remaining funds

END

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Security Paper Order, Distribution & Reconciliation (pg. 1)

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Security Paper Order, Distribution & Reconciliation (pg. 2)

March 6, 2023

EVRS

b → 17. Queue for approval and allocation

20. Inventory update as used by individual user (issuance)

Administrator

18. Allocate paper to office

24. Enter adjustments into EVRS → End

Central or Local Supervisor

19. Allocate paper to staff

21. Print inventory report on periodic basis

22. Reconcile inventory

23. Communicate discrepancies

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Birth at a Facility (pg. 1)

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Birth at a Facility (pg. 2)

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Safe Haven/Foundling Birth

May 22, 2023

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Home Birth

May 9, 2023

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Delayed Birth — May 9, 2023

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Voluntary Acknowledgement of Parentage at Facility

May 9, 2023

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Processing Voluntary Acknowledgement at the Central Office

May 11, 2023

Central / Local Issuance Staff

1a. Receive acknowledgement through walk-in

Central Office Amendments Staff

1b. Receive acknowledgement through mail

2. Review

3. Add or change parent listed?

— Change →

5. Court Order to remove?

— No → Reject request

— Add ↓

4. Initiate amendment to process acknowledgement

— Yes ↓

6. Scan and attach Court Order to Record

7. Update information on Birth Record

8. Update child's surname (if requested)

Go to Issuance Flow

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Birth and Fetal Death Registration

May 19, 2023

EVRS

1. Record queued for review

a

Go to Post Reg. Process for Birth and Death Records

Central Office Registration

2. Registration user logs into EVRS

3. Select queue to work from

4. Review record and exceptions

5. Accept record?

Yes

6. Release record and National File Number is applied

No

8. Central Office registration user makes administrative correction

Yes

7. Can Central Office fix?

No

9. Reject record with message about errors

Original Author

10. Access record from rejected queue and fix

a

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Annotations (pg. 1)

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Annotations (pg. 2)

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Post Registration Process for Vital Records

May 11, 2023

EVRS

1.
Record has been
registered

2.
Records available
for Issuance,
Amendments and
Birth/Death Cross
Match

3.
Record included
in NCHS
transmission
(new and
changed)

6.
SSA transmission
(Birth and Death)

8.
Scheduled and
ad hoc reporting

9.
QA registered
records

10.
Send/receive
imports and
extracts

4.
Receive error
report

7.
Update EVRS with
SSN information

5.
Correct errors in
EVRS

End | End | End | End | End | End

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Post Registration Query Cycle

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EVRS User Creates an Amendment

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Amend a Registered Record

May 11, 2023

Central Office Amendments Staff

1a. Search for record to amend

1b. Access amendment queue

2. EVRS record?

3a. Create amendment on a record and add supporting docs

3b. Review amendment request and supporting docs

4. Can process?

5. Rejection and Correction Cycle

6. Approve amendment

7. From EVRS User?

Continue with EVRS User Creates Amendment

Vault

Go to Back Data Entry

9b. Print amendment report

END

EVRS

8. System updates record and seals original record, if necessary

9a. Record queued for issuance at local or Central Office

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Back Data Entry

March 6, 2023

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Marriage (pg. 1)

June 2, 2023

Customer

1. Customer requests marriage license at Local office

3. Get lab tests completed and certified

5. Submit documentation and make payment in Renovaciones

4. Apply online or in person? — Online

a

Local Office

2. Explain steps and necessary documents

In person

6. Applicants apply for license in person at a local office

7. Create request and receipt payment

11. Print certificate from EVRS

10a. Applicants and Local Office staff sign

10. Issue license

9. Reject with instructions — No — 8. Application complete? — Yes

END

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Marriage (pg. 2)

June 2, 2023

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Divorce

May 25, 2023

Notary Public

1a. Notary public starts divorce (Mutual Consent or Irreconcilable differences only)

2a. Notary public submits public deed and forms

Court

1b. Court issues divorce decree

2b. Court or a spouse submits divorce decree

Central Office

3. Searches for marriage record

Marriage outside PR

Divorce outside PR

Marriage and Divorce within PR

4a. Capture for statistics only

END

4b. Obtain certification from executor at courthouse

4c. Annotate divorce on marriage record (County/State and date of decree, court order # if applicable)

