



**JUSTICE ADMINISTRATIVE
COMMISSION**

Florida Accountability Contract Tracking System (FACTS)

Transparency Florida Act

- States in part... “The Chief Financial Officer shall provide public access to a state contract management system...”
- Section 215.985(16), F.S., was enacted during the 2011 legislative session
- CFO/Department of Financial Services (DFS) created the on-line contract system: FACTS

Transparency Florida Act- Florida Statutes - Excerpt

TAXATION AND FINANCE

Chapter 215

FINANCIAL MATTERS: GENERAL PROVISIONS

215.985 Transparency in government spending.—

(1) This section may be cited as the “Transparency Florida Act.”.....

(16) The Chief Financial Officer shall provide public access to a state contract management system that provides information and documentation relating to contracts procured by governmental entities.

(a) The data collected in the system must include, but need not be limited to, the contracting agency; the procurement method; the contract beginning and ending dates; the type of commodity or service; the purpose of the commodity or service; the compensation to be paid; compliance information, such as performance metrics for the service or commodity; contract violations; the number of extensions or renewals; and the statutory authority for providing the service.

What Agreements Apply to this Legislation?

Definition of a Contract:

“Any written agreement between two or more parties, with a financial consideration”



-Per DFS Documentation

Florida Accountability Contract Tracking System (FACTS)

- Housed at DFS website
- For use by the citizens of Florida
- Launched to agencies March 1, 2012 (to add contracts)
- Launched to public **June 27, 2012**
- All state agencies
- Full implementation by October 2013

FACTS— CFO Press Release - Excerpts

From: CFO Atwater's Press Office

Sent: Wednesday, June 27, 2012 11:31 AM

Subject: News Release: CFO Jeff Atwater Unveils Web Tool Shining Light on State Contracting

CFO Jeff Atwater Unveils Web Tool Shining Light on State Contracting
Florida Accountability Contract Tracking System (FACTS) provides state contract information online

TALLAHASSEE—Florida Chief Financial Officer Jeff Atwater today launched the Florida Accountability Contract Tracking System—[FACTS](#), a comprehensive online tool that offers Floridians greater visibility into how their government is doing business. The new FACTS tool, available on CFO Atwater's Transparency Florida website, makes state contracting processes transparent through a centralized, statewide contract reporting system.

"The FACTS system reflects my longstanding commitment to my fellow Floridians to make state contracts accessible to the public online," CFO Atwater said... Nearly \$50 billion, or approximately 56 percent of the state budget, is spent on contracts... This system will ensure higher levels of efficiency and accountability from our government and elected leaders." ...



Excluding Contracts from FACTS

- Case-related, confidential, or sensitive contracts may be excluded from FACTS
- Individual offices will determine which contracts to be entered into FACTS
- Agencies may consider crafting a policy statement to explain contracts excluded from FACTS

FACTS: Six Phases

January-April
2012

Development of Web-based application

Beginning
July 1, 2012

Tie Contract data to FLAIR disbursements

Beginning
October 1, 2012

Link scanned procurement and contract documents to each contract

Beginning
October 1, 2012

Provide DFS audit findings for audited contract payments

Future Date:
2013

Provides reporting information specific to grant agreements

Future Date:
2013

Adds new reporting entities

FACTS Phases

- **March 2012 agencies began entering contracts into FACTS**
 - **Contract numbers assigned**
- **July 2012 contract payments entered into FLAIR should include the contract number**
 - **FACTS will “match” contract record to contract payments**



FACTS Phases

- Actual contract documents to be loaded/linked to FACTS – *beginning October 2012*

- Sensitive data to be redacted
- Workload issue
- December 31, 2012 deadline for adding existing contracts to FACTS

- **March-April 2013** other “agreements” to be entered in FACTS:

- Purchase Orders
- Revenue Contracts (county/local agreements)
- Grants

Data Needed for FACTS

- **Contract number/ID –five alpha/numeric characters**
 - **Beginning characters assigned by JAC**
- **Contract amount – if applicable (can be zero)**
- **Short & long title – names the contract**
- **Beginning & ending contract dates**
- **Statutory authority – what statute provides the authority for your office to enter into this contract (e.g. Ch. 27, F.S.)**
- **Method of procurement**