END

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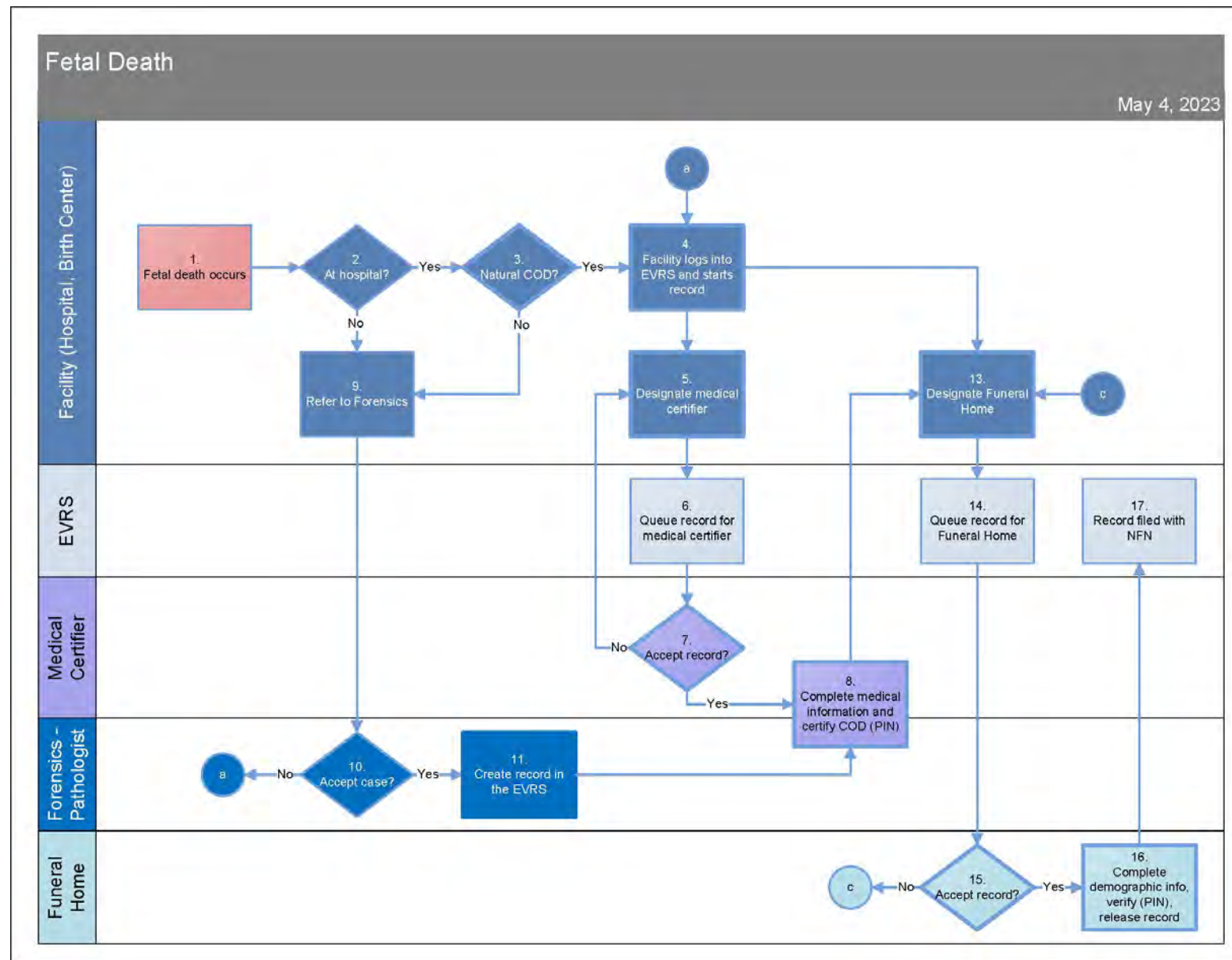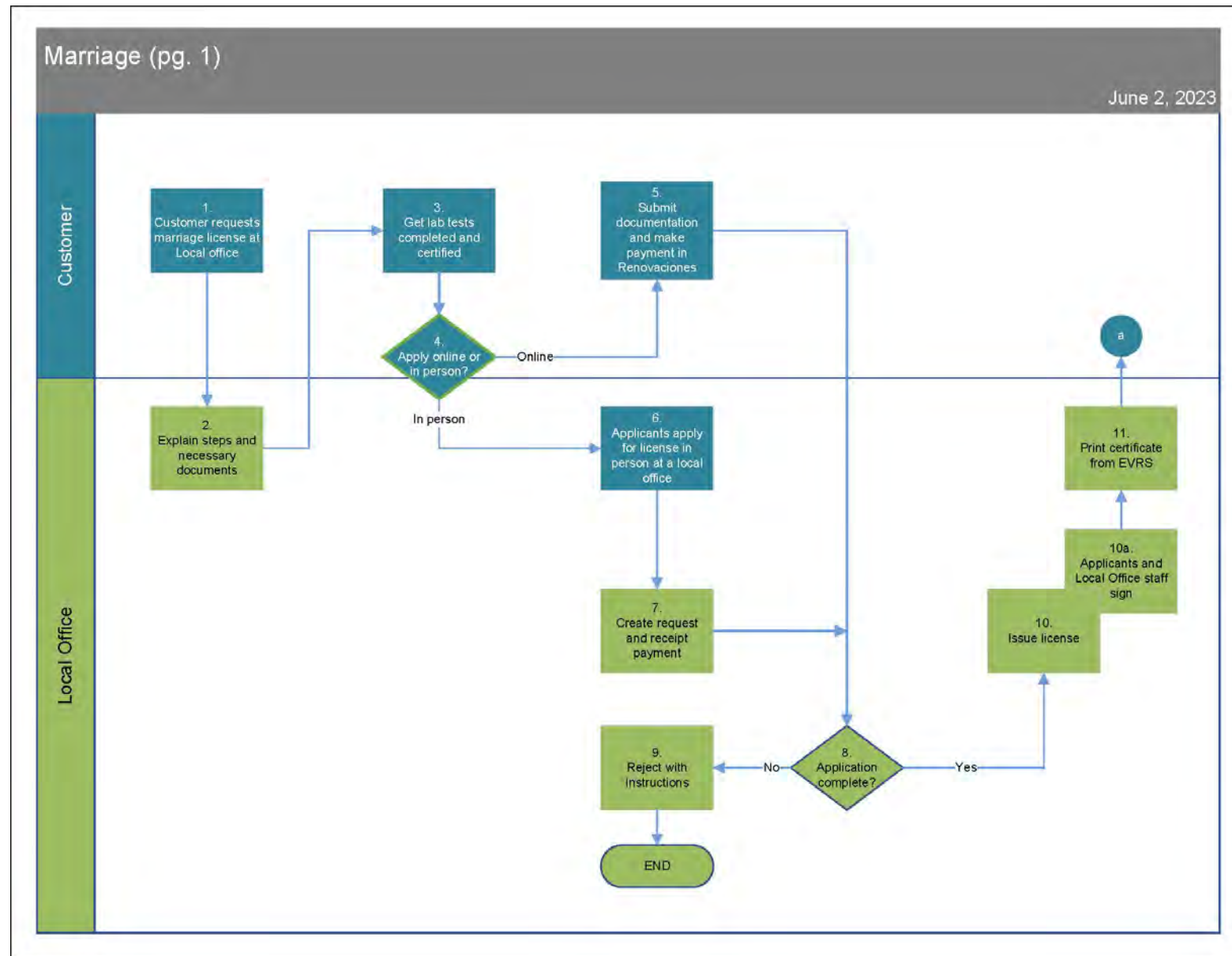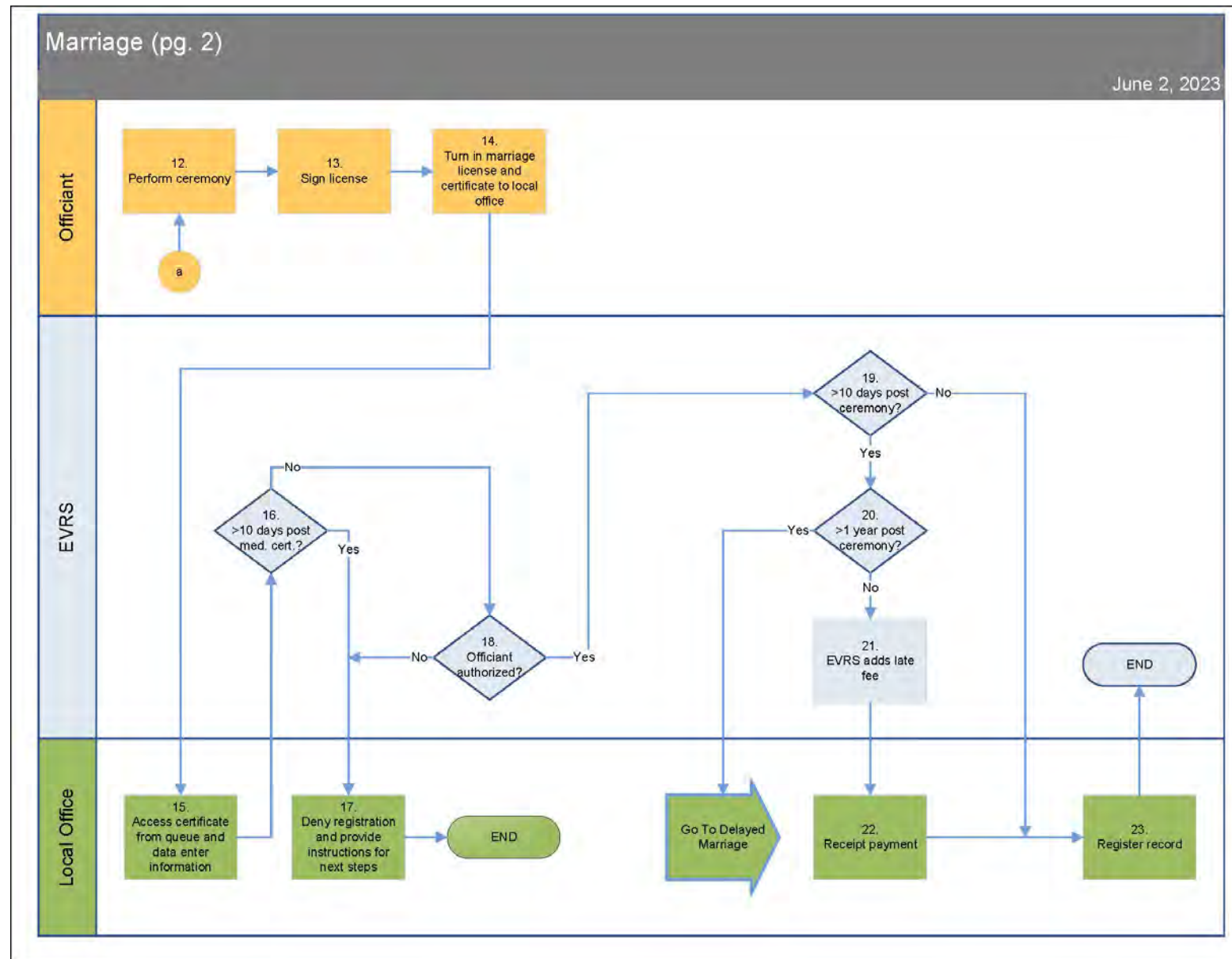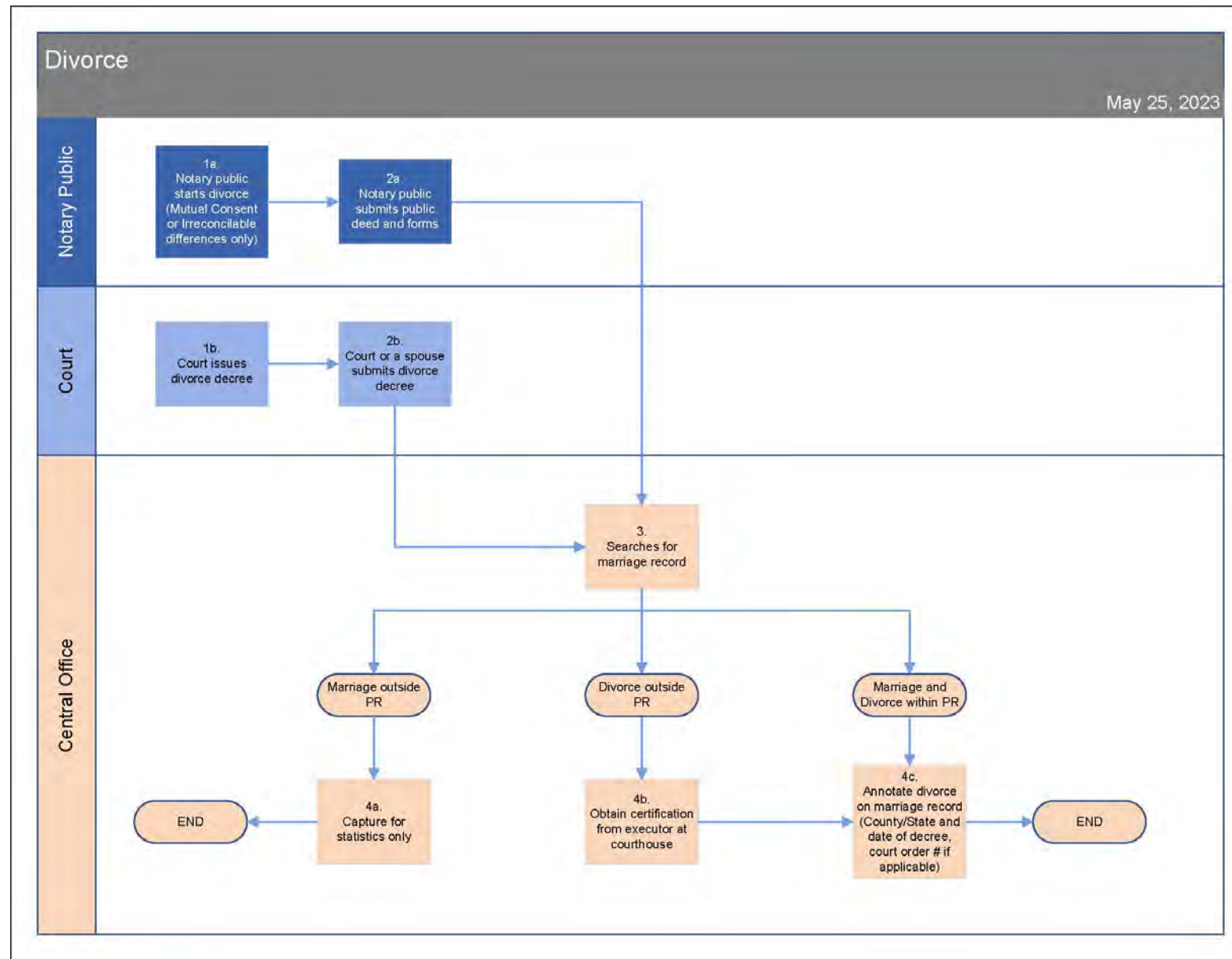Demographic Registry of the Puerto Rico Department of Health