Data Needed for FACTS

- State term contract ID – where applicable
- Contract exemption justification – brief description of reason contract is exempt from procurement rules
- Contract manager information – will not be viewed by the public
- Contract budget – where applicable
- FLAIR 29 – digit account code
- Contract vendor ID – FLAIR vendor ID
- Commodity/service type – choose from list

Data Needed for FACTS

- General description of the contract
- Major deliverable price – amount for any major deliverable, if applicable, can be zero
- Method of payment – is contractor paid by set fee or determined when service is delivered, etc.
- Performance metrics – what determines if/when contractor gets paid

FACTS Contracts – The Data

- **JAC total contracts in FACTS: 149**
 - **State Attorneys: 58 Contracts in FACTS**
- **Most common contract types in FACTS:**
 - **Postage meters**
 - **Copier leases & maintenance**
 - **Westlaw**
 - **BOMS**
 - **Office space leases**
- **60% of State Attorneys have contracts in FACTS (12 offices out of 20)**

FACTS Contracts – Submit to JAC

- **Submit contracts for FACTS to:
Vicki.Nichols@ jac.myflorida.com**
- **Confidential contracts are not required to be entered into FACTS**
- **When a new contract is signed, send contract information for FACTS within 30 days**
- **Contract data in FACTS may be changed, deleted, updated, or altered at any time**

FACTS Agency Log In Screen

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CONTRACT TRACKING SYSTEM**[Contract
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User ID

Password

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Authorized agency representatives are custodians of the data contained in this system. Managing accurate data is each custodian's responsibility. Authorized users are provided with a username and password information. All changes made in the system are recorded and accounted for. The Department of Financial Services does not screen the content provided. Confidential, inaccurately redacted, or incorrect data/files loaded into the system are the responsibility of authorized agency representatives and the agency to resolve. Inquiries related to confidential, or trade secret information received by the Department of Financial Services should be directed to your Agency contact on file.

- If desired, JAC will enter contracts for agencies
- Agencies may enter their own contracts
- Vicki Nichols will provide FACTS access if desired
- Can view contracts without a login ID



Logged In As: NicholsVickiX1 / JUSTICE ADMINISTRATION

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Edit Contract



* REQUIRED FIELDS

Main Contract Information

FLAIR Contract ID *	JACB1
Short Title *	BOMS Maint
Long Title *	CIP BOMS Maintenance
Agency Contract ID *	JACB1
Original Contract Amount * \$	12000.00
Contract Type *	Standard Two Party Agreement by Statute
Contract Status *	Active
Date of Execution * EX: MM/DD/YYYY	07/01/2012
Date of Beginning * EX: MM/DD/YYYY	07/01/2012
Original End Date EX: MM/DD/YYYY	06/30/2013
Statutory Authority *	43.16
Contract Involves State or Federal Financial Assistance	<input type="checkbox"/>

Contract Procurement Information

Authorized Advanced Payment	<input type="radio"/> Yes <input checked="" type="radio"/> No
Method of Procurement *	G - Single source \$2,500 or greater, not to exceed Categ
Method of Procurement Full Description	G - Single source \$2,500 or greater, not to exceed Category Two [Rule 60A-1.002 (3), FAC]
State Term Contract ID	
Contract's Exemption Justification	CIP is the only vendor available to provide this service.
Agency Reference Number	

Top of the FACTS Screen Showing
Some of the Fields to Be Completed



Contract Involves State or Federal Financial Assistance <input type="checkbox"/>		Agency Reference Number <input type="text"/>	
Recipient Type (REQUIRED WHEN FINANCIAL ASSISTANCE IS CHECKED) ---Select---		Business Case Study Done <input type="radio"/> Yes <input checked="" type="radio"/> No	
Agency Service Area <input type="text" value="JAC"/>		Business Case Date EX: MM/DD/YYYY <input type="text"/>	
Provide Administrative Cost <input type="radio"/> Yes <input checked="" type="radio"/> No		Legal Challenges to Procurement <input type="radio"/> Yes <input checked="" type="radio"/> No	
Administrative Cost Percentage <input type="text"/>		Legal Challenge Description <div><div></div><div></div></div>	
Provide for Periodic Increase <input type="radio"/> Yes <input checked="" type="radio"/> No			
Periodic Increase Percentage <input type="text"/>			
Contract Manager Information		Outsourcing / Capital Improvements	
Agency Manager Name * <input type="text" value="Vicki Nichols"/>		Was the Contracted Function Previously Performed by the State * <input type="radio"/> Yes <input checked="" type="radio"/> No	
Phone Number * EX: 9999999999 <input type="text" value="8504882415"/>		Was the Contracted Functions Considered for Insourcing back to the State: <input type="radio"/> Yes <input checked="" type="radio"/> No	
Email * <input type="text" value="vicki.nichols@jac.myfloridagov"/>		Did the Vendor Make Capital Improvements on State Property <input type="radio"/> Yes <input checked="" type="radio"/> No	
General Description GENERAL OVERVIEW OF THE CONTRACT * <div><div>Provide support and maintenance for the Business Office Management System (BOMS) Enterprise Edition.</div><div></div></div>		Capital Improvement Description <div><div></div><div></div></div>	

FACTS Screen Showing More of the
“Main Contract” Fields to Be Completed



Budget



Agency Contract ID: JACB1
Contract Long Title: CIP BOMS Maintenance

FLAIR Contract ID: JACB1

* REQUIRED FIELDS

Budgetary Amount

Amount * \$

Amount Type * ☐ Non-Recurring ☒ Recurring

Account Code

L1	GF	SF	FID	BE	IBI	CAT	YR
21	10	1	000069	21300800	00	100777	00

Fiscal Year Effective Date EX: MM/DD/YYYY

Cost Accumulator

Totals

Original Contract Amount: \$12,000.00

Total Contract Amount: \$12,000.00

Total Recurring Budgetary Amounts: \$12,000.00

Total Non-recurring Budgetary Amounts: \$0.00

Total Budgetary Amount: \$12,000.00

Total Unfunded Amount: \$0.00

RECURRING BUDGETARY AMOUNT	ACCOUNT CODE	FISCAL YEAR EFFECTIVE DATE	FY		
\$12,000.00	21-10-1-000069-21300800-00-100777-00	07/01/2012	2012-2013	Edit	Delete

FACTS Budget Screen Fields
Informational Only – Can be Zero
Will Not Affect Available Budget in FLAIR





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Vendor Information



Agency Contract ID: JACB1
Contract Long Title: CIP BOMS Maintenance

FLAIR Contract ID: JACB1

* REQUIRED FIELDS

Vendor ID *

Add Vendor

VENDOR ID	NAME	ADDRESS	CITY	STATE	ZIP	
F592192243002	COMPUTER INFORMATION & PLANNING	PO BOX 600515	JACKSONVILLE	FL	322600000	Delete

[Back](#)

[Next](#)

FACTS Vendor Screen

Vendor Additions in FACTS are Verified Against
the FLAIR Vendor File



Deliverable



Agency Contract ID: JACB1
Contract Long Title: CIP BOMS Maintenance

FLAIR Contract ID: JACB1

* REQUIRED FIELDS

Add Deliverable

Contract Wide Consequences

☐ Yes ☒ No

[Commodity/Service Type](#) *

252150

Major Deliverable *

Maintenance for BOMS system

Method of Payment *

Fixed Price - Lump Sum

Major Deliverable Price * \$

Non Price Justification

Rate Agreement

Source Documentation Page Reference

Performance Metrics

Provide maintenance and related services for BOMS

Financial Consequences

None

FACTS Deliverables Entry Screen

Choose Commodity, Method of Payment, and
Provide Information Related to Contract Performance





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Contract Information

Published

[Update Contract Details](#)

[Back to Contract Search](#)

Summary

Agency Name: JUSTICE ADMINISTRATION

Long Title: CIP BOMS Maintenance

Total Contract Amount: \$12,000.00

Total Payments to date: NA

General Description: Provide support and maintenance for the Business Office Management System (BOMS) Enterprise Edition.