7.4 Attachment D: Puerto Rico Forms, Reports, and Exports

Puerto Rico believes any Vital Records vendor can deliver a Core/base system that supports standard general functionality, including providing all necessary forms and certificates, reports, exports, and imports for all modules in the application.

The requirements below reflect system outputs that Puerto Rico believes are specific to their jurisdictional needs and must be provided as part of the application in addition to the application's standard/base functionality.

If you are unable to provide any of the following Puerto Rico specific outputs, please copy and paste the specific rule into **the workbook Exhibit E.3 (spreadsheet titled Forms and Reports)** and leave a comment explaining why. Unless stated otherwise, Puerto Rico expects all Puerto Rico specific outputs to be included in the system.

There are also a series of Bonus outputs. These outputs represent items that may exist in some systems and would be ideal but are not required for Puerto Rico's system. The proposer must provide a response to each Bonus item in Exhibit E.

System Reports	
FR1	A listing of registered users by type of user (funeral home user, medical certifier, Jurisdiction employee, etc.) and the organization they are affiliated with, showing titles, levels of access, and frequency of use. Produced monthly or on demand by the application administrator. (NAPHSIS Report 39.0).
FR2	A report of all changes on a specific record, since record inception. This report may be viewed on screen or printed.
FR3	Audit log of any changes to a record sorted by year and NFN. This report may be viewed on the screen or printed.
Death Record Outputs	
FORMS and CERTIFICATES	
FR4	A form generated from a death record used for investigation purposes. The form is Jurisdiction defined and prints on white paper.
FR5	A form generated from a death record for burial or entombment. Fields are user defined. The form includes the associated record's file date and NFN, as well as a unique number. The unique number is different for each disposition method. Numbers begin at 1 each new year.
FR6	A form generated from a death record for cremations. Fields are user defined. The form includes the associated record's file date and NFN, as well as a unique number. The unique number is different for each disposition method. Numbers begin at 1 each new year.
FR7	A form generated from a death record for removal from the Jurisdiction. Fields are user defined. The form includes the associated record's file date and NFN, as well as a unique number. The unique number is different for each disposition method. Numbers begin at 1 each new year.
FR8	A form that includes all demographic and medical information captured on the record at the time of printing. Fields are user defined. The form contains a watermark "OFFICE COPY - NOT FOR OFFICIAL USE". The form can be printed by multiple end users (ex. medical certifier, funeral director) as defined by user role.
FR9	A death short form (abstract) is a system form with data populated from a death record. The format and fields are Jurisdiction defined.
FR10	Print a long form full certified death certificate including all medical information, Jurisdiction defined fields, and with signatures.
FR11	Print the form "Delayed Certificate of Death" on demand for a specific case. This is a Jurisdiction defined form.
FR12	Print the form "Presumptive" on demand for a specific case. Abstracted information entered in the record prints on the certified copy of the death record. This form is Jurisdiction defined.

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FR13	A form generated from a death record for transporting of bodies. Fields are user defined and includes a field to capture the name of the next of kin or individual who authorized release of body. The Transit Permit has a unique number assigned by the system. These numbers are different from the record and Jurisdiction file numbers. The format is Jurisdiction defined. The sequence for the Transit Permit number is reset at the beginning of the year.
FR14	A Jurisdiction defined form that may be printed in order to collect death data from the informant. The form can be printed in English or Spanish.
FR15	The funeral home may print a report of a death record to be used to verify the information collected from the informant. This report includes all demographic information about the decedent as it was entered onto the death record and provides a place for the informant to sign acknowledging that the information on the form is accurate. This form is Jurisdiction defined and contains a watermark such as "Not a Legal Copy" or "For Demographic Verification Only". The form can be printed in English or Spanish.
FR16	A Jurisdiction defined form that includes minimal demographic information and all medical information about a decedent.
FR17	A Jurisdiction defined abstract of a single death record for a non-Puerto Rico resident. This may be printed from the system to report death to decedent's Jurisdiction of residence. The form clearly states this is an out of state record and cannot be used for official purposes. The layout is Jurisdiction defined.
LETTERS	
FR18	A Jurisdiction defined letter that users can edit and print which provides instructions for completing a death certificate.
FR19	A Jurisdiction defined letter that users can edit asking for clarification on missing information on a death record. The content can be sent to a user as a system message.
FR20	A Jurisdiction defined query letter that users can edit requesting clarification on Cause of Death information. The content can be sent to a user as a system message.
FR21	A Jurisdiction defined letter for transporting bodies out of the country.
REPORTS	
FR22	A list report that shows gaps in death certificate numbers.
FR23	Listing of death certificates with pending cause of death, showing the name of decedent, the certifier, municipality of occurrence, date of death, and length of time registered, and NFN, produced on demand. (NAPHSIS Report 16.0)
FR24	Print a complete history of a record including all the corrections or amendments associated with the record, searches on the record, requests for the record, and copies made. The report shows the chronological order of these activities and identifies the changes made to the record.
FR25	On-demand listing of key fields used for SSN verification that were changed on the death certificate (as defined by SSA and the State) after the SSN number had been verified. The listing shows the user id of the user who changed the key fields and the specific fields changed. (NAPHSIS Report 18.5)
EXPORTS and IMPORTS	
FR26	The system is capable of exporting records in the IJE format.
FR27	The system is capable of importing the NCHS Death Bridge Race/Ethnicity file for return of primary race for records with multiple races.
FR28	24-hour Fact of Death Reporting (DFSTATE) meets all the specifications as prescribed by SSA.
FR29	The system produces a file in a format compatible with the NIOSH Occupation and Coding System.
FR30	The system can import the file of coded records returned from NIOSH into the database.

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FR31	The system produces a statistical extract with all data fields and flags on a record.
FR32	The system is capable of importing the IJE Birth Infant Death file.
FR33	The system is capable of exporting the IJE Birth Infant Death file.
FR34	The system is capable of importing the IJE Mortality Roster file.
FR35	The system is capable of exporting the IJE Mortality Roster file.
FR36	The system is capable of exporting the SSA Jurisdiction Death Extract File (DFSTATE).
FR37	Separate extracts from the death and birth/infant death datasets for agency analysis and formal publication
FR38	The system produces an export that is a complete dataset based on given parameters that can be pulled at will by authorized users.
Birth Record Outputs	
FORMS and CERTIFICATES	
FR39	A form generated from a birth record used for investigation purposes. The form is Jurisdiction defined and prints on white paper.
FR40	Print a form to be filled out by the mother or parents to collect the birth data. The form can be printed in English or Spanish.
FR41	Print a form to be filled out by the facility to collect the birth data. The form can be printed in English or Spanish.
FR42	A form with birth information on it for verification by the parents. The form is Jurisdiction defined and provides a space for the mother to sign. The verification form contains two signature locations with labels populated based on the requested parent type (mother/mother, mother/father, etc.).This is not a certified legal copy and is marked as such. The form can be printed in English or Spanish.
FR43	Print a complete legal certified copy of a birth certificate after registration. This form is Jurisdiction defined.
FR44	Print a short form (abstract) of birth record data, generally used to confirm a birth event for government agencies.
FR45	Print a birth certificate that was registered more than one year after the date of birth. This type of certificate is different in format from the standard birth certificate. Prints DELAYED on face. Form is Jurisdiction defined.
FR46	Print a Voluntary Acknowledgement form from the completed birth record to be completed by the parents to establish parentage on a birth certificate. This includes a complete set of rights and responsibilities (instructions). Users may print the Voluntary Acknowledgement and rights and responsibilities (instructions) separately.
FR47	A Jurisdiction defined abstract of a single birth record for a non-Puerto Rico resident. This may be printed from the system to report birth to decedent's Jurisdiction of residence. The form clearly states this is an out of state record and cannot be used for official purposes. The layout is Jurisdiction defined.
LETTERS	
FR48	Instructions for filing a birth certificate for a delayed birth.
FR49	Create a Jurisdiction defined and user editable letter to the parents or registrant requesting additional information for a delayed birth registration.
FR50	A Jurisdiction defined query letter asking for clarification or missing information on the birth certificate. Portions of the letters are editable by the user.
FR51	A Jurisdiction defined query letter to hospitals requesting additional information on at-risk infants. Portions of the letters are editable by the user.
FR52	Instructions for filing a birth certificate for a planned home birth.
FR53	Create a Jurisdiction defined and user editable letter to the parents or midwife requesting additional information for a home birth.
REPORTS	
FR54	On a monthly basis, a VAP Report is sent to ASUME with state defined information such as number of births with voluntary acknowledgement by type of acknowledgement. The VAP report is State-configurable.

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FR55	A list report that shows gaps in birth certificate numbers.
FR56	Lists or summarizes birth records for which an Voluntary Acknowledgement was filed by the parents. Generated for a specified period of time, List of VAP by type and status (completed, rejected, rescissions) that are processed by facility.
FR57	Report of records entered, completion status, average time between entry to registration, paternity rejection/accepted by individual user. Available for institutions.
EXPORTS and IMPORTS	
FR58	The system is capable of extracting records in the IJE format.
FR60	The system is capable of importing the NCHS Birth Bridge Race/Ethnicity file for return of primary race for records with multiple races.
FR62	The system is capable of exporting the SSA Enumeration at Birth (EAB) file.
FR63	The system is capable of importing the Child SSN EAB Feedback File.
	Separate extracts from the birth datasets for agency analysis and formal publication
	On a monthly basis, a VAP Export is sent to ASUME with state defined information such as number of births with voluntary acknowledgement by type of acknowledgement. The VAP export is State-configurable.
Fetal Death Record Outputs	
FORMS and CERTIFICATES	
FR67	On demand, print a report of all data in the Fetal Death record.
FR68	Print a blank Facility Worksheet for the Report of Fetal Death at a hospital. The form can be printed in English or Spanish.
FR69	Print a blank Patient's Worksheet for the Report of Fetal Death at a hospital. The form can be printed in English or Spanish.
FR70	Print a Jurisdiction defined form for the parents to review. The form can be printed in English or Spanish.
FR71	Abstract of a single fetal death report for a non-Puerto Rico resident. Used to report fetal death to mother's state/Jurisdiction of residence.
FR72	Print the form "Certificate of Birth Resulting in Stillbirth" on demand for a specific case. This does not contain cause of death information and fields are Jurisdiction defined.
LETTERS	
FR73	A letter sent to hospitals requesting information on missing or contradictory items.
REPORTS	
FR74	A report that lists all fetal deaths that matches a live birth (subsequent infant death).
FR75	A report that lists all fetal deaths that matches a death record.
EXPORTS and IMPORTS	
FR76	The system is capable of exporting records in the IJE format.
FR77	The system is capable of importing the NCHS Fetal Death Bridge Race/Ethnicity file for return of primary race for records with multiple races.
FR78	Separate extracts from the fetal death datasets for agency analysis and formal publication
FR79	The system produces an export that is a complete dataset based on given parameters that can be pulled at will by authorized users.
Marriage and Divorce Record Outputs	
FORMS and CERTIFICATES	
FR80	A document with standard instructions for completing the marriage license.
FR81	The Marriage Certificate is printed pre-ceremony with basic information from the Marriage License such as the applicant names.
FR82	The Marriage Certificate is printed with all information completed after the record is registered.
FR83	The Prenuptial Agreement Certification is a certified copy of a Prenuptial Agreement filed at the time of marriage registration.

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FR84	A form generated from a marriage record used for investigation purposes. The form is Jurisdiction defined and prints on white paper.
FR85	The Officiant Certification is printed with all information from a wedding officiant's license after the officiant has been registered.
FR86	Print a blank Marriage License that is provided to the future spouses.
FR87	Print a Statement of Single Status that verifies the individual does not have a current marriage on file in the Jurisdiction.
FR88	Verification of No Marriage verifies that an individual has never been married in Puerto Rico.
	REPORTS
FR89	A frequency report by month showing the number of marriages in the month in the year, and also showing the cumulative frequency as a count and percentage.
	EXPORTS and IMPORTS
FR90	The system allows a user to run a single statistical extract with divorce data. The extract layout is Jurisdiction defined and includes a field to indicate under which scenario the divorce was registered.
FR91	Separate extracts from the marriage and divorce datasets for agency analysis and formal publication
FR92	The system produces an export that is a complete dataset based on given parameters that can be pulled at will by authorized users.
	Correction, Amendment, and Annotation Reports and Legal Letters
	FORMS
FR93	EVRS supports the generation of a form for the request to change the gender on a birth record. It also allows the user to enter the evidence information prior to printing.
FR94	EVRS supports the generation of an amendment form, which contains pre-populated data from the amended record. The form is used to document the original and new values resulting from the amendment. The form is printed by the vault and stored with the original record.
FR95	Option to print a sealed envelope when an amendment is completed.
FR96	For legacy records, print a single page with the system's unique identifier on the record, the new National File Number, and the removal date.
FR97	EVRS supports the generation of a form for the amendment of a birth or death record, pre-populated with information from the event record. It also allows the user to enter the evidence information prior to printing.
	LETTERS
FR98	Instructions for requesting an amendment on a record.
FR99	Instructions for filing and requirements for a gender change request.
FR100	Instructions for filing an emancipation
FR101	A letter to requestor indicating that amendments have previously been made on a certificate, and no further amendments may be made without a court order.
FR102	Instructions for requesting a name change on a birth record.
FR103	Instructions for requesting legitimation on a birth record.
FR104	Instructions for requesting voluntary acknowledgement of parentage on a birth record.
FR105	A letter to the requestor indicating that the amendment must be processed in a different state/jurisdiction and that documents are being returned.
FR106	A letter to the requestor or child's state/Jurisdiction of birth indicating that the adoption must be processed in the child's state/Jurisdiction of birth and that documents are being returned.
FR107	Additional letter templates may be generated by the Central Office and added to EVRS.
	REPORTS
FR108	Provide a report of all birth records that have received an annotation registered within a user specified period of time. Includes numbers by user and totals for specified time period. Report is run on demand.