[Contract Summary Form](#)

Agency Contract ID: JACB1

Vendor Name: COMPUTER INFORMATION & PLANNING

Total Budgetary Amount: \$12,000.00

Date of Execution: 07/01/2012

Details

[Deliverables](#)

[Payments](#)

[Documents](#)

Main Information

Agency Contract ID: JACB1

FLAIR Contract ID: JACB1

Short Title: BOMS Maint

Procurement Information

Authorized Advanced Payment: No

Method of Procurement: Single source \$2,500 or greater, not to exceed Category Two [Rule 60A-1.002 (3), FAC]]

**FACTS Review Screen - Contracts Are Reviewed
Before Publishing to the Web**



Budget Information

Original Contract Amount: \$12,000.00


Total Contract Amount: \$12,000.00

Total Recurring Budgetary Amount: \$12,000.00

Total Non-Recurring Budgetary Amount: \$0.00

Total Budgetary Amount: \$12,000.00

Total Unfunded Amount: \$0.00

[Download Budget Information](#) 

RECURRING BUDGETARY AMOUNT	ACCOUNT CODE	FISCAL YEAR EFFECTIVE DATE	FY	COST ACCUMULATOR	AGENCY AMENDMENT REFERENCE
\$12,000.00	21-10-1-000069-21300800-00-100777-00	07/01/2012	2012-2013		

No Non-Recurring Budgetary records Found for this contract.

[BACK TO TOP](#) ↑

Contract Change

No Contract Changes Found for the contract.

[BACK TO TOP](#) ↑

Vendor

[Download Vendor](#) 

VENDOR ID	NAME	ADDRESS	CITY STATE ZIP
F592192243002	COMPUTER INFORMATION & PLANNING	PO BOX 600515	JACKSONVILLE FL 322600000

[BACK TO TOP](#) ↑

FACTS Review Screen – Scroll Down to View More Information Regarding the Contract



Contract Information

Published

[Update Contract Details](#)

[Back to Contract Search](#)

Summary

Agency Name: JUSTICE ADMINISTRATION

Agency Contract ID: JACB1

Long Title: Computer Information and Planning

Vendor Name: COMPUTER INFORMATION & PLANNING

Total Contract Amount: \$12,000.00

Total Budgetary Amount: \$12,000.00

Total Payments to date: NA

Date of Execution: 07/18/2012

General Description: Computer software maintenance agreement.


[Contract Summary Form](#)

Details

Deliverables

Payments

Documents

[Expand All Deliverables](#) [Download Deliverables](#) 

MORE	COMMODITY TYPE ▲	MAJOR DELIVERABLE	METHOD OF PAYMENT
<input type="checkbox"/>	COMPUTER SOFTWARE DEVELOPMENT AND	Computer software maintenance agreement.	Fixed Price - Lump Sum
<p>Major Deliverable: Computer software maintenance agreement.</p> <p>Deliverable Price: \$12,000.00</p> <p>Non Price Justification:</p> <p>Performance Metrics: Provide computer software support and maintenance.</p> <p>Financial Consequences: none</p> <p>Source Documentation Page Reference:</p>			

FACTS Deliverables Tab – Review Deliverables Information



Contract Information

Published

[Update Contract Details](#)

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Summary

Agency Name: JUSTICE ADMINISTRATION

Agency Contract ID: JACB1

Long Title: Computer Information and Planning

Vendor Name: COMPUTER INFORMATION & PLANNING

Total Contract Amount: \$12,000.00

Total Budgetary Amount: \$12,000.00

Total Payments to date: NA

Date of Execution: 07/18/2012

General Description: Computer software maintenance agreement.

[Contract Summary Form](#)

Details

Deliverables

Payments

Documents

Payments are also referred to as expenditures (creating or incurring a legal obligation to disburse money) or disbursements (the payment of expenditures). Payments include disbursements and accounting adjustments made on a contract. Payments are always positive amounts while accounting adjustments may be positive or negative depending on the type of adjustment.

If a payment or adjustment to a contract was made before July 1, 2012, the information may not be posted in this system.

FACTS Payments Tab – Payments Recorded in FLAIR with this Contract ID will Make a Record Here



Contract Information

Published

[Update Contract Details](#)

[Back to Contract Search](#)

Summary

Agency Name: JUSTICE ADMINISTRATION

Agency Contract ID: JACB1

Long Title: Computer Information and Planning

Vendor Name: COMPUTER INFORMATION & PLANNING

Total Contract Amount: \$12,000.00

Total Budgetary Amount: \$12,000.00

Total Payments to date: NA

Date of Execution: 07/18/2012

General Description: Computer software maintenance agreement.