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FR109	Provide a report of all emancipations registered within a user specified period of time. Includes numbers by user and totals for specified time period. Report is run on demand.
FR110	A report containing the number and timeliness of corrections/amendments completed by amendment code, produced on demand with month-to-date and year-to-date totals. Report needs to be broken out by user (and transaction type) and contain Central office totals. Report can be run by employees showing type of transaction or by transaction type. Report contain subtotals and totals at appropriate breaks based on the sequence selected by the user. (NAPHSIS Report 28.0)
Request Outputs	
FORMS	
FR111	A form generated from search results used to verify if a record has been registered prior to establishing a delayed registration.
FR112	EVRS supports the generation of a form for the request of a delayed birth certificate. It also allows the user to enter the evidence information prior to printing.
FR113	Form that can be printed blank from the EVRS giving permission to a legal representative to have access to a vital record.
FR114	Application form to request a search and certified copy of a birth certificate.
FR115	Application form to request a search and certified copy of a death certificate.
FR116	Application form to request a search and certified copy of a fetal death certificate.
FR117	Application form to request a search and certified copy of a marriage certificate.
FR118	List of requirements for someone to be eligible to obtain a certified copy of a birth or death record.
FR119	The system provides the option to print a genealogy report. The report is designed to outline the family history of the applicant. The layout is Jurisdiction defined and the report is printed on white paper.
FR120	A document to accompany a completed request, listing the items produced and the associated fees. Document format must conform to the format of existing mailing envelopes.
LETTERS	
FR121	Print a letter to a customer explaining why the stamp(s) were cancelled and what to do to correct the situation. Reasons for use include no record found, invalid ID, etc.
FR122	A request for additional information to process a delayed death certificate.
FR123	Instructions for filing a delayed certificate of birth.
FR124	A request for additional information to process a delayed birth certificate.
FR125	A letter stating that the requestor must have a court order to establish a delayed birth certificate.
FR126	Print the insufficient letter with indication of a reason why a request could not be processed (ex. no record found, insufficient payment, ineligibility).
FR127	A letter stating the types of records that are on file for each event type and the fee associated with each.
REPORTS	
FR128	Totals sales by month by request type, including searches that resulted in a record not found. The report indicates total sales in dollars and quantity.
FR129	A report that provides, for a user-specified time period, the number of requests filled by the type of record (birth/death) for each user, including month-to-date and year-to-date figures. (NAPHSIS Report 23.0)
FR130	A report for a given record, showing the certified copies produced from the record, who requested them, and when.
FR131	A report showing all the certified copies produced as a result of a request from a particular requestor.

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FR132	An on-demand report that provides, for a specified time period, the number of requests for certification/verification searches by selected requestors (genealogy, social services, child support, etc.) including the ability to report year-to-date figures. (NAPHSIS Report 25.0)
Accounting Outputs	
FORMS	
FR133	An itemized list of requests included in the amount due is printed for each billable account to be sent with the invoice.
FR134	A single page transmittal sheet can be printed separately or along with an invoice. The sheet is clearly marked "This is not a bill". The layout is Jurisdiction defined.
FR135	A form that is printed to provide to the Department of Treasury to process a refund. The layout is Jurisdiction defined.
LETTERS	
FR136	Daily money order report. It is printed nightly to exchange money orders for stamps. The report lists request numbers, total, money order number and amount.
FR137	A report that can be printed from the system tracking the number of issuances and security paper voided. The report can be run by office or work unit, and by timeframe. The report is produced on demand.
FR138	Annual fiscal report used for budgeting the upcoming fiscal year.
FR139	Print letter to send to customers who are invoiced for records informing them of payment due.
FR140	The system includes a "past due notice" on an invoice.
REPORTS	
FR141	A report showing the day's business according to the breakdown of fees. Can be summary or detailed.
FR142	Number and receipts for "No Record Found" searches by type of event (birth, death, fetal death, amendments) and method of delivery (walk-in, standard mail, expedited, VitalChek, web). Produced on demand with year-to-date totals or for other time periods based on user selection at the time the report is run. (NAPHSIS Report 4.0)
FR143	A total of all fees billed for certified copies to governmental entities, by organization for a specified time period. For internal use only.
FR144	Report tracking the number of free issuances to Jurisdiction and federal agencies. Produced on demand.
FR145	Total sales for the month by payment type. Report may include payment type by transaction, appropriate budget number, G/L account number, Jurisdiction-specific codes. Transactions paid by money order include money order number.
Inventory Outputs	
FORMS	
FR146	On demand, print a packing slip for inventory of items ordered through EVRS. Security paper orders include paper number range and/or numbers.
FR147	Produce a receipt of shipment that can be sent to Central Office by email/message or be printed.
FR148	On demand, produce an order form for system users (hospitals, regional offices, etc.) to request forms or DCN paper from the Central Office. Order form can be printed or emailed.
LETTERS	
FR149	A letter indicating discrepancy in security paper inventory, and requesting information to resolve the discrepancy. Letter may be printed or emailed.
REPORTS	
FR150	A monthly usage report listing the number of certified copies issued, voided forms, second copies, and optionally includes details of all certificates used or voided. Summarized by location and is generated for a designated period of time.
FR151	A report summarizing security paper usage and voids. Generated on demand by site, for a range of dates.
FR152	Identification of forms assigned to a specific system user or location.

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Productivity/Audit Reports	
REPORTS	
FR153	The system provides a way to track activity at the local level and produce a report on demand by location. The report is Jurisdiction defined.
FR154	A listing of potential duplicate records, selectable by event type. Produced on demand. (NAPHSIS Report 45.0).
FR155	Listing of voided records, selectable by event type. Produced on demand.
FR156	Print a report of gaps in the NFN by event type including, voided certificate numbers. Voided certificates are clearly identified in the report. This report is done in Excel format.
FR157	Number of services provided and the average completion time (in days) by type of record and service. Produced weekly by user and monthly and/or annually on demand. (NAPHSIS Report 32.5).
FR158	Number of corrections/amendments processed and number and percent of corrections/amendments that were rejected by type of record. Produced on demand for each employee. (NAPHSIS Report 33.0).
FR159	Number of certificates data entered by the Jurisdiction staff by type of certificate (birth, death, fetal death), showing the number and percentage of records flagged for correction and/or query. Produced by user showing daily, month-to-date, and year-to-date totals. May also be produced on demand. (NAPHSIS Report 35.0).
FR160	A listing of users with invalid attempts equal to the threshold during login, showing name of user, user id, and institution. Produced on demand by the application administrator. (NAPHSIS Report 40.0).
FR161	A report, by event type, of data entered records that were rejected for registration, and records which were "unlocked" at the Central Office. Generated on demand, for a specified time period. Jurisdiction defined format and able to run by user.

7.5 Attachment E: Instructions for Completing Exhibit E.1 - E.3 - Degree of Fit Matrices

Instructions for completing the following exhibits:
- E.1 Degree of Fit Business Requirements
- E.2 Degree of Fit General Requirements
- E.3 Degree of Fit Forms Requirements

The spreadsheets are organized by process. Each tab contains a process. At the top of each spreadsheet are 10-50 blank rows. These rows are for the Vendor to indicate if there are any PR specific requirements (**Attachment B: PR Narratives and Requirements**) that the Vendor does not believe they can provide. The Vendor may add rows to this section as needed. It is the Vendor's responsibility to indicate which PR specific rules they are unable to provide. The Vendor may add a comment if desired.

If the Vendor, after reviewing **Attachment B: PR Narratives and Requirements**, agrees that all the business rules listed in **Attachment B** can be delivered to Puerto Rico as part of their Core/base system or as an addition to the existing system, the Vendor should leave this section blank. No response is needed.
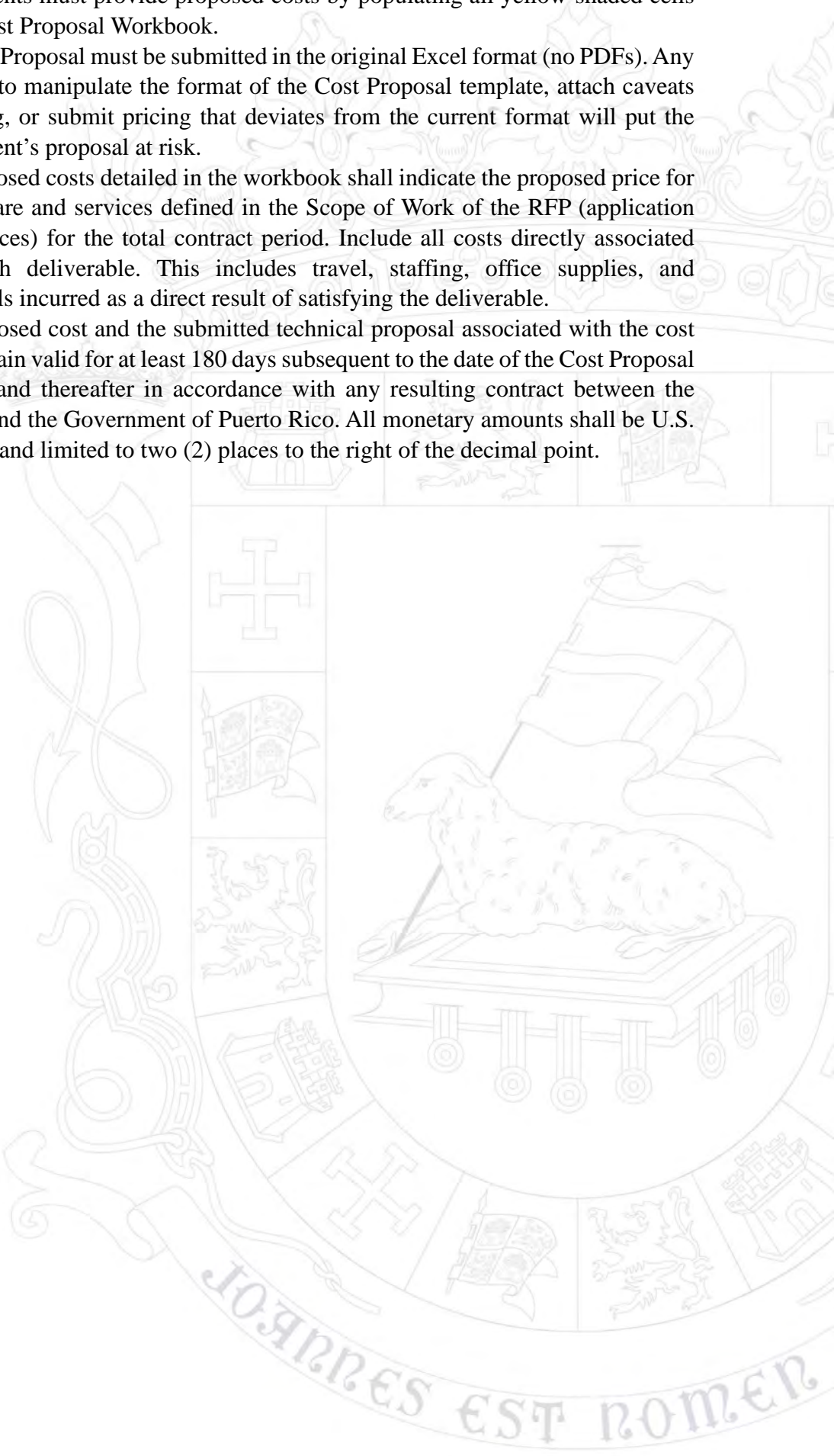
Puerto Rico Bonus Rules:
The following section defines the Business Requirements that Puerto Rico considers "nice to have" but are not required for the implementation. The Vendor must select a response for each rule from the dropdown list provided. The options are:

Condition	Description
Yes	The Vendor can deliver the functionality as defined as part of the Core/base system or as an addition to the Core/base system. Adding to the Core/base system may require configuration or development, and the Vendor agrees to accept that responsibility to provide this functionality.
No	The solution proposed for the Jurisdiction does not provide this functionality and will not be enhanced to meet this requirement.

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7.6 Attachment F: Instructions for Completing Exhibit F – Cost Proposal

Instructions for completing the following spreadsheets in the Cost Proposal Workbook.

1. Respondents must provide proposed costs by populating all yellow-shaded cells in the Cost Proposal Workbook.
2. The Cost Proposal must be submitted in the original Excel format (no PDFs). Any attempts to manipulate the format of the Cost Proposal template, attach caveats to pricing, or submit pricing that deviates from the current format will put the Respondent's proposal at risk.
3. The proposed costs detailed in the workbook shall indicate the proposed price for all software and services defined in the Scope of Work of the RFP (application and services) for the total contract period. Include all costs directly associated with each deliverable. This includes travel, staffing, office supplies, and incidentals incurred as a direct result of satisfying the deliverable.
4. The proposed cost and the submitted technical proposal associated with the cost shall remain valid for at least 180 days subsequent to the date of the Cost Proposal opening and thereafter in accordance with any resulting contract between the Offeror and the Government of Puerto Rico. All monetary amounts shall be U.S. currency and limited to two (2) places to the right of the decimal point.

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RFP-PS-2025-2026-018-VITAL RECORDS-DEM REG
Comprehensive Electronic Vital Records System of the
Demographic Registry of the Puerto Rico Department of Health

7.7 Calendar and Information

Applicant Unit:	Demographic Registry
Contact Information:	Carlos Padilla Cruz 787-765-2929, ext. 3450
Application Number:	**RFP-SP-2025-2026-018-VITAL RECORDS-DEM REG**
Application Name:	**COMPREHENSIVE ELECTRONIC VITAL RECORDS SYSTEM OF THE DEMOGRAPHIC REGISTRY OF THE PUERTO RICO DEPARTMENT OF HEALTH**
Service Category (Technology, Management Consulting, etc.):	Technology
Date of Publication	Tuesday, December 09, 2025
Deadline for Questions	Tuesday, December 16, 2025 on or before 2:00 pm AST
Deadline for answering questions	Thursday, December 18, 2025 on or before 5:00 pm AST
Submit Proposal	Department of Health, **Auction Office** 1575 Ponce de León, Rd 838, Km. 6.3, Sector El Cinco, Bo. Monacillos Urbano, San Juan, PR 00926
Deadline for Submitting Proposals:	Thursday, January 08, 2026, or before 2:00 pm AST
Request for Documentation Related, send to:	subastas@salud.pr.gov

<div align="center">**PORTADA**</div>

FONDOS SOLICITADOS PARA DESARROLLO DE INSTRUMENTO

1. Presupuesto solicitado: _____ **2.** Periodo solicitado: _____

3. Data Universal Numbering System (DUNS):_____

4. Número Seguro Social Patronal:_____

5. System for Award Management (SAM):_____

Periodo de vigencia: Desde: _____ Hasta: _____

INFORMACIÓN DE LA ENTIDAD

6. Nombre de la entidad que presenta la propuesta: _____

7. Dirección Postal:

8. Dirección Física:

9. Teléfono:_____ Fax:_____ E-mail:_____

INFORMACIÓN DEL SOLICITANTE

10. Personas Autorizadas:

Nombre:_____Firma:_____Puesto:_____Fecha:_____

<div align="center">(Director(a) Ejecutivo(a))</div>

Nombre:_____Firma:_____Puesto:_____Fecha:_____

<div align="center">(Presidente(a) Junta de Directores)</div>

Nombre:_____Firma:_____Puesto:_____Fecha:_____

(Representante Autorizado que firma contrato o enmienda)

11. Persona Contacto:

Nombre:_____ Puesto:_____ Teléfono:_____ Fax:_____

PARA USO OFICIAL

Fase de Evaluación: _____ Recomendada _____ No recomendada

Nombre:_____ Firma:_____ Puesto:_____ Fecha:

Fase de Selección: _____ Seleccionada _____ No Seleccionada

Nombre:_____ Firma:_____ Puesto:_____ Fecha:

DESCRIPCIÓN DE LA ORGANIZACIÓN

DESCRIPCIÓN DE LA ORGANIZACIÓN	
1. Nombre de la entidad:	**2.** Fecha de Fundación:
3. Año de Incorporación, si aplica:	**4.** Fecha en que comenzó a proveer el servicio que propone:
5. Nombre del/la oficial principal de la entidad (Ej. Director/a Ejecutivo/a)	**6.** Tiempo en puesto:
7. Misión, visión y valores	
8. Tipo de servicios/esfuerzos que realiza la entidad, en general:	

OFERTA DEL LICITADOR

Fecha: _____

_____
Nombre Compañía / No. Licitador

[ ] Negocio privado ,   [ ] Corporación,   o   [ ] Asociación, por la presente somete su oferta.

Seguro Social Patronal: _____

Hacemos constar que hemos leído todas las instrucciones, términos, condiciones y cláusulas del pliego de subastas; que entendemos y aceptamos cumplir con todas las cláusulas contenidas en éstos y en el contrato.

La dirección sometida con esta oferta es la dirección donde recibimos nuestra correspondencia.

Yo, _____, CERTIFICO que estoy autorizado a firmar esta oferta y mi nombre y firma constan registradas en el Registro de Licitadores.

Nombre en letra de molde	Firma	Puesto o cargo que ocupa

Dirección Postal:	Dirección Física:
Número de Teléfono:	Correo Electrónico:

Corporación Foránea

Nombre del Agente Residente	Dirección	Número de Teléfono y Correo electrónico

Departamento de Salud
Gobierno de Puerto Rico

Yo,_____, en mi carácter personal, mayor de edad,
_____(nombre y apellidos)

_____._____, y vecino de_____,_____,
(estado civil)   (profesión)   (ciudad)   (país o estado)

CERTIFICO LO SIGUIENTE:

1. Que mi nombre y demás circunstancias personales son las anteriormenteexpresadas.
2. Que comparezco como dueño de negocio de tipo individual.
3. Que el nombre comercial de mi negocio (D/B/A, *si aplica*), es el siguiente, _____.
4. Que el propósito del negocio individual que represento es proveer los siguientesbienes, obras y/o servicios profesionales o no profesionales: *(escriba a que se dedica)*

   _____

   _____

   _____

5. Que las siguientes personas, **cuyas firmas aparecen en el presente documentomás adelante**, están autorizadas a nombre y en representación del negocio, a firmar las ofertas que se sometan como parte de los procesos de compra de bienes y servicios profesionales y no profesionales que se lleven a cabo por las distintas agencias, corporaciones públicas y municipios del Gobierno de Puerto Rico.
6. Que **las firmas de las personas que constan en el presente documento** obligan al negocio que represento en todos los procesos de compra de bienes y servicios profesionales o no profesionales realizados por las agencias de la RamaEjecutiva del Gobierno de Puerto Rico, corporaciones públicas y municipios. De igual forma, dichas personas están autorizadas a firmar ofertas y suscribir todo tipo de documento requerido como parte de dicha comparecencia.