[Contract Summary Form](#)

Details

Deliverables

Payments

Documents

Documents

Contract Documents

No documents have been added for this contract. To request the contract document, please contact the agency point of contact using the 'Contact Us' link at the top of the page.

Agency Resources

Description: There are no additional agency resources at this time.

FACTS Documents Tab – Contract Documents to be
Posted Here (Beginning October 1, 2012)



Posting Contract Documents to FACTS - Considerations

■ Per DFS, agencies should provide contract documents with main terms & conditions only

- **Contract exhibits may be excluded**
- **Other contract-related documents that are extraneous to the main terms may be excluded**
- **Agencies use best judgment when posting contract documents**

Source: DFS Documentation **



Posting Contract Documents to FACTS - Considerations

■ Extensive redaction of contracts will be necessary

- Trade secret information & logos
- Sensitive information
- Confidential information
- Information that could be misused
- Signatures
- Account numbers
- Addresses
- More.....

Source: DFS Documentation **



Posting Contract Documents to FACTS - Considerations

■ Potential Trade Secret Information – redact before posting

- Pricing
- IT hardware descriptions
- Technology solutions
- Where data is located
- Server link descriptions
- Access and control of information protocols
- Data security risks and solutions

Posting Contract Documents to FACTS - Considerations

■ Other trade secret issues

- Internet posting not contemplated by vendor
- Trade secrets may be in some contracts
- No notice to vendor that contract documents may be posted to internet
- Potentially large areas of redaction for posted documents
- Agency may be required to notify vendor of potential posting of trade secrets
- Logos may need to be redacted from documents

Source: DFS Documentation **



Posting Contract Documents to FACTS - Considerations

■ Sensitive information that may be necessary to redact

- Information that could be used to facilitate identity theft
- Information that could be used to facilitate fraud
- Information that could be used to damage a vendor

Posting Contract Documents to FACTS - Considerations

■ Sensitive information that may be necessary to redact

- Not technically confidential, but may cause harm in “hands” of wrong person
 - Addresses
 - Signatures
 - Company’s references
 - Company’s staffing information
 - Company’s financial statements
 - Company’s client lists
 - Company’s organizational layout

Posting Contract Documents to FACTS – Next Steps

- **Determine what information should be redacted from existing FACTS contracts**
- **Provide redacted FACTS contract documents to JAC**
 - **Begin sending at any time**
 - **Deadline for posting to FACTS website:
December 31, 2012**
- **On-going monitoring of contract transparency requirements**

Department of Financial Services – FACTS Website

<http://www.myfloridacfo.com/aadir/statewidecontractreporting.htm>



JEFF ATWATER, CHIEF FINANCIAL OFFICER
FLORIDA DEPARTMENT OF FINANCIAL SERVICES

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Florida Accountability Contract Tracking System (FACTS)

Welcome to the Florida Accountability Contract Tracking System (FACTS), an online tool developed to make the government contracting process in Florida more transparent through the creation of a centralized, statewide contract reporting system. Through FACTS, the ability to track state contracts by government agencies and the public will foster greater accountability and transparency in government spending.

The 2010 Florida Legislature took steps to provide Floridians with greater visibility into how their government is doing business by passing the "Transparency Florida Act". As part of this initiative, the Department has created the FACTS. The system was rolled out to State Agencies for recording their active contracts on March 1, 2012. Upon completion of the project in October 2013, the system will contain images, financial information, and audit findings of all grant and contract documents, with a user-friendly query tool to provide users and the public with access to the information.

[FACTS](#) (Public View)

[FACTS Login Screen](#) (State Agencies Only)

[FACTS User Manual](#)

[FACTS Contract Summary Form](#)

[User Account and Password Assignment Procedure](#)

[Project Documentation](#)

[Meetings](#)

****DFS
Documentation
for FACTS
Found Here**



Questions??

- Contact:

Vicki Nichols

850-488-2415, ext. 231

vicki.nichols@jac.myflorida.com