Nombre y Apellidos	Posición	Firma

7. Que suscribo la presente Certificación con el propósito de cumplir con uno de losrequisitos para ingresar al Registro Único de Licitadores (RUL) o al Registro Único de Proveedores de Servicios Profesionales (RUP) y para cualquier otro propósitoadministrativo o legal pertinente.

Y PARA QUE ASÍ CONSTE, firmo la presente certificación en_____,
                                                          (ciudad)
_____, hoy_____de_____de 20_____.
(país o estado)

_____
FIRMA

Afidávit Número: _____

JURADA Y SUSCRITA ante mí por _____, de las circunstancias personales antes mencionadas, en su carácter de _____ de la _____(tipo de negocio) y a quien identifico mediante _____.

En _____,_____, hoy_____de _____ de 20___.

_____   _____
Nombre del (de la) Notario(a)   Firma del (de la) Notario(a)

RESOLUCIÓN CORPORATIVA

(no se aceptará Declaración Jurada que tenga
borrones, tachaduras o corrector)

Yo_____, mayor de edad, (estado civil) _____, (profesión) _____, y vecino de _____, en calidad de _____ de la (tipo de negocio) _____, certifico, que en reunión celebrada el día _____ de _____ de 20_____, a la cual asistió el quórum reglamentario, se resolvió autorizar a las personas nombradas a continuación, para que cualquiera de ellas, a nombre y en representación de esta Corporación, puedan comparecer a los procesos de compra de bienes y servicios no profesionales realizados por las agencias de la Rama Ejecutiva del Gobierno de Puerto Rico, corporaciones públicas y municipios, así como firmar ofertas y suscribir contratos y todo tipo de documento requerido como parte de dicha comparecencia, por lo que sus firmas, las cuales se hacen constar en este documento, obligan a esta (tipo de negocio) _____.

Nombre y Apellido	Posición	Firma

En mi carácter de _____ de la (tipo de negocio) _____, certifico, además, que la Resolución arriba transcrita no ha sido revocada, anulada o enmendada en forma alguna y que se mantiene vigente con toda su fuerza y vigor.

PARA QUE ASÍ CONSTE, firmo la presente y estampo el sello de la _____ (tipo de negocio).

En _____, _____, hoy ____ de _____ de 20___.

_____
Firma del (de la) Declarante
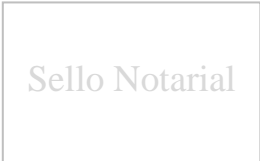
Sello Negocio

AFIDÁVIT

Afidávit Número: _____

JURADA Y SUSCRITA ante mí por _____, de las circunstancias personales antes mencionadas, en su carácter de _____ de la _____ (tipo de negocio) y a quien identifico mediante _____.

En _____, _____, hoy ____ de _____ de 20___.

_____   _____
Nombre del (de la) Notario(a)   Firma del (de la) Notario(a)

Sello Notarial

DECLARACIÓN JURADA

Yo, _____, mayor de edad, ☐soltero(a)

☐casado(a) y residente en _____, en representación de la

compañía _____,

organizada como ☐corporación, ☐sociedad, ☐negocio individual u ☐otro

(especifique) _____, ocupando el cargo de _____ en

la compañía antes indicada, bajo juramento, declaro lo siguiente:

1. Que mi nombre y demás circunstancias personales son las anteriormente expresadas.

2. Que entiendo y acepto que toda persona natural o jurídica que desee participar de la adjudicación de una subasta o en el otorgamiento de algún contrato con cualquier agencia o instrumentalidad gubernamental, corporación pública, municipio, o con la Rama Legislativa o Rama Judicial, para la realización de servicios o la venta o entrega de bienes, someterá una declaración jurada ante notario(a) público(a), según establecido en el Artículo 3.3 de la Ley Núm. 2-2018 conocida como "Código Anticorrupción para el Nuevo Puerto Rico".

3. Que el (la) suscribiente, la compañía _____, o su presidente(a), vice-presidente(a), director(a), director(a) ejecutivo(a) o miembro(s) de una Junta de Oficiales o Junta de Directores(as), o persona(s) que desempeñe(n) funciones equivalentes para la persona jurídica:

   ☐no ha sido convicto(a), ni se ha declarado culpable de cualquiera de los delitos enumerados en la Sección 6.8 de la Ley Núm. 8-2017, según enmendada, conocida como "Ley para la Administración y Transformación de los Recursos Humanos en el Gobierno de Puerto Rico", o por cualquiera de los delitos contenidos en la Ley Núm. 2-2018, conocida como "Código Anticorrupción para el Nuevo Puerto Rico".

   ☐ha sido convicto(a) o se ha declarado culpable de cualquiera de los delitos, según enumerados en la Sección 6.8 de la Ley Núm. 8-2017, según enmendada, o por cualquiera de los delitos contenidos en la Ley Núm. 2-2018, antes mencionada. En tal caso, se indica lo siguiente:

Nombre de la compañía:
_____

Nombre de su subsidiaria:
_____

Nombre y apellido de la persona aplicable, según establecido en la Ley Núm. 2-2018:
_____

Cargo en la Compañía:
_____

Delito:
_____

Fecha (D/M/A):	País:	Organismo o Tribunal:

4. Que entiendo y acepto que la convicción o culpabilidad por cualesquiera de los delitos enumerados en las citadas leyes inhabilitará de contratar o licitar a la persona natural o jurídica con cualquier entidad gubernamental, corporación pública, municipio, la Rama Legislativa y la Rama Judicial, por los términos aplicables bajo el artículo 6.8 de la Ley Núm. 8-2017, o diez (10) años contados a partir de la fecha en que termine de cumplir la sentencia cuando no se disponga un término en la citada Ley. Esta prohibición aplicará a cualquier delito, según establecido anteriormente, o su equivalente tanto en Puerto Rico, como en la jurisdicción federal, los estados, territorios de los Estados Unidos de Norteamérica o cualquier otro país.

5. Que la compañía _____, representada por el (la) suscribiente, tiene el deber y se compromete a informar continuamente, de forma inmediata, si el (la) suscribiente, o su presidente(a), vice-presidente(a), director(a), director(a) ejecutivo(a) o miembro(s) de una Junta de Oficiales o Junta de Directores(as), o persona(s) que desempeñe(n) funciones equivalentes para la persona jurídica, alguna vez resultara convicto(a) o se haya declarado(a) culpable o se encuentre(n) bajo investigación por los delitos contenidos en la Sección 6.8 de la Ley Núm. 8-2017, según enmendada, o por cualquiera de los delitos contenidos en la Ley Núm. 2-2018, antes mencionada.

6. Que suscribo esta declaración jurada de conformidad con lo establecido en la Ley Núm. 2-2018 y que hago la presente declaración jurada para que cualquier entidad gubernamental, corporación pública, municipio, la Rama Legislativa o la Rama Judicial tenga conocimiento de lo aquí declarado y para cualquier otro propósito administrativo o legal.

Y para que así conste, juro y firmo esta declaración en _____, Puerto Rico, el ____ de _____ de ____.

_____
Firma del (de la) Declarante

AFIDÁVIT

Afidávit número: _____

Jurado y suscrito ante mí por _____, de las circunstancias antes mencionadas y a quien identifico mediante _____.

En _____, Puerto Rico, el ____ de _____ de ____.

_____   _____
Nombre del (de la) Notario(a)   Firma del (de la) Notario(a)


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┌─────────────────────────┐
│                         │
│                         │
│      Sello Notarial     │
│                         │
│                         │
└─────────────────────────┘
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Exhibit A - Cover Sheet

The Vendor hereby declares understanding, agreement, and certification of compliance to provide the items and/or services, at the prices quoted, in accordance with all requirements and specifications contained herein and the Terms and Conditions. The Vendor further agrees that the language of this RFP shall govern in the event of a conflict with his/her bid. The Vendor further agrees that upon receipt of an authorized purchase order from the Department of Health or when a Notice of Award is signed and issued by an authorized official of the Puerto Rico Department of Health, a binding contract shall exist between the Vendor and the Puerto Rico Department of Health. The vendor shall understand and agree that in order for their bid to be considered for evaluation, they must be registered in the **Single Registry of Bidders** (**RUL**, Spanish acronym) which is managed by the General Services Administration (**ASG**, Spanish acronym). The vendor must have eligible status in the RUL prior to the award of the contract. The vendor must register in the RUL at the following web address https://asg.pr.gov/ . Requirements for registering in the RUL are available at the following web address https://registros.asg.pr.gov/RequirementsPublic.

NAME AND TITLE OF PERSON WHO CAN BIND COMPANY	SIGNATURE OF PERSON WHO CAN BIND COMPANY
CORPORATE NAME and DBA OF BUSINESS	
MAILING ADDRESS	
CITY, STATE, ZIP CODE	

CONTACT PERSON	EMAIL ADDRESS
PHONE NUMBER	**FAX NUMBER**
VENDOR TAX FILING TYPE WITH IRS (CHECK ONE)	
___ Corporation ___ Individual ___ State/Local Government ___ Partnership ___ Sole Proprietor ___IRS Tax-Exempt	
AUTHORIZED SIGNATURE	**DATE**

BUSINESS REFERENCE'S RESPONSE TO REFERENCE QUESTIONNAIRE
PUERTO RICO DEPARTMENT OF HEALTH
REQUEST FOR PROPOSAL (RFP)

Demographic Registry Electronic Vital Records System

PART A – TO BE COMPLETED BY PROPOSING VENDOR – *Please type or print*
Name of Company Submitting Proposal:	

PART B – IF APPLICABLE, NAME OF COMPANY ACTING AS SUBCONTRACTOR FOR VENDOR IDENTIFIED IN PART A – *Please type or print*
Name of Subcontractor:	

PART C – BUSINESS REFERENCE INSTRUCTIONS	
1.	This Reference Questionnaire is being submitted to your organization for completion as a business reference for the company listed in Part A or Part B, above.
2.	The completed Reference Questionnaire and return to the company listed in Part A above.
3.	In addition to the Reference Questionnaire, the State may contact references by phone for further clarification, if necessary.
4.	We request all questions be answered. If an answer is not known, please answer as "U/K". If the question is not applicable, please answer as "N/A".
5.	If you need additional space to answer a question or provide a comment, please attach additional pages. If attaching additional pages, please place your company/organization name on each page and reference the RFP # noted at the top of this page.

PART D – STATE PROVIDING REFERENCE – Please type or print CONFIDENTIAL INFORMATION WHEN COMPLETED	
State Providing Reference:	
Contact Name:	
Title:	
Contact Telephone:	
Contact Email Address:	

RATING SCALE:

Where a rating is requested and use the Rating Scale provided below. Rate the following questions by noting the appropriate number for each item. Please provide any additional comments you feel would be helpful to the Puerto Rico Department of Health regarding this contractor.

Category	Rating
Poor or Inadequate Performance	0
Below Average Performance	1 – 3
Average Performance	4 – 6
Above Average Performance	7 – 9
Excellent Performance	10

PART E – QUESTIONS:	
1. Please provide an overview of the project the vendor completed for your organization.	
2. Rate the vendor's knowledge and expertise in both vital records and technology	**RATING:**
Comments:	
3. Rate the vendor's flexibility relative to changes in the project scope and timelines.	**RATING:**
Comments:	
4. Rate your level of satisfaction with hard copy materials produced by the vendor.	**RATING:**
Comments:	
5. Rate the dynamics/interaction between the vendor and your staff.	**RATING:**
Comments:	

PART E – QUESTIONS: (continued)	
6. Rate your satisfaction with the products developed by the vendor.	**RATING:**
Comments:	
7. Rate how well the agreed upon, planned schedule was consistently met and deliverables provided on time. *(This pertains to delays under the control of the vendor.)*	**RATING:**
Comments:	
8. Rate the overall customer service and timeliness in responding to customer service inquiries, issues and resolutions.	**RATING:**
Comments:	
9. Rate the knowledge of the vendor's assigned staff and their ability to accomplish duties as contracted.	**RATING:**
Comments:	
10. Rate the accuracy and timeliness of the vendor's billing and/or invoices.	**RATING:**
Comments:	

PART E – QUESTIONS: (continued)	
11. Rate the vendor's ability to quickly and thoroughly resolve a problem related to the services provided.	**RATING:**
Comments:	
12. Rate the vendor's flexibility in meeting business requirements.	**RATING:**
Comments:	
13. Rate the likelihood of your company/organization recommending this vendor to others in the future.	**RATING:**
Comments:	
14. With which aspect(s) of this vendor's services are you most satisfied?	
Comments:	
15. With which aspect(s) of this vendor's services are you least satisfied?	
Comments:	
16. Would you recommend this vendor to your organization again?	
Comments:	

PART F – GENERAL INFORMATION:

1. During what time period did the vendor provide these services for your organization?			
From: (Month/Year)		To: (Month/Year)	

2. Please indicate which modules and services were provided to your organization.	Check all that apply	Additional Comments
Birth		
Death		
Point of Sale		
Fetal Death		
Marriage		
Divorce		
ITOP		
Interoperability with Hospitals		
Interoperability with Medical Examiner / Coroners		
End User Training		
System Documentation		

Name of Person Completing This Form	
Name and Title	
Date (mm/dd/yyyy)	
Signature	

ATTESTATION TO COMPLIANCE WITH CORPORATE AND STAFFING REQUIREMENTS

On behalf of _____ (Business Entity Name),

I, _____ (Name of Business Entity Authorized Representative), have read and understood the corporate and staffing requirements of this project. I hereby affirm that I am an authorized representative of the business entity and that through my signature below, _____ (Business Entity Name) agrees to comply with all the conditions set forth within the RFP related to corporate and staffing requirements.

I acknowledge that the Commonwealth of Puerto will be relying upon the information provided by the Vendor through the proposal submission process. If such representations provided by my business entity shall cease to be true and accurate in any respect, I shall give immediate notice of such fact to the Commonwealth of Puerto Rico.

_____   _____
Authorized Representative's Signature   Printed Name

_____   _____
Title   Date (mm/dd/yyyy)

Exhibit D - Mandatory Requirements

ATTESTATION TO COMPLIANCE WITH SCOPE OF WORK

On behalf of _____ (Business Entity Name),

I, _____ (Name of Business Entity Authorized

Representative), have read and understood the scope of this project.

I hereby affirm that I am an authorized representative of the business entity and that through my

signature below, _____ (Business Entity Name)

agrees to comply with all associated scope, timelines, milestones, and deliverables of this project.

_____   _____
Authorized Representative's Signature   Printed Name

_____   _____
                Title   Date (mm/dd/yyyy)

ATTESTATION TO COMPLIANCE WITH TERMS AND CONDITIONS

On behalf of _____ (Business Entity Name), I, _____ (Name of Business Entity Authorized Representative), have read and understood the general terms and conditions set forth within the RFP. I hereby affirm that I am an authorized representative of the business entity and that through my signature below, _____ (Business Entity Name) agrees to comply with the stated conditions.

_____   _____
Authorized Representative's Signature   Printed Name

_____   _____
                Title   Date (mm/dd/yyyy)

ATTESTATION TO COMPLIANCE WITH SOFTWARE TERMS AND CONDITIONS

On behalf of _____ (Business Entity Name),

I, _____ (Name of Business Entity Authorized

Representative), have read and understood the special terms and conditions set forth within the

RFP regarding software access, licensing, and ownership rights. I hereby affirm that I am an

authorized representative of the business entity and that through my signature below,

_____ (Business Entity Name) agrees to comply with

the stated conditions.

_____
Authorized Representative's Signature

_____
Printed Name

_____
Title

_____
Date (mm/dd/yyyy)

ATTESTATION TO COMPLIANCE WITH VITAL RECORDS EXPERIENCE

The software vendor must have a minimum of ten years (10) of vital records systems experience with at least three (3) implementations of a complete electronic vital records systems (EVRS) within the United States. A complete EVRS is defined as a complete NCHS/VSCP standards compliant for birth, death, fetal death modules and point of sale integrated with the registration modules.

State	Modules	Start – Finish Date

The software vendor must have, within the last two (2) years, an interoperability implementation with a jurisdictional medical examiners, hospital or health exchange within the United States.

State / Stakeholder Group	Interoperability with which System (CMS, EMR, Funeral Home System?)	Start – Finish Date

I hereby affirm that I am an authorized representative of the business entity and that through my signature below, _____ (Business Entity Name)

I attest that the above information is true and accurate.

_____
Authorized Representative's Signature

_____
Printed Name

_____
Title

_____
Date (mm/dd/yyyy)